

WISE GIVING™

GUIDE

BBB WISE GIVING ALLIANCE : SPRING/SUMMER 2024



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**DONATED
TO CHARITY**

Contemplating Cause-Related Marketing





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

or write to us at the address below.

SPRING/SUMMER ISSUE 2024

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Wise Giving Guide Layout and
Production — art270, inc.

Charts for *Donor Trust Report: DEI* — Alexis-Chng-Castor, Hope By Design

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Cause-related marketing has a long history with the charity community. Over forty years ago, the success of an American Express campaign for the restoration of the Statue of Liberty revolutionized this type of promotion. The basic idea was to sell products or services to consumers with the announcement that some of the purchase price would help a specified charity. Cause-related marketing creates an advertising marriage where both the participating corporation and the charity gain from the relationship. Today, it's hard to keep track of the variety of promotions that entice us to buy with the promise of helping a charity.

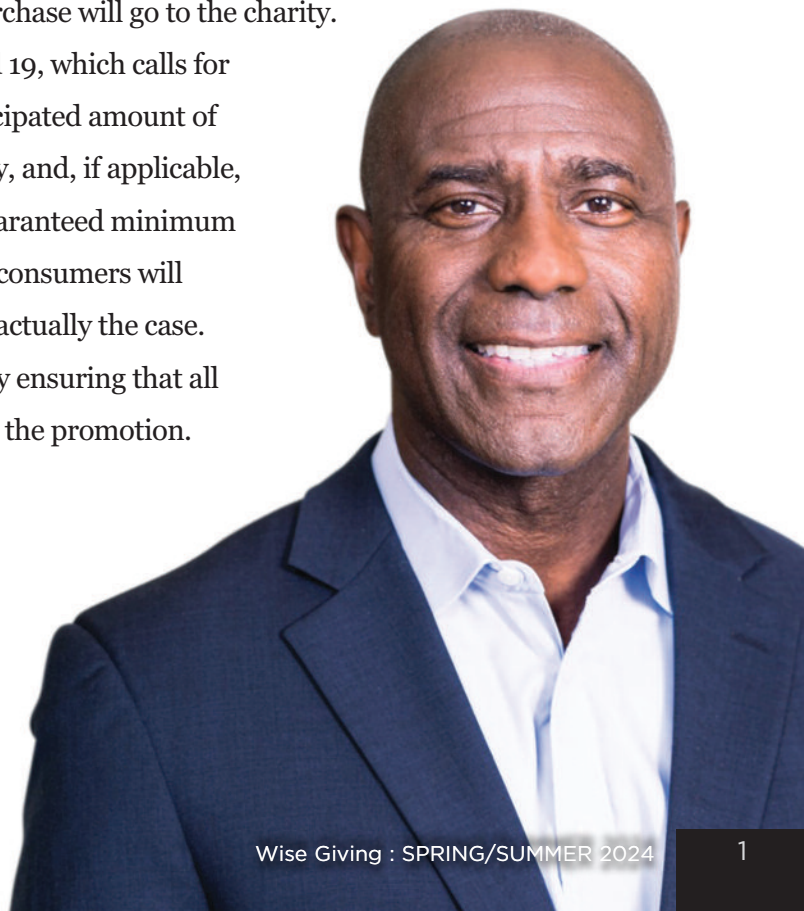
This issue's cover story takes a closer look at the public's perception of cause marketing, exploring some generational differences. Interestingly, younger people appear to be more inclined to purchase products that promise to benefit charities. In this issue, we also hear from BBB Accredited Charities on how they build trustworthy cause-related partnerships.

BBB Wise Giving Alliance is supportive of cause-related marketing, as long as the promotions are clear about how much of the purchase will go to the charity. This transparency is reflected in BBB Charity Standard 19, which calls for cause-related promotions to identify the actual or anticipated amount of the purchase price that will benefit the specified charity, and, if applicable, the duration of the campaign and any maximum or guaranteed minimum donation to the charity. Without this disclosure, some consumers will mistakenly believe more is going to the charity than is actually the case.

