



A social impact accelerator supporting the development and enhancement of corporate community outreach programs.



SOCIAL IMPACT PLAYBOOK

Co-Written by: Allyn Pon and DeLinda Forsythe

Inspired by: Points of Lights

Playbook donation brought to you by *Cause San Diego* and *Optima Office*



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Table of Contents

1	INTRODUCTION.....	3
2	THE SAN DIEGO NONPROFIT ECOSYSTEM.....	4
3	THE FOUR I's – A SOCIAL IMPACT FRAMEWORK.....	6
4	INVOLVEMENT.....	8
5	INTEGRATION.....	10
6	IMPACT.....	16
7	INSPIRATION.....	18
8	WHY SOCIAL IMPACT IS IMPORTANT TO BUSINESSES.....	22
9	THREE MAJOR PHASES TO SUCCESS.....	24
10	SAN DIEGO RESOURCES.....	26
11	SOCIAL IMPACT PLANNING CHECKLIST.....	27



Introduction

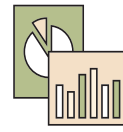
THIS SOCIAL IMPACT PLAYBOOK is designed by Cause San Diego as a tool to help San Diego for-profit organizations better serve their needs to initiate or participate in the social impact community. Our mission is to improve our community by harnessing the immense influence of the business sector. How can we accomplish this? We host an annual Cause Conference, a tradition started in 1998 that has evolved into a powerful day of sharing stories of highly successful social innovators both locally and globally, bonding San Diego for-profit businesses to nonprofit organizations, creating awareness of the needs of San Diego citizens and facilitating a unified mindset.



Values



Resources



Financials

We've crafted this playbook as a framework to implement a social impact strategy that aligns with each organization's values, resource availability and financial capabilities, regardless of size. We believe this blueprint for success can become a defining moment not just for San Diego but a map for communities across our great nation to follow.

In 2022, Gallup and Bentley University teamed up in a multi-year effort to understand how the role of business in our society is evolving. The result was the first **Gallup-Bentley University Force for Good Report** which we encourage you to download and study. It was designed to identify where consumers and employees feel business is succeeding in bringing about positive change and where it is falling short.



Much of this shift has been influenced by the COVID-19 pandemic. Younger generations facing this once-in-a-lifetime adversity, believe corporate America must step up to. 82% of Americans aged 18-24 would pay more for a product if the company was known for having a positive impact in their community. Businesses can no longer focus only on financial performance because their employee's and customer's expectations have expanded.

The role of business in our society is evolving, and we have a unique opportunity to influence how and to what degree. People expect more from companies than simply increasing profits and meeting shareholder goals. This matters because as people's expectations expand and businesses change to meet them, businesses themselves will have a larger role in shaping our society – everything from how we debate political ideas to how we treat the poorest among us. It is critical that we as leaders in business education – and businesses themselves – understand this evolution in attitude as it happens.

— E. LaBrent Chrite, *President Bentley University*

Much of the content and inspiration of this playbook was developed by Points of Light, a global nonprofit organization that inspires, equips and mobilizes millions of people to take action to change the world. They have 177 affiliates across 38 countries in partnership with thousands of nonprofits and companies. Points of Light engages 5 million volunteers in 16 million hours of service each year. This playbook condenses years of research and best practices into an easy-to-follow guide to enable your company to achieve higher levels of purpose for both your employees and customers.



This playbook is designed to provide **four major elements**:

- 1 A brief educational **overview** of the San Diego nonprofit ecosystem.
- 2 A structured **methodology** to the development or evaluation of a corporate social impact program. This approach is common across any organization whether there is an existing program or starting anew or whether the business is large or small. The methodology has building blocks of activism presented in each of the four pillars of this framework. Providing a list of multiple possible activities designed to facilitate brainstorming sessions of ideas for ongoing social cause program development.
- 3 A recommended implementation **process** is provided as one possibility for corporations to embark on their social cause journey.
- 4 A list of San Diego **resources** is included that can help with additional information and references.

This playbook is not intended to be one method that fits all. Businesses are advised to adopt portions of the playbook that resonate with your company policies, procedures and corporate culture. It is intended to provide and stimulate ideas, inform the reader to the options available to an organization and introduce you to the unique thriving Cause community in San Diego.

We would appreciate your feedback and stories on how this guide helped you and your company on your journey towards social impact and becoming a force for good. We also seek to learn if you experience a Return on Social Impact (ROSI) because of your adoption of a strategic plan. Has it aided your company in attracting employees and customers or elevated your corporate brand?



