UNDERSTANDING NONPROFIT AND FOR-PROFIT CULTURES
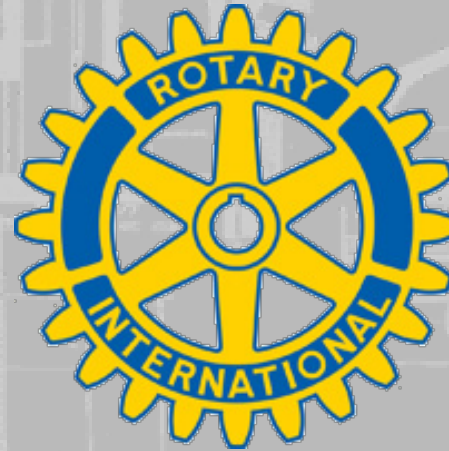

Partnerships in NRM PROSPECT Course

US Army Corps of Engineers ®

Goals

- Review both the 501(c) non-profit and agency persona and their individual drivers

- Understand what non-profits look for in partnerships

- Examine ways to utilize and integrate strengths of partners

- Understand how non-profit and for profit partners can provide advocacy/lobbying

- Learn why for-profit corporations and private individuals give

Nonprofit Vs. Not for Profit

• Nonprofits are formed explicitly to benefit the public good	• Not for profits exist to fulfill an owner's organizational objectives
• Can have a separate legal entity	• Cannot have a separate legal entity
• Run like a business and try to earn a profit, which does not support any single member	• Considered "recreational organizations' that do not operate with the business goal of earning revenue
• May have employees who are paid, but their paychecks do not come through fundraising	• Run by volunteers
• Grants 501(c)(3) status by the IRS	• Governed by IRS tax code 501(c) but depending on their purpose, could fall under a different section

Non-Profit Culture vs. USACE

Non-Profit

- Articles, By-laws

- Strategic Plan

- Initiatives Plan

- Funding Plan

- Impact

USACE

- Regulations

- Operations Plan (OMP)

- Implementation Strategy

- Budget

- Execution

Make-up of Non-Profit vs. USACE

Non-Profit

- Board of Directors
- Executive Director
- Staff
- Members
- Volunteers

USACE

- Division/District Commander
- Park Manager
- Rangers
- Visitors
- Volunteers

Funding for Non-Profit vs. USACE

Non-Profit

- Contributions – donations; grants

- Earned Revenue – sales; service fees

USACE

- Congress- Appropriations

- Contributions

What Does The Non-Profit Want?

- Mission fulfillment – **For Impact**!

- Opportunity to expand its resources

- Respect: 2 way partnership – not your ATM

- Community recognition

- Long term relationship

Common <u>Myths</u> About Non-Profits

- Non-profits are not accountable

- Non-profits are not businesses

- Non-profits cannot make a profit (It's not really not-for-profit, but instead = For impact)

- Non-profits can't lobby

Brochure made by chamber of commerce partner to stimulate tourism in the local community

http://foundationcenter.org

990 information on foundations

What it tells you:
- Size/operating budget of organization
- Total revenue and source of revenue
- Total expenses
- Cash reserves
- How much top employees make in salary

*Depending on how much the organization earns, the form may have limited information (lower earning) or very detailed info (higher earning)

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Form **990**

Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

► The organization may have to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0047

2012

Open to Public Inspection

A For the 2012 calendar year, or tax year beginning 01-01-2012 , 2012, and ending 12-31-2012

B Check if applicable
☐ Address change
☐ Name change
☐ Initial return
☐ Terminated
☐ Amended return
☐ Application pending

C Name of organization
OZARKS RIVERS HERITAGE FOUNDATION

Doing Business As

Number and street (or P O box if mail is not delivered to street address) | Room/suite
4500 STATE HIGHWAY 165

City or town, state or country, and ZIP + 4
BRANSON, MO 65616

D Employer identification number
27-2075137

E Telephone number
(417) 334-0160

G Gross receipts $ 951,644

F Name and address of principal officer
ALAN CHIP MASON
4500 STATE HIGHWAY 165
BRANSON, MO 65616

H(a) Is this a group return for affiliates? ☐ Yes ☑ No
H(b) Are all affiliates included? ☐ Yes ☐ No
If "No," attach a list (see instructions)
H(c) Group exemption number ►

I Tax-exempt status ☑ 501(c)(3) ☐ 501(c)( ) ◄ (insert no) ☐ 4947(a)(1) or ☐ 527

J Website: ► WWW TABLEROCKDAMTOURS COM

K Form of organization ☑ Corporation ☐ Trust ☐ Association ☐ Other ► | **L** Year of formation 2010 | **M** State of legal domicile MO

