



Corporate Giving Program Design and Administration Case Study

Highlighted Results

*Grantmaking based on
company values*

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*Third-party  
administration and  
grant application review*

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*Dialog and consensus
among corporate
leaders in making grant
decisions*

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*Employee involvement in  
company philanthropic  
activities*

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*Customer relationships
deepened*

Featured Project: Johnson Controls, Inc.

Johnson Controls Inc. (JCI), a Fortune 100 company headquartered in Milwaukee, Wisconsin, is a global leader in the design, manufacture and installation of automotive interiors, building efficiency through climate control products and services that optimize energy use, and battery power solutions for automobiles and hybrid-electric vehicles. JCI's vision is "a more comfortable, safe, and sustainable world" and it employs approximately 140,000 people worldwide.

The Challenge

In keeping with its company values, and in order to make a difference in the organizations it served, the Johnson Controls Building Efficiency division was seeking to create a well-administered grantmaking program for its educational institution customers. For a philanthropy program such as this, there would need to be

- 1) A centralized administration
- 2) Clear guidelines for applicants
- 3) An appropriate "hands off" level of engagement with the customer by field staff with no responsibility for making grant decisions

The Legacy Group Execution

JCI engaged The Legacy Group to design a grant application program and process that would reflect the leadership values of the corporate division and allow for efficient and relevant evaluation of grant applications. Legacy's consulting team included experts in foundation management, grant program design, and grants management.

The approach included:

- Conducting interviews of division leadership to identify corporate values
- Development of giving program grant guidelines based on the stated values and brochure design
- Development of all related program processes, including
 - ◇ Application cycles
 - ◇ Record-keeping database
 - ◇ Third-party grant application review
 - ◇ Corporate grant approval and payment
 - ◇ Post-grant follow up surveys
 - ◇ Program identification and communications handled through Legacy's offices
- Availability of Legacy advisors to corporate field staff

The Legacy Group Impact

The Legacy Group created a grant program that:

- Encourages dialog and consensus building among corporate leaders in making grant decisions validated by solid third-party recommendations
- Uses specific screening of grants based on corporate values
- Promotes new ways for JCI to deepen its commitment to its educational institution customers
- Promotes company values in the communities served and increases public perception of JCI as a caring partner with educational institutions
- Encourages employee involvement in company philanthropic activities

Client reference available upon request