The San Diego Non-profit Ecosystem

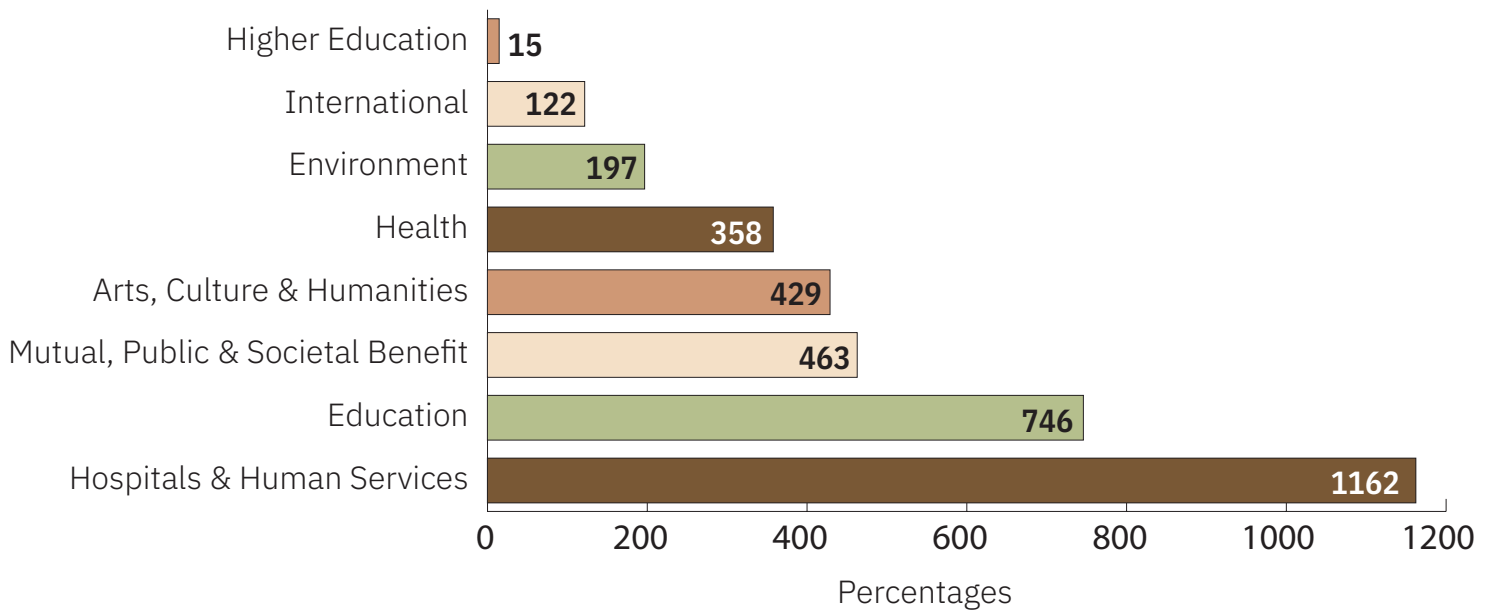
BEFORE WE DIVE into the social cause framework, we'd like to offer you a brief explanation of the San Diego nonprofit ecosystem. While there are numerous ways to characterize a nonprofit ecosystem, this playbook is utilizing data from The **Nonprofit Institute (NPI)**, a self-sustaining institute housed in the School of Leadership and Education Sciences (SOLES) at the University of San Diego. NPI provides education, training and research to strengthen organizations that help meet community needs.

In their latest 2022 annual report, **State of Nonprofits and Philanthropy in San Diego** report, they noted that **12,458 501(c)(3) charities**—an IRS code designating groups that are tax exempt—existed in San Diego County. The IRS allows the tax-deductible organizations to serve the following purposes to apply for this designation: charitable, religious, educational, scientific, literary, public safety testing, fostering national or international amateur sports competition and preventing cruelty to children or animals.

Per **www.causeiq.com**, there are 1070 private foundations in San Diego with assets of \$6 billion. These groups often get a pool of money from one family or organization and then make donations or give grants to support other charities or their own charitable efforts. The ten most active San Diego foundations based on revenue are:

- The Conrad Prebys Foundation (\$742.0 M)
- Laurie C McGrath Foundation (\$62.4 M)
- Price Philanthropies Foundation (\$37.9 M)
- Gary and Mary West Foundation (\$33.5 M)
- Tomlinson Foundation (\$28.0 M)
- Pride Resource Partners LLC (\$27.6 M)
- Kasperick Foundation (\$21.9 M)
- The Chuck and Ernestina Krteutzkamp Foundation (\$19.0 M)
- Stewardship Foundation (\$13.3 M)
- The Judith Campbell Educational and Community Foundation (\$12.7 M)

SAN DIEGO NONPROFITS BY SUBSECTOR



Although the number of nonprofits has steadily grown (22 percent growth since 2014), growth in nonprofit assets, revenue, and expenses have leveled off since 2018. Although organizations with budgets less than \$5 million comprise 91 percent of San Diego’s nonprofit sector, over the past five years, total revenue among these organizations has shrunk or remained about the same while revenue among the largest nonprofit organizations has grown.

The percentage of San Diego nonprofit revenue that comes from contributions such as government grants, individual donations or foundations is 48%. That’s about 15 percent more than the state average which means San Diego nonprofits are more reliant on outside income than the average California charity. San Diego nonprofits’ greater focus on outside dollars means they could be more vulnerable to the volatile nature of donations and grants. Hence, San Diego nonprofits have to spend more time applying for grants and seeking donations than those elsewhere.

In 2022, 77% of nonprofit leaders reported substantial or moderate increases in demand for their services. Currently, nonprofits do not appear positioned to fully meet the needs of the community. 50% of leaders reported having a waitlist for services and just 15% of respondents reported they have been able to meet all of the increased demand. The growing demands for nonprofit services in San Diego indicate this sector can and should grow. However, there is a labor shortage in the nonprofit sector due to inability to attract talent at current wage levels as nonprofits often find themselves in fierce competition with for-profits for qualified employees. Of organizations that reported job vacancies, 80 percent said it was difficult to hire qualified employees.

