

# WISE GIVING™

GUIDE

BBB WISE GIVING ALLIANCE : SPRING/SUMMER 2019

## DONOR HANDBOOK

# 2019





A Publication of the  
BBB Wise Giving Alliance

The *Wise Giving Guide* is published three times a year to help donors make more informed giving decisions. This guide includes a compilation of the latest evaluation conclusions completed by the BBB Wise Giving Alliance.

If you would like to see a particular topic discussed in this guide, please email suggestions to

[guide@give.org](mailto:guide@give.org)

or write to us at the address below.

## SPRING / SUMMER ISSUE 2019

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# INSIDE

## 2

## Donor Handbook 2019

## 8

## List of Nationally Soliciting Charities

How to Read the List of National Charities **6**

Q&A about the Wise Giving Guide **51**

National Charity Seal Program **51**

BBB Standards for Charity Accountability **52**

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# president's MESSAGE

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To help our readers continue to make wise giving choices, we've brought back one of our most popular features: The Donor Handbook. In our Spring / Summer 2019 edition of the *Wise Giving Guide*, we hope to provide guidance on several philanthropic topics of interest.

We'll look at charity annual reports, which can provide donors a quick way to access basic facts before making a giving decision. We'll also address data privacy to inform donors what to look for when sharing personal information with a charity. With the arrival of spring, we also thought it would be a good time to dive into athletic fundraising events such as walkathons and charity runs.

If you're already thinking about your summer vacation, BBB WGA provides some tips on volunteer vacation opportunities. Finally, this latest edition of the *Wise Giving Guide* offers a discussion of women and their growing role in philanthropy.

We hope you enjoy the Donor Handbook. More importantly, we hope you can use it to continue to make smart giving choices. As always, we appreciate your continuing support.



H. Art Taylor, *President & CEO*



# 2019 DONOR HANDBOOK

For this issue of the *Wise Giving Guide*, we want to provide some insight and advice on a variety of charity topics and throw in a little fun too. We hope you enjoy the spring and summer weather while also continuing to express your generosity to the charities and causes you care about most.

## Get a glimpse: charity annual reports

One of the best sources of information on charities is the annual report. Many charities include the most recent annual report, and often those from previous years, in the “about us” section of their website, and it provides an easily digestible snapshot of the organization’s work from the previous year. As a donor, you likely want to get to the nuts and bolts of the charity you are considering supporting as quickly as possible, and may not have time to get into the minutia found in audited financial statements or IRS Form 990s. A well-produced annual report can help you do just that.

BBB Charity Standard 16 calls for charity annual reports to include specific financial information, including total income, total ending net assets, and program, fundraising and administrative expenses. An annual report will often include graphs to help you identify these items more easily. The Standard also calls for annual reports to include the charity’s mission statement, a roster of the organization’s board members, and a summary of program accomplishments from the previous year, which is often not found in the audited financial statements or 990, or at least not in much detail. Pictures and narrative summaries of program service accomplishments included in annual reports can be an effective tool

to connect donors to the actual “boots on the ground” work performed by charities, from delivering goods to victims of natural disasters to digging wells for fresh water in Africa.

Unfortunately, BBB Wise Giving Alliance finds that Standard 16 is one of the most frequently unmet standards. We believe charities should create an annual report each year (annually!) to take advantage of this relatively easy way to demonstrate transparency and share an overview of their work with donors. While many annual reports have a lot of flash and gloss, that is not necessary. What’s important is that the charity tells its story to donors, and this can be done in as little as a page or two.

An annual report should be easy to locate on a charity’s website, and if it isn’t, don’t hesitate to let the charity know and request a copy.



## Protect yourself: data privacy

While recovering from the holiday season earlier this year, many of us may have overlooked *Data Privacy Day* on January 28. Led by the National Cyber Security Alliance, *Data Privacy Day* helps create awareness of the importance of data security, including protecting personal information and avoiding data breaches. The giving public communicates with charities through websites, email, and social media, and it is always important to consider what policies each charity has in place to protect your personal information. BBB Wise Giving Alliance has long been concerned with donor privacy, as evidenced by our Standard 18, which calls for charities to disclose in their website privacy policy:

- What information is being collected and how it will be used?
- How to contact the charity to review personal information and to make corrections?
- How to inform the charity if you don't want your personal information shared?
- And what security measures does the charity have in place to protect personal information?

The above four principles of **notice**, **access**, **choice** and **security** provide a good lens through which donors can view data privacy. A good habit would be to begin looking at the privacy policies of charities before you give. BBB Wise Giving Alliance calls on charities to make these policies “clear, prominent, and accessible.” The privacy policy can often be found at the bottom of the homepage or “footer” or on the donation page. Once you’ve located the privacy policy, try to identify the four elements. Some policies will be clear and concise, others too simple or filled with legal jargon that can be confusing.