Transparency, in our view, also helps build trust by ensuring that all parties (business, charity, and purchasers) understand the promotion.



H. Art Taylor, *President & CEO*



Contemplating Cause-Related Marketing

Whether you are shopping online, at the supermarket, or at the mall, you are likely to stumble across cause-related marketing – a promise that, by purchasing a product or through other actions, you will also support a charity or cause.

Ideally, a cause-related marketing campaign is born out of the aligned interests between a charity, a business, and their customer. With such promotions, a charity can gain significant exposure and funding for its cause, while partnering with a business with coherent values. The business can build a cause-aligned image and goodwill, strengthening brand loyalty from customers, employees, and other constituents. And you – the consumer – can purchase from a responsible business while supporting a cause.

Of course, things aren't always perfect. A charity's cause marketing activities might divert resources from more traditional fundraising efforts that have a proven track record. A business may aim to build an image that is inconsistent with the charity's values. It is important that you – the customer – know what to look for in a cause-related promotion and can spot some red flags.

Cause promotions come in many shapes and sizes, including purchase-one-donate-one, votes or shares on social media to secure a charity gift, returning evidence of purchase to secure a donation, or the business giving a portion of the purchase price to a cause or charity. BBB Wise Giving Alliance encourages consumers to look for clear and transparent disclosures. Here are a few things to look for:

- **Who is the campaign benefiting?**

If a promotion broadly promises to “assist needy children,” “support veterans” or “help find a cure for breast cancer,” ask about the benefiting organization(s). The promotion should clearly state the name of the benefiting charity. Armed with this information, you can check out the charity by visiting our website at Give.org to see if the organization meets BBB Charity Standards. Don't assume the business has thoroughly confirmed the trustworthiness of its charity partner.

- **How are your actions making a difference?**

Cause promotions have evolved to call for an array of actions. For example, a company might promise to support a charity if you refer a friend, share a post X number of times, or reach a certain threshold in your online shopping cart. No matter what action is required of the customer, the disclosure should be clear about how your action makes a difference in the contributions the charity will receive.

- **How much of your purchase is benefiting the charity?**

If the promotion promises your purchase will benefit a charity, look for the advertising disclosure to clearly describe how much of your purchase will be contributed to the charity. Even small amounts, when accumulated, can add up to a significant contribution... but vague language can mask uncertainty or weak commitments to the charity. If an advertisement disclosure reads “A portion of the proceeds will go to the Charity,” it is reasonable to be skeptical and ask for clarity.

- **Are there any applicable limits?**

If a cause promotion expired last month or has already reached a maximum threshold, your purchase will no longer make a difference. When there is some time limit on the campaign (i.e., during the month of October) or guaranteed minimum /or maximum amount that can be raised (i.e., up to \$200,000), those points should also be included in the promotional disclosure.

Cause promotions engage consumers, but people don't always know to seek out transparency. In our December 2023 BBB Donor Trust Survey (of more than 2,100 adults in the United States), 27% of participants said they are more likely to purchase a product when they know the purchase will benefit a charity. Younger adults were most likely to be swayed by a cause marketing promotion, with 40% of Millennials (Age 26-41), and 33% of Gen Zers (Age 18-25) saying cause-related promotions make them more likely to purchase a product.