Involvement

Integration

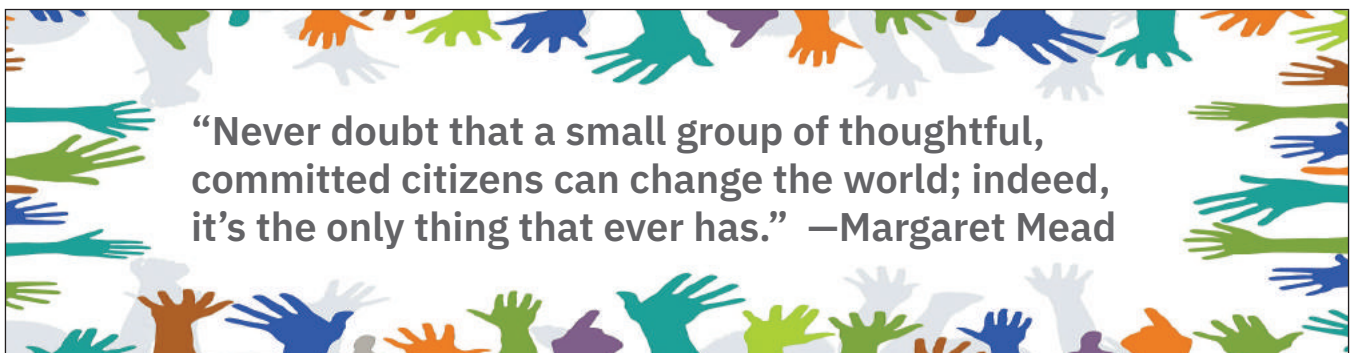
Impact

Inspiration


The Four I's — A Social Impact Framework


WHETHER YOU'RE JUST GETTING STARTED or looking to strengthen and scale your social impact and community engagement activities, this playbook can serve as a road map to drive social impact more strategically and holistically in your business and community. Best practices for playbooks provide a framework from a top-down approach to help guide the reader to all the key elements that create a sound and robust strategy. **Without a well-designed and intentional plan, random activities are hit and miss;** utilizing resources and investment without a specific desired outcome or direction in mind. In a corporation, a 3-year road map would never be designed randomly with new products or services, without a sense of a strategic direction. Your social cause plan should be treated the same. By using a simple easy-to-understand framework based on years of research, San Diego corporations can view the entirety of their social impact activities that systematically provide the depth of understanding needed to execute the plan. A robust corporate social impact program will also have the ability to quantify and evaluate the success of their plan year over year, adjusting the plan as deemed desirable.


While your company may have intentions to do good, taking actionable steps can be overwhelming with so many causes to support and ways to do so, especially with limited staff capacity and resources. That's why this playbook is boiled down to The Four I's— to simplify the approach. Thinking strategically through this framework around involvement, integration, impact and inspiration will help you understand all of the tools you have at your disposal to be a force for good.




THE FOUR I'S:

 **INVOLVEMENT:** What activities your company strategically invests its resources through volunteerism, financial giving, in-kind contributions, civic engagement.

 **INTEGRATION:** How your company strategically integrates social impact and community engagement throughout business functions, culture, policies and processes.

 **IMPACT:** How your company measures the social and business outcomes of your community engagement and social impact activities.

 **INSPIRATION:** How your company motivates and recognizes employees through storytelling to inspire each other to take action in supporting causes that are important to them.

UNLOCKING YOUR FULL POTENTIAL FOR DOING GOOD

We believe that companies, their employees, and their customers can be transformative drivers of social change in communities around the world. Companies can have the greatest impact when they work at the intersection of their community needs, company resources and priorities, and employee interests.



Understanding all three interests is critical to unlocking the full potential for your company to do good. A truly **exceptional social impact program is one that lies in the middle and addresses those intersection points.**



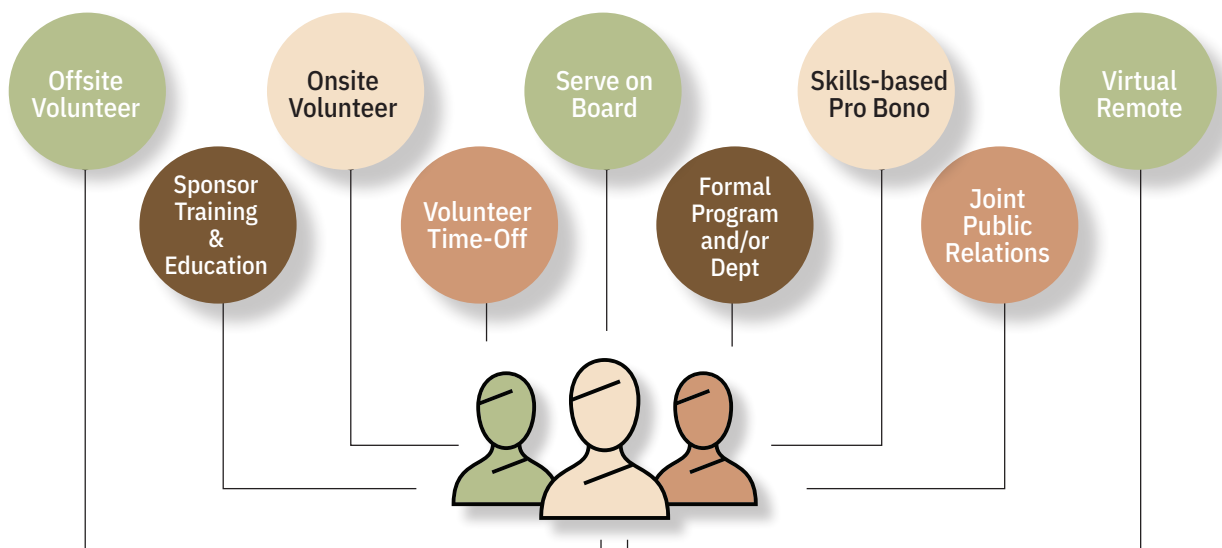
Involvement

WHAT ACTIVITIES CAN YOUR COMPANY ENGAGE its resources in to create community engagement?

QUESTIONS TO HELP IN PLANNING

- 1 Which causes and issues do your employees care most about?
- 2 Which social issues are a priority for your company and are these reflected in your giving, volunteerism, and community partnerships?
- 3 Which nonprofits could directly benefit from your products, services, or employee skills?
- 4 Do you have an initial list of nonprofits that meet your criteria and an understanding of their needs?
- 5 Do you understand how, when and why your employees like to volunteer?