If you have any questions or concerns, don't hesitate to reach out to the charity to find out how they protect your information, especially in an age in which cybercriminals are becoming increasingly sophisticated. For additional information on data privacy, please go to: [bbbprograms.org/insights](http://bbbprograms.org/insights)

## Walking for a cause: athletic fundraisers

As the weather warms, we're sure to start seeing advertising for charity walks, runs, and a host of other events offering to let us sweat it out with family and friends for a good cause. Such events have been around for close to fifty years. The March of Dimes' *March for Babies*, which began in 1970, is one of the most prominent examples. *Susan G. Komen's*

*Race for the Cure* began with a humble 800 participants in Dallas, TX in 1983, and is considered the largest fundraising event to support breast cancer. Now there are countless similar events to support charities, enabling donor-athletes to choose among a variety of causes or even the level of athletic prowess required for participation.



However, the Peer-to-Peer Professional Forum's *Fundraising Thirty* report indicates that donations from such events are declining. According to the report, donations have decreased for six years in a row, with 2018 showing a 2.7% decrease from 2017, though much of this can be attributed to a planned scaling back of one of the biggest annual events. *Fundraising Thirty* includes walkathons and running events from some of the country's most notable charities, but also includes some more creative events such as dance marathons, head shaving events, bowling, and even a video game tournament supporting the Children's Miracle Network.

Even as these charity events have taken a hit in recent years, they remain a visible way to rally support for a cause and are unlikely to go away any time soon. Before choosing to participate, however, we encourage you to vet each charity involved with the event as you would any other organization soliciting you for a donation. Once you've established that the organization benefiting from your participation is one you trust, be mindful to read the fine print to look for costs associated with participation, the activities to be supported, the amount, if any, the organization expects you to raise, or other applicable rules or regulations. This will help to ensure the best possible experience for you and the charitable mission you hope to support.

Many runs and walks include a peer-to-peer component in which participants leverage their social networks on behalf of the charity. Just as donors need to vet a charity before participating in a walk, run, or other event, so too should you vet a charity when approached by others for donations to support their efforts. The same advice holds true whether a coworker asks for your support over lunch or an old friend reaches out via social media.

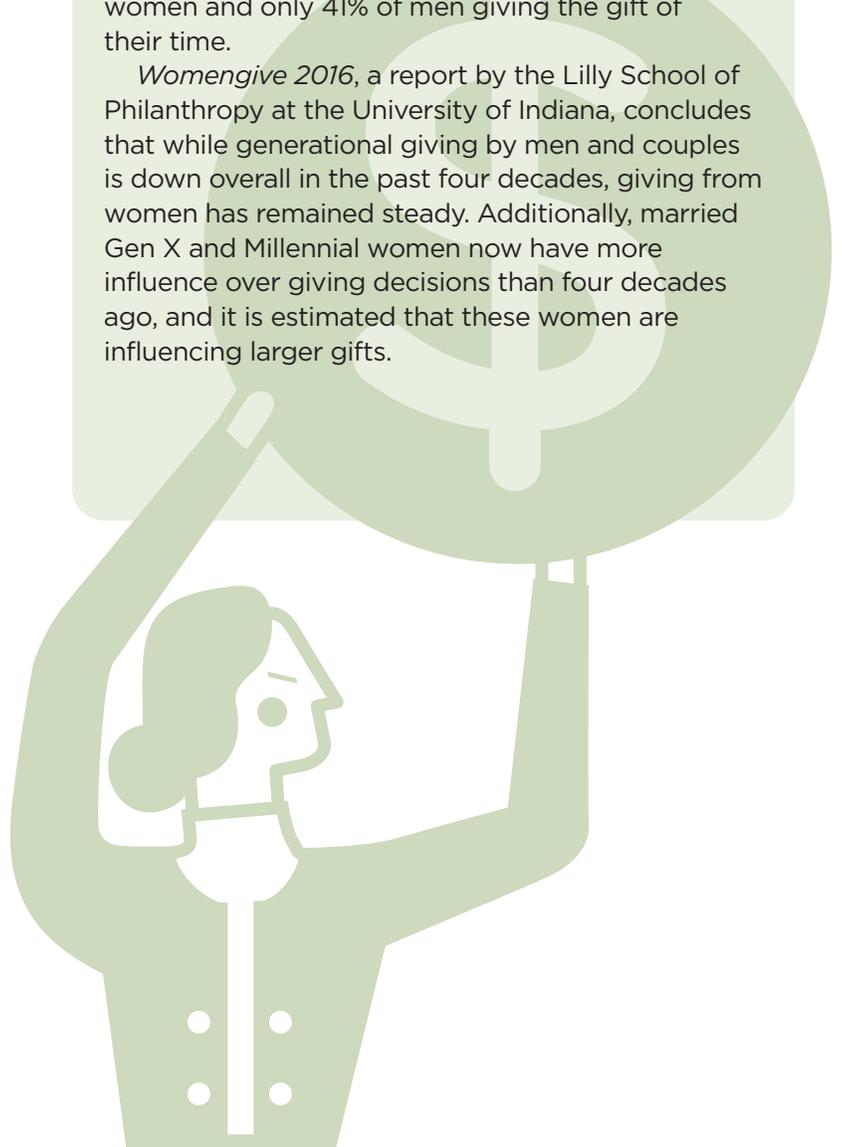
Also, whether you are a participant or simply cheering on a friend or family member, make sure any merchandise you purchase at events, such as t-shirts or water bottles, clearly identifies the portion that goes to the charity.