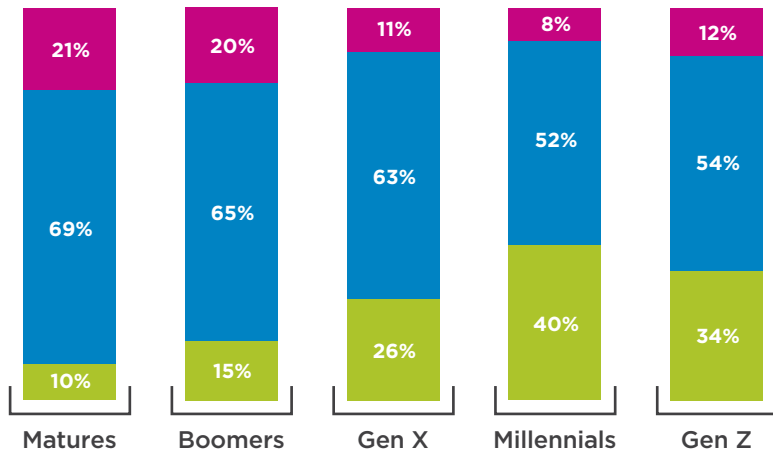


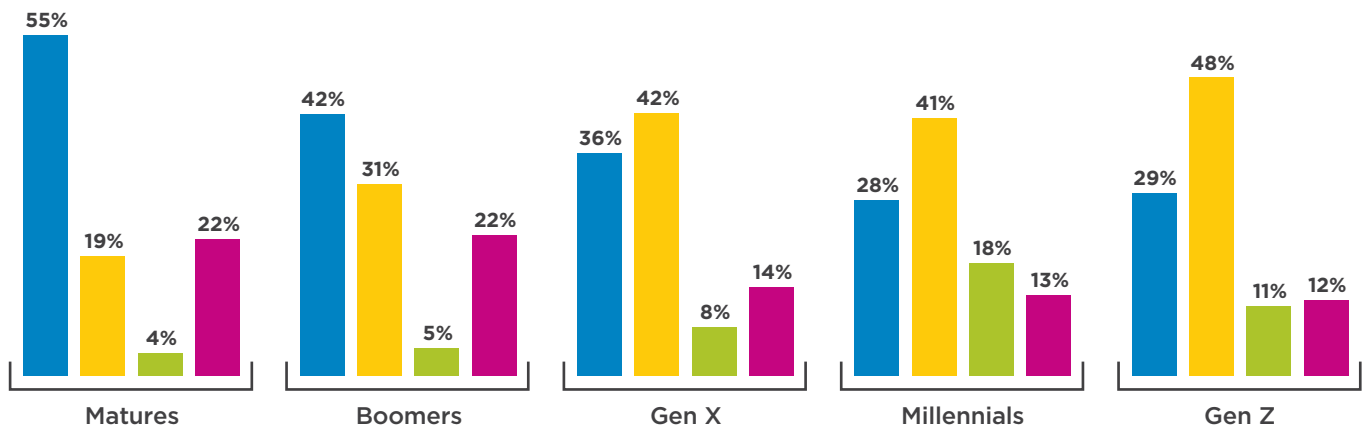
Figure 1: Imagine you are shopping and come across the statement “the purchase of this product will benefit XYZ charity.” Are you:

- More likely to purchase this product
- Equally likely to purchase this product
- Less likely to purchase this product

However, when cause promotion language is ambiguous, younger participants are most likely to assume the charitable contribution associated with their purchase will be high. For example, when presented with the statements “Your purchase of this product helps XYZ charity” and asked to estimate how much of the purchase price would benefit the charity, 55% of Matures (Aged 77 and above) said “very little,” as compared to only 28% of Millennials (Aged 26-41). Likewise, 18% of Millennials said “a lot” of the purchase price would go to the charity, as compared to only 4% among Matures.

Figure 2: Imagine you are shopping and come across the statement “Your purchase of this product helps XYZ charity.” How much of the purchase price do you think will benefit the charity?