NON-FINANCIAL ACTIVITIES



Purpose of Cause

NONPROFIT AND BUSINESS COLLABORATION



The **purpose of Cause is to encourage true collaboration between corporations and local nonprofits** in ways that offer the most opportunity for both; supporting the mission of the nonprofit while simultaneously building a positive brand for the business. Ultimately this supports our community in powerful ways.

SAN DIEGO EXAMPLE: Client gift giving is shifting. In lieu of a more traditional holiday client gift, such as a bottle of wine, corporations can seek ways to reflect their values. Innovative Commercial Environments, (ICE) decided to invest in the planet's future sustainability through Plant with Purpose, a non-profit that invests in communities by planting trees in some of the world's most forsaken areas. ICE purchased 200 trees from Plant with Purpose to be planted by farmers across the world and gifted to their local clients 200 tiny sapling trees to be planted in San Diego. They included a note that provided an overview of the Plant with Purpose mission to raise awareness of their work which is to break the cycle of poverty, make a positive impact on the environment, and spiritually and emotionally elevate communities around the world.

Corporate philanthropic efforts are evolving to become part of the reason for a company's existence.



Offsite
Volunteer

Hands Off—Site Volunteering

Company-wide sponsored event that supports team building and leadership development.

SAN DIEGO EXAMPLE: Interfaith invites teams to build lunches for the homeless, Salvation Army has volunteers serve Thanksgiving dinners. Feeding San Diego invites teams to package food boxes for their clients.



Onsite
Volunteer

Hands On—Corporate Site Nonprofit Activities

Done at an office including assembling hygiene kits, organizing food drives, building bikes to donate or a letter-writing campaign.

SAN DIEGO EXAMPLE: Supporting students in underserved communities is an easy activity when the employer provides back packs, employees and employer both bring in school supplies and then everyone forms an assembly line to pack each back pack. This can be done over a lunch hour with the end result of donating 25-100 filled back packs for schools to give to students.



Skills-based Pro Bono

Skills based and Pro Bono Volunteering

Leveraging professional skills of employees individually, a high-impact opportunity when matched with nonprofits’ needs.

SAN DIEGO EXAMPLE: San Diego County Credit Union (SDCCU) performs financial literacy workshops in underserved communities.



Virtual Remote

Virtual and Remote Volunteering

Services performed by volunteers without physical presence. Examples include translation services, virtual mentoring, digitally mapping of humanitarian organizations and managing crisis calls.



Serve on Board

Serving on Nonprofit Boards

Serving on the board of a nonprofit greatly benefits all entities. Nonprofits can leverage employee for-profit experience for improved operations and volunteers can build their personal brand and network.

SAN DIEGO EXAMPLE: NAIOP is a nonprofit that serves the commercial real estate (CRE) industry. They’ve created a Developing Leaders (DL) program to foster CRE leadership development. The DL leaders that serve on the DL board are asked to participate in the primary board meetings where they have the opportunity to learn valuable skills and make connections with highly respected San Diego CRE leaders. This benefits the DL’s but it also benefits NAIOP as they intentionally cultivate tomorrow’s leaders.



Sponsor Training & Education

Sponsor Training and Education Activities

Most employees are unaware of the San Diego non-profit ecosystem. Sponsoring an educational “Lunch and Learn” or engaging a non-profit in a business event can spark motivation and initiatives.

SAN DIEGO EXAMPLE: As a local smart irrigation manufacturer, Calsense actively participates in an annual event named “Lagoon Kahuna” in collaboration with the Agua Hedionda Lagoon Foundation. This event not only involves a lagoon cleanup but also incorporates various team-building activities that contribute to the foundation’s cause. By engaging in such activities, employees are motivated and inspired to sustain their involvement with this organization or others that hold local significance to them.

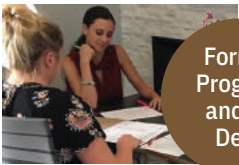


Volunteer Time-Off

Volunteer Time Off (VTO)

Paid release time, allows employees to volunteer “on the clock,” or flex-time policy to volunteer during the work day.

SAN DIEGO EXAMPLE: Calsense actively supports VTO by offering 32 hours per year (8 hours per quarter) per employee. Each employee is encouraged to make a meaningful impact for causes they care about while gaining valuable skills, building community connections, and experiencing personal growth. Additionally, Calsense recognizes that supporting employee volunteering leads to a more engaged and motivated workforce, fosters a positive company culture, and reinforces their commitment to social responsibility and making a difference in San Diego.



Formal Program and/or Dept

Program Structure and Management

Create a formal corporate program and/or dedicated department that can lead the corporation on social cause programs