Part I Summary

Activities & Governance

1 Briefly describe the organization's mission or most significant activities
PROVIDE SUPPORT FOR THE US ARMY CORP OF ENGINEERS RECREATIONAL FACILITIES

2 Check this box ►☐ if the organization discontinued its operations or disposed of more than 25% of its net assets

3 Number of voting members of the governing body (Part VI, line 1a)	3	7
4 Number of independent voting members of the governing body (Part VI, line 1b)	4	7
5 Total number of individuals employed in calendar year 2012 (Part V, line 2a)	5	17
6 Total number of volunteers (estimate if necessary)	6	40
7a Total unrelated business revenue from Part VIII, column (C), line 12	7a	0
b Net unrelated business taxable income from Form 990-T, line 34	7b	0

Revenue

	Prior Year	Current Year
8 Contributions and grants (Part VIII, line 1h)	5,681	674
9 Program service revenue (Part VIII, line 2g)	222,224	784,365
10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	0	150
11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	33,558	79,485
12 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	261,463	864,674

Expenses

|		
13 Grants and similar amounts paid (Part IX, column (A), lines 1–3)	0	0
14 Benefits paid to or for members (Part IX, column (A), line 4)	0	0
15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	68,189	238,106
16a Professional fundraising fees (Part IX, column (A), line 11e)	0	

Non-Profit Advocacy/Lobbying

- Public lands and non-profits have opportunities and needs that are affected by the choices of legislators and policy makers.

- 501 (c)(3) organizations <u>can</u> engage in education, advocacy, and lobbying (in limited quantities: 20% of a non-profit's $ and time can go to lobbying) that furthers their charitable purpose

- Government employees may NOT engage in lobbying as part of their professional lives, but can as private citizens**
  **(Caution: Be careful to avoid the appearance of impropriety.)
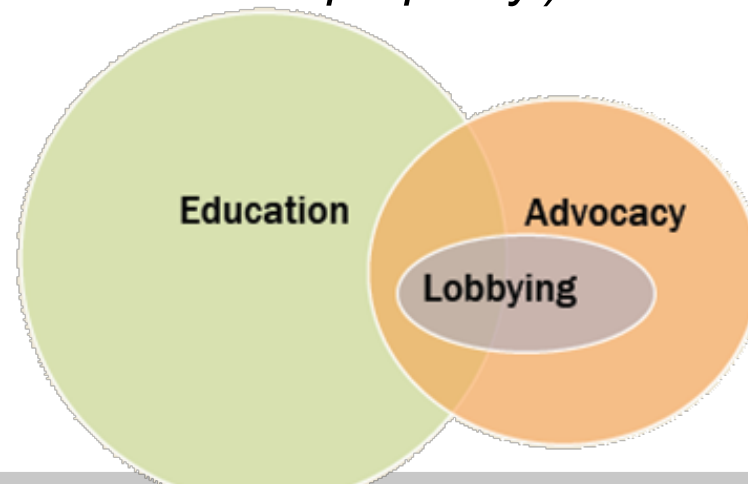
Benefits of Non-Profit Advocacy

- Enhance agency reputation

- Attract partners

- Support agency priorities

- Leverage federal funding with other sources and volunteers

- Inform public

- Carry out stewardship

NOTE: Local advocacy is very important! Elected officials pay more attention to what's written in their local/state papers than what's in the Washington Post. New authorities rise from the constituents.

Non-Profit Advocacy/Lobbying

- <u>Education</u>: Providing **unbiased** info to the government or public
  - Ex: "The Corps legal decision to terminate cooperative joint management agreements affected operations of 8 coop associations, 34 parks and 4 visitor centers."

- <u>Advocacy</u>: Sharing info with legislators, executive branch or the public to **influence** them, but not a specific legislation or call to action
  - Ex: "The Corps really needs to have the ability and legal authority to have cooperative joint management agreements to benefit the public and its partners."

- <u>Lobbying</u>: Attempts to **influence specific** government decisions or actions. Reflects a viewpoint and is a call to action.
  - Ex: "Please support /vote "Yes" on HR 4100 LOCAL Act and the S 2055 Corps of Engineers Cooperative Joint Management Restoration Act"

Partnering with For-Profit Organizations Corporate Giving Impact

- ❑ $21.09 billion annually
  - ❖ 9 out of 10 companies match employee donations
  - ❖ 49% direct cash; 33% foundation cash; 18% non-cash
  - ❖ 3% to environmental causes and programs

- ❑ 81% have a corporate foundation

- ❑ 56% have formal paid-release time volunteer programs

- ❑ Corporate giving continues to rise

- ❑ Trends
  - ❖ More focused giving (cause and trust)
  - ❖ High priority on matching gift and employee engagement programs
  - ❖ International giving is on the rise (led by manufacturing companies)

What Do Corporations Give?