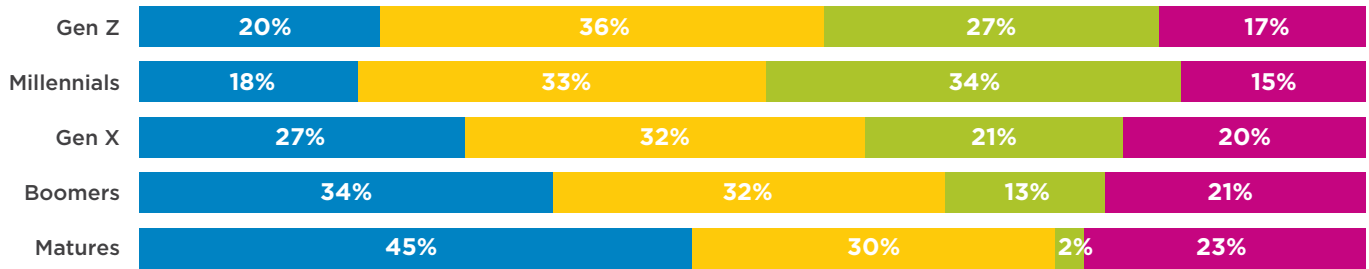
- Very little
- A moderate Amount
- A lot
- Not sure



In fact, younger generations seldom find issue with ambiguity in the language. Only 18% of Millennials are bothered by ambiguity in a cause-related marketing promotion, as compared to 45% of Matures. Correspondingly, more than 1 in 3 Millennials reacted to ambiguous language by concluding the promotion is beneficial to the charity, as compared to only 2% of Matures.

Figure 3: If, while shopping, you come across a product stating “Your purchase of this product helps XYZ charity,” which of the following best describes your reaction:

- I am bothered by the lack of specificity in the appeal
- I don't know how much of the purchase will go to the charity, but I am happy to potentially support a cause through my purchase
- I think the promotion is very beneficial to the charity
- Not sure



For cause marketing campaigns to be a win-win-win, for charities, businesses, and customers, there must be goodwill and transparency from all parties. When engaging with cause partners, charities have the right and responsibility to seek clear and transparent disclosures. In fact, to be a BBB Accredited Charity, any cause-related promotion entered by the charity should clearly disclose how the charity benefits from the sale of products or services. According to BBB Charity Standard 19, such promotions should disclose, at the point of solicitation, the actual or anticipated portion of the purchase price that will benefit the charity, and any applicable duration or contribution minimum/maximum. We recommend that charities always secure a written agreement and receive drafts of the promotional materials, to make sure the charity's name and relationship with the public is protected. You can trust BBB Accredited Charities to do cause marketing right.

One BBB Accredited Charity, 1% for the Planet, is built around a cause-related model. As expressed by Kate Williams, Chief Executive Officer at 1% for the Planet, the organization “unites a global community of businesses annually giving 1% of revenues to environmental nonprofits. We advise our member companies on their giving strategies, engage and vet nonprofits, and certify annual giving. Our model accelerates smart environmental giving and is a credible antidote to greenwashing.” Founded in 2001, 1% for the Planet now reports 5,200 business members in more than 100

countries. Kate Williams adds that “studies consistently show that brands with strong communicated values outperform competitors. Each year, we work with the Harris Poll to conduct research on our brand awareness, and in 2023, we found that 46% of the U.S. population states that the 1% for the Planet logo on a product would positively influence their purchasing decision. OXO, a 1% for the Planet Business Member specializing in home and kitchen, reports that their social media content highlighting 1% for the Planet certification and environmental partnerships sees significantly higher engagement rates than other posts.”

Finding a good corporate partner should go beyond a business' willingness to play. For example, Rachael Keyes, Senior Director at Make-A-Wish Mississippi explains that the organization chooses to participate in selected cause marketing promotions because that leverages the organization's established relationships with cause-aligned corporate partners, while helping build brand awareness: “When looking for a good corporate partner, we look to ensure that it is [an organization] that knows our mission, aligns with our mission, and can share our missions adequately reaching various communities and markets... In turn, the organization's supporters love and appreciate when they see our Chapter and brand associated with local Cause Marketing Campaigns.”