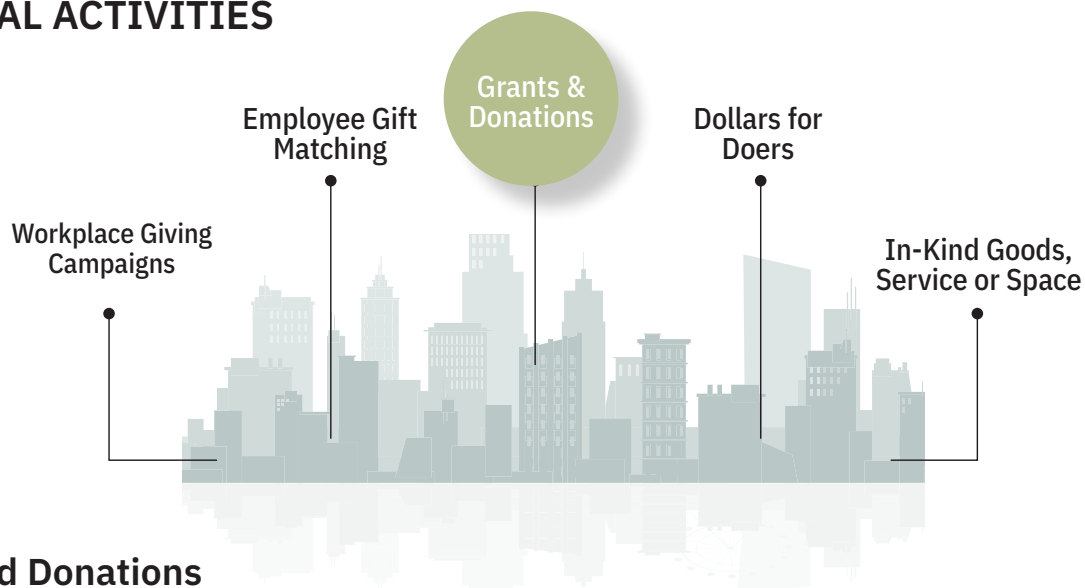
Joint PR

Joint PR Collaboration

Public promotion of the corporation and specific non-profits to increase public awareness and prompt individual donations.

SAN DIEGO EXAMPLE: At the grand opening of their new showroom, previously noted furniture dealership ICE invited a local dance non-profit, transcendANCE (tD), to perform. This was great PR for tD as they performed in front of an audience of more than 400 attendees and set-up a table with their promotional materials to further expand knowledge of ICE mission. This partnership benefitted both and ICE and tD exemplifies that “doing well and doing good need not and should not be mutually exclusive”.

FINANCIAL ACTIVITIES



Grants and Donations

Most straightforward way to support nonprofits and social causes including unrestricted donations, grants to specific programs, and event sponsorships.

SAN DIEGO EXAMPLE: Many organizations host fundraisers such as golf tournaments, game night, conferences, etc., where local companies are asked to sponsor the event. The Cause Conference is an example of local companies such as LAZ Parking contributing funds in exchange for brand exposure.

Workplace Giving Campaigns

Charitable contributions through payroll deduction, including team competitions to see who can raise the most money.

SAN DIEGO EXAMPLE: At Sharp HealthCare, July marks the kickoff of their Employee Giving campaign, **ENVISION** which is a Sharp HealthCare campaign that includes initiatives and projects across the system and is the most comprehensive health care endeavor in San Diego's history. By investing in technology, facilities, innovation, research, and people, Sharp is poised to serve San Diego for generations to come to include \$250 million in philanthropy and supporting \$2 billion in investments over the next decade.

Each year, thousands of Sharp HealthCare employees join the Foundations in making contributions to Sharp through payroll deduction, gifts of Paid Time Off (PTO) and cash gifts. Many choose to join the "Hour Club" donating the equivalent of one hour of their pay per pay period. Sharp employees have led the way in many campaigns and initiatives contributing more than \$15 million and more than 100,000 hours of Paid Time Off (PTO).

Employee Giving has grown to more than \$1 million each year from countless generous donors. The ENVISION total for employee giving is more than \$3.5 million. This is a prime example of employee and employer engagement that leads to significant community benefits.

Employee Gift Matching

Match gift programs that provide a “matching” (1:1 or greater) financial contribution to an employee’s donation.

Dollars for Doers

A company makes a financial contribution to a nonprofit where an employee, or group of employees, volunteers.

In-Kind Goods, Services or Space

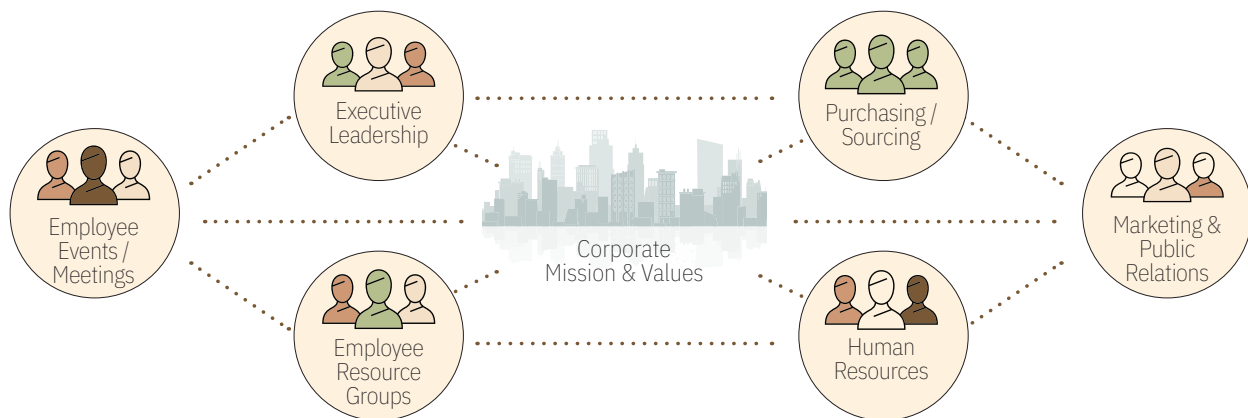
In-kind goods could include products, supplies and materials, technology (hardware and software), meeting and event venues and advertising/PR space, professional and administrative services, printing and mailing support and even transportation services.

SAN DIEGO EXAMPLE: SeaWorld San Diego provides park tickets to assist non-profit charitable organizations and schools in fundraising efforts. Also, a great place to find nonprofits in need of an organization’s products and/or services is the Donation Match website.



Integration

HOW YOUR COMPANY STRATEGICALLY INTEGRATES social impact and community engagement throughout business functions, culture, policies and processes.



QUESTIONS TO HELP IN PLANNING

- 1 Which department is best suited organizationally to take the lead role and do they have the resource capacity for the company's social impact program? Or do you need to create an internal committee to create the program?
- 2 Which department is the best fit to provide communication channels for both internal and external audiences?
- 3 Which department and/or personnel has the most experience with social cause programs?
- 4 Which employee groups could support your community engagement and social impact work?
- 5 How can you inspire your leaders to champion your community engagement programs versus merely become participants?