- ❑ Funding

- ❑ In-kind goods and services

- ❑ Volunteers

- ❑ Industry expertise

- ❑ Promotion and communication

Why Do Corporations Give?

Social responsibility

- ❖ Care about the cause
- ❖ To be citizens, not just residents

Marketing

- ❖ Internal and external customers
- ❖ Employees involved in something "greater"
- ❖ Market share or competitive advantage

Public Relations

- ❖ Key leaders have tie to the cause
- ❖ Industry experience sharing
- ❖ Influence

Why Would Corporations Give to Corps Projects?

❑ Think broader than Corps… we provide access/network to:
  ❖ Our friends groups and cooperating associations
  ❖ Our established MOU partners

❑ Match between the land's needs and corporate interests

❑ Variety of volunteer opportunities

❑ Testing of products

❑ We manage areas that impact their industry
  ❖ Tourism
  ❖ Outdoor recreation

❑ Government connection

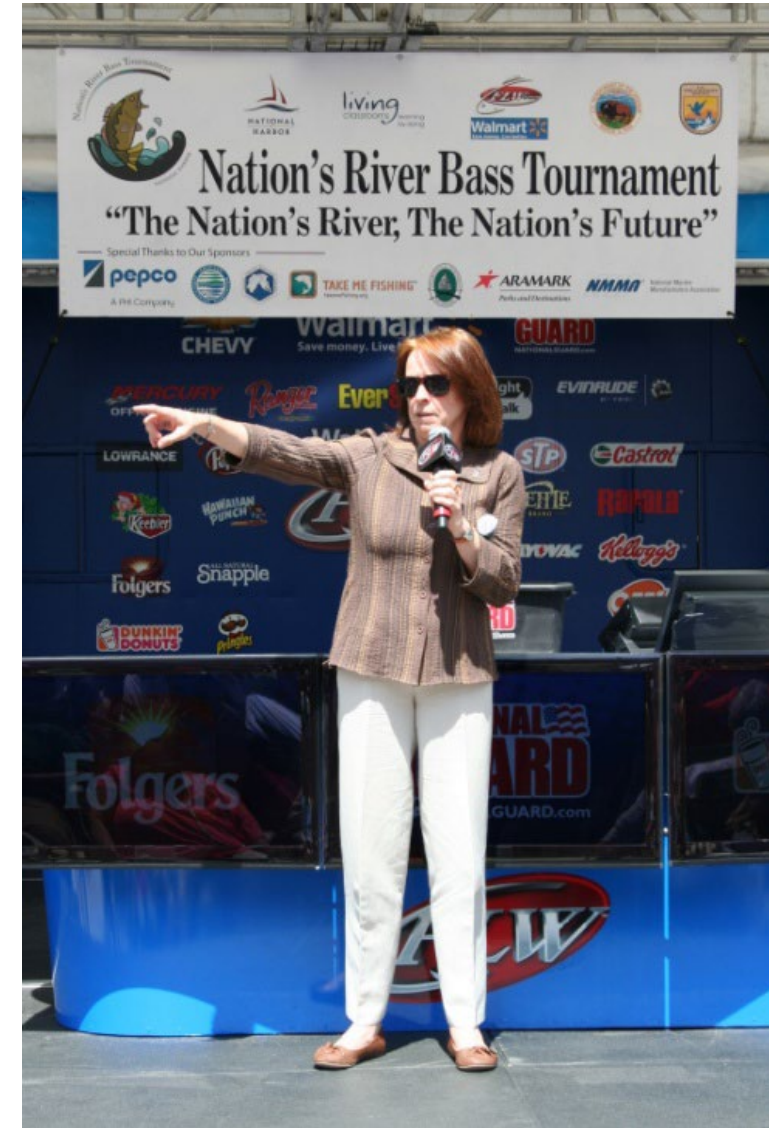❑ Employee retention (lifestyle/community building)

❑ Past success – trust

Risks for the Corps

❑ Perception of commercialization

❑ Implied endorsement

❑ Corporate image

❑ Contracting and/or litigation conflict

❑ Loss of trust – unable to keep our end of agreement
  ❖ Budget changes
 ❖ Regulation or law changes

Where to Meet/Find Corporations

❑ Partners of current partners

❑ Chambers, economic development and civic groups

❑ Look at which corporations are within 100 miles of your project

❑ Internet – NRM Gateway & corporations with common goals

❑ Current State partnerships with corporations

❑ Topical conferences/trainings (conservation, tourism…)

Exercise: What Non-Profits and For Profits are in Your Community?

❑ Take 5 minutes to jot down organizations that are within 50-100 miles of your project.