Similarly, Nikki Gannon Wargo, Vice President, Philanthropic Partnerships & Community Engagement at Ovarian Cancer Research Alliance (OCRA) shares that her

organization looks for corporate partners that share the OCRA mission to raise awareness about ovarian cancer: *“We look for partners that want to elevate the messaging around women’s health and the desire to make an impact in underfunded, yet critically needed, research and improved treatment for patients.”* Nikki Gannon adds that *“messaging is stronger when multiple voices unite. OCRA seeks out and accepts partners who can help amplify our mission to raise awareness and critical funding for ovarian and gynecologic cancer research. The louder we can make our voices heard, the more people we can reach. Cause marketing promotions give our organization important exposure to new audiences that might not otherwise be aware of the impact we are having on the communities that we serve.”*

Behind the scenes, a good cause partnership is also protected by legal agreements and other safeguards. Rachael Keyes, Senior Director at Make-A-Wish Mississippi, explains that good agreements take time: *“This is discussed in-length with the corporate partner and we ask that all promotional materials, graphics, items, and verbiage are cleared by MAW MS staff before they promote the campaign.”* At the Ovarian Cancer Research Alliance (OCRA) *“each corporate partner is given information on how to publicly acknowledge their financial support and any cause-marketing program benefitting OCRA must follow all applicable state laws... Corporate partners are also given the Five Best Practices for Transparent Cause Marketing from the NY Attorney General’s office.”*

For cause marketing campaigns to be a win-win-win, for charities, businesses, and customers, there must be goodwill and transparency from all parties.

Amy Crowell, Senior Director of Development at The Giving Kitchen (an organization providing emergency assistance to food service workers) explains that, as the organization matured, it become more discerning with whom they chose as a partner: *“We now require our partners to make a minimum financial commitment, as we realize the power our respected brand has for their sales. We also now have fewer but more impactful relationships, as we carefully manage our brand and mark to ensure it is not diluted in the marketplace.”* As explained by Amy Crowell, by partnering with brands served in and out of food service establishments, The Giving Kitchen increase awareness of both the

organization and the services provided. To protect the charity’s name when entering a cause promotion agreement, *“promotions are documented via a contract that ensures that all Better Business Bureau guidelines are followed. We require approval for all marketing materials, and each is checked for consumer protection including the amount donated per purchase, if there is a minimum guarantee, a donation cap, the campaign period and any other required actions or restrictions. We also ensure that the company we partner with registers and files contracts and campaign reports in any states needed if they are acting as a commercial co-venture. We carefully analyze all promotions for potential unrelated business income tax as well.”*

1% for the Planet reports having embedded principles of Trust-Based Philanthropy in their large network of businesses and charities, but strengthening collective trust through BBB Charity Accreditation, by listing all members, and by vetting all 1% for the Planet Environmental Partners, so consumers can feel confident.

Ultimately, you – the consumer – have power over which cause promotions are successful. Watch out for unclear disclosures. If you are not sure who is benefiting, what action is required to help, or how much your purchase or action will benefit the charity, ask the business for clarity, consider contributing to the charity directly, or consider another promotion that is more transparent. These could be signals that a business is trying to get cause-swig but is not accountable for specific results. When a campaign is clear, you can make your purchasing power count, help build awareness, and support a charity. That is why it is imperative that you are mindful of demanding clear and impactful cause promotions. As put by Kate Williams, Chief Executive Officer at 1% for the Planet, *“by leveraging their purchasing power and voice, consumers can play an essential role in advocating for 1% for the Planet. Every time a consumer chooses to purchase from a brand that is a 1% for the Planet Business Member, they help direct more support toward causes addressing urgent environmental issues around the globe. Consumer demand drives the market: businesses respond when consumers speak up.”* Nikki Gannon Wargo, Vice President, Philanthropic Partnerships & Community Engagement, Ovarian Cancer Research Alliance (OCRA), says *“supporters appreciate companies who are willing to stand beside them in their fight against ovarian cancer. They understand that companies can go anywhere so when they choose OCRA, it means something to them. It’s personal and they feel they are being heard and supported. Who in the ovarian cancer community doesn’t love a good teal [ovarian cancer awareness color] product?!”*

Q&A about BBB Wise Giving Alliance

Q *How is BBB WGA different from other charity evaluators?*

A BBB WGA is a **standards-based** charity monitoring organization that addresses a variety of issues such as board oversight, results reporting, finances, appeal accuracy, website disclosures, and donor privacy. We work with charities on an individual basis to inform them of our findings and identify ways to address any issues with our standards. Other charity monitors include metrics-based evaluators, monitors that focus on financial ratios, or evaluators that report on specific types of charities such as religious organizations.