HR

Employee and community engagement strategies often stem from this department as they have a pulse on the people and culture of the company.

Employee Events and Meetings

Incorporating volunteering and community engagement into existing employee events and meetings is a great way to build purpose into your company's culture and deepen your support for your nonprofit partners. Examples might include having a food or book drive as part of your holiday party, assembling hygiene kits or bikes to donate, collecting towels and blankets for homeless shelters. ICE had a Christmas 'Giving Tree' decorated with photos of potential donations to be made to various charitable organizations on behalf of ICE employees. ICE employees each selected one 'donation ornament' by signing their name on the photo and leaving it on the tree.

Executive Leadership and Board Engagement

With engaged leadership and input from the board, advocating for greater investments in your program becomes easier and your strategy will have a higher probability of success. One way to keep your leadership and board informed and involved is to ensure that community engagement is a standing agenda item at all executive, company-wide and board meetings.

Mission and Values

No longer is simply providing a good or services considered the acceptable standard for business. A company's purpose must align with a greater community benefit. Formalizing this commitment publicly can raise the expectations to do good in authentic and significant ways and generate greater support and buy-in from stakeholders such your employees, board members and customers. When employees are asked to help craft the values, higher purpose statement of mission, they likely will better embrace and live those values. Displaying them prominently in signage, on screen savers, framed photos on each desk or in custom made wallpaper keeps them top of mind for employees.

Employee Resource Groups

Engaging your employee resource groups (ERGs) as stakeholders with your community engagement and social impact work can provide an effective way to support causes and issues that matter most to your employees. Not only can they provide valuable feedback and ideas, they can also champion causes and scale your efforts in planning their own community engagement projects and learning experiences for the company.

Marketing and Public Relations

Social cause Marketing and Public Relations can be powerfully leveraged to create a meaningful and lasting impression in the minds of consumers. By integrating social impact initiatives into marketing strategies, companies can align their brand with positive change and foster a sense of purpose. By highlighting their commitment to social and environmental causes, companies can not only attract socially conscious customers but also strengthen customer loyalty and brand reputation. Through storytelling and targeted campaigns, companies can communicate their social impact efforts and inspire consumers to become active participants in creating a better world. A note of caution, do not engage in social impact initiatives simply for a PR benefit; ultimately this is discoverable and the consequences can be highly detrimental to your corporate brand!



Impact

UNDERSTANDING AND MEASURING THE SOCIAL AND BUSINESS IMPACT of your community engagement work is integral to ensuring the greatest impact from your investments of human and financial capital.

QUESTIONS TO HELP IN PLANNING

- 1 Which impact metrics are you currently tracking for your community engagement work?
- 2 Have you discussed with your nonprofit and community partners how they track measurements that quantitatively and qualitatively drive social outcomes?
- 3 Do you understand how your social impact work and community engagement programs may have a quantifiable positive impact on different parts of your business and are you tracking this?
- 4 What are you doing with the impact data you track? Is it reported to internal and external stakeholders?
- 5 How are you using your impact data to make improvements to your social impact and community engagement programs?

EXAMPLES ARE NOTED BELOW

Metric Type	Social Impact Example	Business Impact Example
Quantitative	Additional transitory housing with a % increase of homeless persons that graduated from transitory housing.	Less number of homeless that negatively affects surrounding local businesses
Quantitative	Predefined satisfaction metrics as performed by survey	Surveys from local businesses and homeless population
Emotional	Success stories that provide an emotional list for the cause	Increase in number of volunteers for a specific cause

Once you determine the community and business metrics you want to track, start to compile this information into a dashboard report. Centralizing and organizing these metrics will not only reveal greater insights, it will also help you communicate the value and impact of your volunteerism and community investments to key stakeholders. Depending on your company size and budget, you might also consider a platform specifically built for employee engagement that can greatly help you manage and track your philanthropic and community programs.



VOLUNTEERING AND ENGAGEMENT: finding volunteer opportunities, volunteer event management, hours recording, employee fundraising, surveys, impact measurement are some examples.

EMPLOYEE GIVING: matching gifts, payroll deduction, in-kind donation requests, tracking and reporting giving.

COMPANY GRANTS: funding applications, funding disbursements, grant recipient reports, dashboard reporting and report management tracks activity.



Inspiration

HOW YOUR COMPANY STRATEGICALLY LEVERAGES employee recognition and storytelling to inspire others to take action in supporting the causes and issues they care about.

QUESTIONS TO HELP IN PLANNING

- 1 How are you celebrating the work of your employee volunteers and those who volunteer in their communities outside of company-sponsored events?
- 2 Have you asked your nonprofit and community partners how you can help amplify their work and tell their stories?
- 3 Is your company and your employees engaging a hashtag to create visibility for your community engagement work?
- 4 What content are you capturing at your volunteer events? Is it documenting a project or telling a story of impact?
- 5 How does your community engagement show up in external communication and marketing materials?





RECOGNITION — Recognition includes all the ways an organization, manager or peer is able to acknowledge, validate, praise and appreciate the commitment, hard work and success of colleagues. Building a volunteer recognition strategy involves thanking employee volunteers and volunteer leaders in a way that publicly acknowledges their contributions. An effective volunteer recognition strategy has the right mix of formal and informal efforts along with incentives and rewards.

REWARDS AND INCENTIVES — Rewards and incentives can also be leveraged as part of your recognition strategy. A reward is an award given in recognition of service, effort or achievement. It can be tangible like a certificate, gift card or merchandise, or an intangible perk such as additional paid time off to volunteer, the opportunity to meet with senior leaders or an article written to acknowledge the efforts of a stellar volunteer. Companies that place a great deal of value on volunteer efforts might tie a percentage of annual compensation to those efforts.