❑ Think ~~outside the box~~ like there is no box!

❑ Even organizations that seemingly have no connection to the Corps may have an interest in working with us.

❑ We will discuss some of the suggestions

Don't think OUTSIDE the box. Think like there's no BOX.
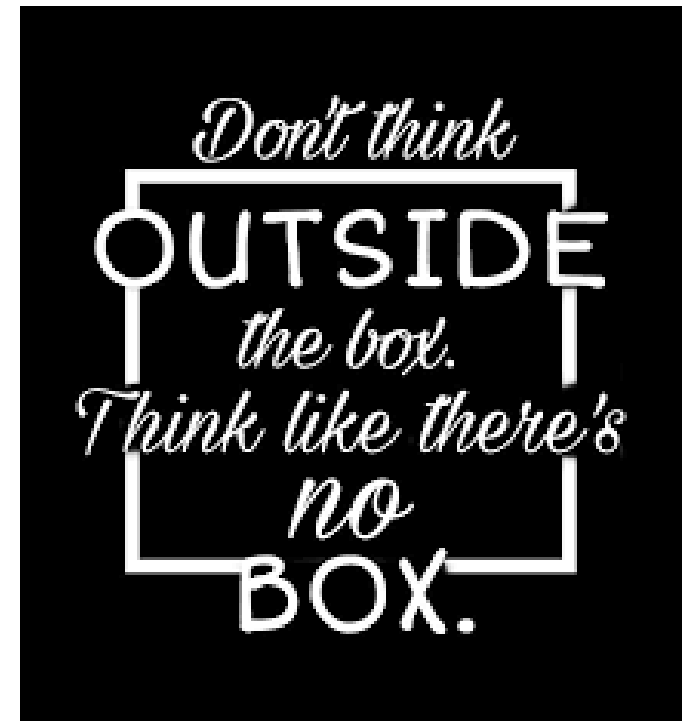
How to Approach a Corporation or Non Profit

❑ Research and understand the organization before approaching
   ❖ What is their mission and future goals
   ❖ Social responsibility and community engagement
   ❖ Past giving
   ❖ Bring friends that already have a relationship to the table

❑ Personal contact
   ❖ Set up a meeting with foundation director or community outreach point of contact
   ❖ First meeting is getting to know each other – follow their lead based on interest
   ❖ If mutual interest, set up second meeting and offer to bring proposal

❑ Simple, to the point partnership proposal
   ❖ Don't lead with a bunch of policy and paperwork
   ❖ Benefits to them and for the public (Corps)
   ❖ What we can offer to the partnership and what we need
   ❖ Plan for recognition and public relations

Corporate Social Responsibility

Many corporations have a commitment to volunteerism or donating to causes important to the organization

Volunteer Page on the Gateway has some resources to get you thinking

- Policy & Procedures
- Volunteer Forms
- Program History
- Training
- Volunteer.gov
- Job/Activity Hazard Analyses
- National Public Lands Day
- Division & District POCs
- Volunteer Awards
- Workamper News
- Corporate Social Responsibility/Volunteer Programs

- News / Current Issues
- FAQs
- Good Enough to S
- Volunteer Clothing
- Volunteer Plans an
- Related Sites
- Background Check
- Corps Photo Albu
- Volunteer Pass Pro
- Volunteer Program

Corporate Social Responsibility-Volunteer Programs-Feb20201.xlsx - Excel

Corporation	Title	Paid Volunteer Day	$ Matching Program	Standard Grant Program	How it works
Salesforce	Employee-Inspired Giving	X	X		7 days PTO ea
Sherwin-Williams	Sherwin-Williams Matching Gifts Program, The Sherwin Williams Foundation	Unknown	X	X	Matching $ do
Southwest Airlines	Tickets for Time	Unknown	X		Employees ar them through Employee vol to allow emp
Spectrum (Charter Communications)	Spectrum foundation			X	Grants are giv food drives, r
Starbucks	Matching Gifts program	Unknown	X		Match emplo year.
State Farm Insurance	Community Service/Education Support Day	X	X	X	Employees ar offers matchi volunteer pro
SunTrust Banks	OnUp Together	X	Unknown		All full-time e
Time Warner	IMPACT: A Pact to Act	X	X	X	Matching gra training, Turn Volunteers lo
TransUnion		X	X		1 paid work d
Tyson Foods	Team member giving		X		$12 match fo
Under Armour	Philanthropy	X			32 hours of p

Resources

❑http://www.tgci.com/funding.shtml - grant opportunities/foundations by state

❑https://www.guidestar.org/ – 990 information on foundations

❑http://philanthropy.com – go to corporate giving

❑http://foundationcenter.org/findfunders/topfunders/top50giving.html