Q *Does BBB WGA rate or grade charities?*

A No. Charities are not rated against one another. A BBB WGA evaluation concludes either that a charity meets all the standards or does not meet certain ones, for reasons described in the report. Whatever the conclusion, the report does not represent approval or disapproval of the organization or its cause. BBB WGA does not suggest that prospective contributors give, or not give, to any particular organization.

Q *How does the BBB WGA decide which charities to review?*

A Inquiries from the public about a particular national charity prompt a BBB WGA letter requesting that the charity file information for a review. These inquiries come to us directly, by mail, phone, e-mail, and in referrals from local Better Business Bureaus. In addition, charities may file information for a review on their own initiative. In either case, BBB WGA determines whether the charity is soliciting nationally before it requests information. ***There is no charge to charities for being evaluated.***

National Charity Seal Licensing Program



give.org

Watch for the seal in a charity's mailings, on its website, in newspaper and magazine advertisements, on TV, in public service announcements, and elsewhere. The seal means the national charity displaying it meets the comprehensive standards of the BBB Wise Giving Alliance.

Use of the seal is entirely voluntary. Not every national charity that meets the standards will choose to participate in the seal program. Participants sign a license agreement and pay a sliding-scale fee based on their total contributions in the past year. A national charity is eligible to apply for participation in the seal program only after an evaluation concludes that the charity meets standards. Licensing fees help BBB WGA cover its expenses.

Occasionally donors ask BBB WGA whether licensing fees influence the outcome of charity evaluations. The answer is no. Our analyst staff is very thorough for each evaluation completed. After a charity report is posted online that shows the organization meets all 20 standards, a separate marketing staff then contacts the charity to invite them to consider participating in the seal program. In addition to this separation of the analytical and licensing processes, BBB WGA ensures that seal participants are reviewed with the same frequency (every two years) as other national charities. Since the inception of the Accredited Charity Seal, about 9% of participating charities were dropped from the seal program as the charity either no longer met standards or did not provide requested updated information. BBB WGA's commitment to objectivity is unwavering. We know that the public's trust in our work is essential to our credibility.

BBB Standards for Charity Accountability

After a three-year period, drawing on independent research on donor expectations, professional and technical assistance from a variety of philanthropic experts, and numerous comments from donors and charities, the BBB Wise Giving Alliance issued the *Standards for Charity Accountability*.

The full text of the new standards, with a preface and an Implementation Guide describing how the Alliance applies them, is accessible on our website, www.give.org.

GOVERNANCE AND OVERSIGHT

The governing board has the ultimate oversight authority for any charitable organization. This section of the standards seeks to ensure that the volunteer board is active, independent and free of self-dealing. To meet these standards, the organization shall have:

- 1. A board of directors that provides adequate oversight of the charity's operations and its staff.** Indication of adequate oversight includes, but is not limited to, regularly scheduled appraisals of the CEO's performance, evidence of disbursement controls such as board approval of the budget and fund raising practices, establishment of a conflict of interest policy and establishment of accounting procedures sufficient to safeguard charity finances.
- 2. A board of directors with a minimum of five voting members.**
- 3. A minimum of three evenly spaced meetings per year of the full governing body with a majority in attendance, with face-to-face participation.** A conference call of the full board can substitute for one of the three meetings of the governing body. For all meetings, alternative modes of participation are acceptable for those with physical disabilities.
- 4. Not more than one or 10% (whichever is greater) directly or indirectly compensated person(s) serving as voting member(s) of the board. Compensated members shall not serve as the board's chair or treasurer.** [Publicly soliciting churches and other houses of worship: see the Implementation Guide at www.give.org for further information about the application of this standard.]
- 5. No transaction(s) in which any board or staff members have material conflicting interests with the charity resulting from any relationship or business affiliation.** Factors that will be considered when concluding whether or not a related party transaction constitutes a conflict of interest and if such a conflict is material, include, but are not limited to: any arm's length procedures established by the charity; the size of the transaction relative to like expenses of

the charity; whether the interested party participated in the board vote on the transaction; if competitive bids were sought and whether the transaction is one-time, recurring or ongoing.