An incentive provides motivation or encouragement to complete certain actions or increase effort to meet specific objectives. Incentives are typically time-bound, measurable and associated with a specific reward. The achievement of an incentive may also be accompanied by recognition.

STORYTELLING — Take pride in celebrating and showcasing your community engagement program, employee volunteers and nonprofit partners. It is important that this storytelling take place both internally and externally, and also year-round (i.e., not simply during volunteer projects). Whether through social media, internal newsletters, emails from leadership, press releases or annual/CSR reports, it's important to communicate the “why” when telling a story of impact. Why does your “volunteer of the month” feel so passionate about supporting their community or advancing a social cause? Why is the work of your nonprofit partner critical to addressing community needs? Why do they need additional volunteer support and resources to carry out their mission?



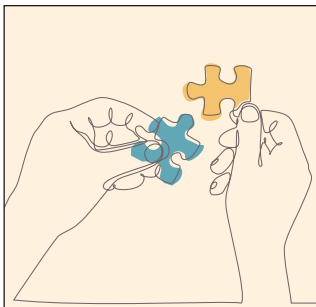
Why Social Impact is Important to Businesses

IN TODAY'S RAPIDLY CHANGING WORLD, the concept of business success must extend beyond financial gains. According to one consumer survey from the market researcher Forrester, 55% of Gen Zers indicated that a company's social-responsibility reputation either influences or highly influences whether or not they buy from them. This is more than double the rate of Baby Boomers. To attract and retain highly engaged employees as well as clients, for-profit businesses need to understand and recognize the importance of integrating social impact into their operations.

The below summary explores the reasons why social impact is vital for resilient, healthy for-profit businesses; highlighting the benefits it brings to various stakeholders.

- 1 Enhancing Corporate Reputation and Brand Image:** In an era where consumers are increasingly conscious of the social and environmental impact of their purchasing decisions, businesses that prioritize social impact can differentiate themselves from their competitors. By aligning their values and actions with social causes, companies enhance their reputation, build trust with customers, and foster brand loyalty. Positive brand perception often translates into increased market share and long-term sustainability.
- 2 Attracting and Retaining Talented Employees:** In a competitive job market, attracting and retaining talented employees is crucial for a company's success. Millennial and Gen Z workers, in particular, seek meaningful work that contributes to a greater purpose. By incorporating social impact initiatives into their business models, for-profit companies can appeal to these generations and attract top talent. Employees are more engaged and motivated when they feel their work is making a positive impact on society, leading to higher productivity and lower turnover rates.

- 3) **Mitigating Risks and Ensuring Long-Term Success:** By proactively addressing social and environmental issues, for-profit businesses can mitigate risks and enhance their resilience in the face of changing regulatory landscapes and shifting market preferences. Neglecting social impact can lead to reputational damage, legal and financial penalties, and disrupted operations. Companies that integrate social impact into their core strategies are better positioned to navigate these challenges and secure long-term success.
- 4) **Creating Shared Value and Sustainable Development:** Social impact initiatives provide opportunities for-profit businesses to create shared value, which is the idea that economic value can be generated alongside social and environmental value. By addressing societal challenges through innovative business solutions, companies can contribute to sustainable development while simultaneously driving financial growth. This approach fosters collaboration between businesses, governments, and communities, promoting inclusive economic growth and long-term prosperity.
- 5) **Building Stronger Relationships with Stakeholders:** Social impact initiatives enable for-profit businesses to build stronger relationships with stakeholders, including customers, employees, investors, suppliers, and local communities. Engaging stakeholders in meaningful ways can lead to increased customer loyalty, improved employee morale, enhanced investor confidence, and more supportive relationships with suppliers. Collaborating with communities through social impact initiatives also strengthens the social license to operate, fostering trust and positive partnerships.
- 6) **Responding to Consumer Demand and Market Trends:** Consumers are increasingly demanding that businesses operate responsibly and address pressing social and environmental challenges. By embracing social impact, for-profit companies can align with these consumer preferences, ensuring their products and services meet market demands. Understanding and responding to consumer expectations can lead to new business opportunities, increased sales, and improved competitiveness.
- 7) **Driving Innovation and Operational Efficiency:** Social impact initiatives often drive innovation within for-profit businesses. By integrating sustainability and social considerations into their processes, companies are compelled to think creatively, find new solutions, and develop more efficient practices. This innovation can lead to cost savings, improved operational efficiency, and a competitive advantage in the market.



By embracing social impact, these companies can enhance their reputation, attract top talent, mitigate risks, contribute to sustainable development, build stronger relationships, respond to consumer demand, and drive innovation. **The integration of social impact into the core strategies of for-profit businesses is no longer a mere option but a necessary path to long-term success and a positive legacy.**



Three Major Phases to Success

DEVELOPING A SOCIAL CAUSE PROGRAM typically involves three essential phases: **definition, execution, and monitoring**. Cause San Diego can assist in each of these phases or a combination of these phases for the company social cause program.



DEFINITION PHASE: In this initial phase, the social cause program is defined and shaped. It involves the following steps:

- A) Goal Setting:** Clearly define the objectives of the program. Include employee participation to determine what social issues are important to your staff and what issues the program you collectively adopt aims to address. Ascertain what impact the program and your company desire to make.
- B) Research and Analysis:** Conduct research to gain insights into the identified social issue. Understand the root causes, existing initiatives, and potential collaborations with relevant stakeholders.
- C) Strategy Development:** Develop a strategic plan that outlines the program’s key components, target audience, activities, and desired outcomes. Identify the resources required, including budget, team, and partnerships.