## Women and philanthropy

Friday, March 8th was International Women's Day, and women's issues have certainly been at the forefront of popular consciousness in recent years. Women-focused philanthropy also has grown. As reported in *Women and Giving*, published by Rockefeller Philanthropy Advisors, there are over 160 women's funds in the U.S. and the around the world. *Women and Giving* further states that "Not every woman donor, of course, will prioritize women's and girl's issues in her giving. But the story of the development of women's funds speaks to the potential for women to seek more balance in a vital sector of society, philanthropy, which has been controlled disproportionately by men."

In addition, studies have demonstrated the strong generosity of women. According to the *2018 U.S. Trust Study of High Net Worth Women*, 93% of well-heeled women gave to charity compared to 87% of men. The same study offers a larger disparity over volunteering, with 57% of women and only 41% of men giving the gift of their time.

*Womengive 2016*, a report by the Lilly School of Philanthropy at the University of Indiana, concludes that while generational giving by men and couples is down overall in the past four decades, giving from women has remained steady. Additionally, married Gen X and Millennial women now have more influence over giving decisions than four decades ago, and it is estimated that these women are influencing larger gifts.



# Planning your next vacation?

As spring arrives, it's time to start thinking about resting and relaxing, perhaps at the beach or in the mountains. Another option to consider, however, is the volunteer vacation. Such volunteer vacations are available domestically and abroad, and might include building shelters in impoverished communities, drilling wells for those without fresh water, and teaching, among many others. While these opportunities can give adults the chance to put their money where their mouth is, volunteer vacations can also be a way to teach young people lessons of a lifetime. Below are a few things to keep in mind when considering giving up some of your vacation for the greater good:

- Check the charity providing the volunteer opportunity to see if they meet the 20 **BBB Standards for Charity Accountability**
- If traveling abroad, find out the appropriate immunizations you might need
- Read the fine print to figure out if you are responsible for paying for your own transportation
- Figure out the physical demands of the opportunity to make sure you commit to one that matches your physical abilities
- Find out the specifics of the living conditions you will experience, especially if you have any special needs
- See if your medical insurance will cover you while abroad

## Celebrity match

While endorsements or major gifts from celebrities are not usually the most critical element of a charity's success, they can certainly help move the needle. In an era in which celebrities are only a tweet or Instagram post away from huge numbers of fans, it doesn't hurt to have some big names on your side. See if you can match the celebrity with the description of their charity work.

Oprah Winfrey **A**

**1** Co-founded Water.org, a charity dedicated to providing financial solutions to enable access to clean water and sanitation.

Serena Williams **B**

**2** As a birthday gift, received plans for a special center in his or her name at the Dian Fossey Gorilla Fund.

Sir Paul McCartney **C**

**3** Became a UNICEF Goodwill Ambassador in 2011.

Sir Elton John **D**

**4** One of the world's most charitable stars, this individual has focused on education, with massive donations to schools and museums, but has also made significant contributions to Habitat for Humanity and Save the Children.

Marlo Thomas **E**

**5** This icon's pet cause is ridding the world of minefields.

George Clooney **F**

**6** Started a foundation in 1992 dedicated to AIDS prevention, educational programs, direct care and support services.

Matt Damon **G**

**7** This Emmy, Golden Globe, and Grammy award winner is also the National Outreach Director of St. Jude Children's Research Hospital.

Ellen DeGeneres **H**

**8** This star focuses on human rights issues, especially in Sudan.

(Answer key: A4, B3, C5, D6, E7, F8, G1, H2)