EXECUTION PHASE: Once the program is defined, it moves into the execution phase where the planned activities are implemented. This phase involves the following steps:

- A** Program Implementation: Put the defined strategies into action. Execute the activities and initiatives outlined in the program plan. This may include organizing events, implementing community projects, partnering with nonprofits, or launching cause-related marketing campaigns.
- B** Collaboration and Stakeholder Engagement: Foster partnerships with relevant organizations, community groups, and individuals. Engage all stakeholders to include employees, customers, vendors/suppliers, and the local community to maximize the program's impact and create a sense of ownership and participation.
- C** Communication and Awareness: Effectively communicate the program's goals, activities, and impact to your identified target audience. Utilize various channels, including social media, PR, and marketing campaigns to raise awareness and engage with stakeholders. Storytelling and compelling messaging can help generate interest and support for the cause.

MONITORING PHASE: The monitoring phase focuses on assessing and evaluating the program's progress and impact. It involves the following steps:

- A** Data Collection and Analysis: Collect relevant data to measure the program's outcomes and impact. This may include quantitative data, such as the number of beneficiaries reached or funds raised, as well as qualitative data, such as testimonials and stories of impact.
- B** Evaluation and Adjustment: Evaluate the program's effectiveness against the defined goals and objectives. Identify strengths, weaknesses, and areas for improvement. Use this evaluation to make adjustments to the program, if necessary, to enhance its impact and effectiveness.
- C** Reporting and Communication: Prepare reports and share the program's progress, achievements, and impact with stakeholders. Transparently communicate the results to build trust and maintain accountability. This also helps in garnering support and attracting new partners or sponsors.

By following these three phases—*definition, execution, and monitoring*—organizations can develop and implement robust social cause programs that make a positive and lasting impact on the targeted social issue.

With Cause San Diego's extensive expertise and network, we offer comprehensive guidance and resources to help businesses create and implement successful initiatives. Cause San Diego can help initiate a new program by conducting thorough assessments to understand a company's values, goals, and target audience. Based on this information, we collaborate with the company to identify relevant social impact areas and develop a strategic road map. We provide guidance in selecting appropriate nonprofit partners, designing engaging campaigns, and measuring the impact of the programs. Cause San Diego also assists in integrating social impact efforts into the company's marketing and communication strategies, ensuring a consistent and authentic message. Through our expertise and connections in the social impact sector, Cause San Diego helps for-profit companies maximize their positive social footprint, build brand reputation, and establish meaningful, authentic connections with their employees, customers and communities.

San Diego Resources



Cause San Diego

An organization focused on providing resources and guidance to build bridges between the for-profit and nonprofit sectors.

- EMAIL: info@causesandiego.org
- URL: www.causesandiego.org



The Nonprofit Institute

NPI provides education, training and research to strengthen organizations that help meet the needs of the San Diego community.

- EMAIL: EmilyYoung@sandiegoedu.com
- URL: www.thenonprofitinstitute.com



San Diego Nonprofits is a charity platform that allows San Diego residents to easily discover local charities who perform amazing services throughout the community.

- EMAIL: info@sandiegononprofits.net
- URL: www.sandiegononprofits.net



DonationMatch is a website that provides an easy process for businesses to provide higher brand visibility by donating their products for social impact organizations.

- PHONE: (858) 663-0080
- EMAIL: Renee@donationmatch.com
- URL: www.donationmatch.com



HandsOn San Diego is an organization that partners with agencies that need volunteers or engage companies in socially responsible team building activities.

- EXECUTIVE DIRECTOR: Lisa Lindgren
- VOLUNTEER ENGAGEMENT MANAGER: Jessie Case
- EMAIL: info@handsonsandiego.org
- URL: www.handsonsandiego.org



North County Philanthropy Council brings nonprofit professionals, volunteers, donors and business together for one purpose – to uplift our community. We know there is power in working together and by connecting and sharing knowledge, we strengthen our nonprofit leaders and professionals. These connections are valuable and vital to enhance philanthropic impact in our community.

- MANAGING DIRECTOR: Monica Martinez
- EMAIL: monica@ncphilanthropy.org
- URL: www.northcountyphilanthropy.org



San Diego Gives 2023 is a year-round nonprofit sustainability project that culminates in a Day of Giving on Thursday, September 7 and Day of Service on Friday, September 8.

- EMAIL: info@sandiegogives.org
- URL: www.sandiegogives.org



Nonprofit Solutions originally only offered workshops and training for nonprofits and individuals working in/volunteering for nonprofits but has expanded to training programs that support social impact within the for-profit sector.

- EMAIL: npsolutions@npsolutions.org
- URL: www.npsolutions.org

Social Impact Planning Checklist

1 INVOLVEMENT: Strategy & Tactics Notes

Employee Engagement & Volunteerism:

Hands On (Offsite) Volunteering	
Hands On (Workplace) Volunteering	
Skills-based and Pro Bono Volunteering	
Virtual and Remote Volunteering	
Board Training and Education	
Volunteer Time Off	
Program Structure and Management	

Financial Contributions:

Grants and Donations	
Workplace Giving Campaigns	
Employee Gift Matching	
Dollars-for-Doers	

In-Kind Contributions:

In-Kind Goods	
In-Kind Services	
In-Kind Space	

Public Leadership & Advocacy:

Advocacy and Voice	
Elections and Voter Support	

2 INTEGRATION: Strategy & Tactics Notes

Business Functions and Departments:

Human Resources	
Employee Events and Meetings	
Marketing and PR	
Purchasing and Sourcing	

Leadership and Culture

Mission and Values	
Employee Resource Groups	
Department Goals and KPIs	

3 IMPACT: Strategy & Tactics Notes

Social Impact Metrics	
Business Impact Metrics	
Measurement Tools and Strategies	

4 INSPIRATION: Strategy & Tactics Notes

Recognition	
Rewards and Incentives	
Storytelling	

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Reach out to us at:
info@causesandiego.org
to learn more on how to
get your social impact
programs started.