MEASURING EFFECTIVENESS

An organization should regularly assess its effectiveness in achieving its mission. This section seeks to ensure that an organization has defined, measurable goals and objectives in place and a defined process in place to evaluate the success and impact of its program(s) in fulfilling the goals and objectives of the organization and that also identifies ways to address any deficiencies. To meet these standards, a charitable organization shall:

- 6. Have a board policy of assessing, no less than every two years, the organization's performance and effectiveness and of determining future actions required to achieve its mission.**
- 7. Submit to the organization's governing body, for its approval, a written report that outlines the results of the aforementioned performance and effectiveness assessment and recommendations for future actions.**

FINANCES

This section of the standards seeks to ensure that the charity spends its funds honestly, prudently and in accordance with statements made in fund raising appeals. To meet these standards, the charitable organization shall:

Please note that standards 8 and 9 have different denominators.

- 8. Spend at least 65% of its total expenses on program activities.**

Formula for Standard 8:

$$\frac{\text{Total Program Service Expenses}}{\text{Total Expenses}}$$
 should be at least **65%**

- 9. Spend no more than 35% of related contributions on fund raising. Related contributions include donations, legacies and other gifts received as a result of fund raising efforts.**

Formula for Standard 9:

$$\frac{\text{Total Fund Raising Expenses}}{\text{Total Related Contributions}}$$
 should be no more than **35%**

- 10. Avoid accumulating funds that could be used for current program activities. To meet this standard, the charity's unrestricted net assets available for use should not be more than three times the size of the past year's expenses or three times the size of the current year's budget, whichever is higher.** [Meeting certain public disclosure requirements described in the Implementation Guide at www.give.org may enable a charity to satisfy this standard.]

An organization that does not meet Standards 8, 9 and/or 10 may provide evidence to demonstrate that its use of funds is reasonable. The higher fund raising and administrative costs of a newly created organization, donor restrictions on the use of funds, exceptional bequests, a stigma associated with a cause and environmental or political events beyond an organization's control are among factors which may result in expenditures that are reasonable although they do not meet the financial measures cited in these standards.

11. Make available to all, on request, complete annual financial statements prepared in accordance with generally accepted accounting principles. When total annual gross income exceeds \$1,000,000, these statements should be audited in accordance with generally accepted auditing standards. For charities whose annual gross income is less than \$1,000,000, a review by a certified public accountant is sufficient to meet this standard. For charities whose annual gross income is less than \$250,000, an internally produced, complete financial statement is sufficient to meet this standard.

12. Include in the financial statements a breakdown of expenses (e.g., salaries, travel, postage, etc.) that shows what portion of these expenses was allocated to program, fund raising and administrative activities. If the charity has more than one major program category, the schedule should provide a breakdown for each category.

13. Accurately report the charity's expenses, including any joint cost allocations, in its financial statements. For example, audited or unaudited statements which inaccurately claim zero fund raising expenses or otherwise understate the amount a charity spends on fund raising, and/or overstate the amount it spends on programs will not meet this standard.

14. Have a board-approved annual budget for its current fiscal year, outlining projected expenses for major program activities, fund raising and administration.

FUND RAISING AND INFORMATIONAL MATERIALS

A fund raising appeal is often the only contact a donor has with a charity and may be the sole impetus for giving. This section of the standards seeks to ensure that a charity's representations to the public are accurate, complete and respectful. To meet these standards, the charitable organization shall:

15. Have solicitations and informational materials, distributed by any means, that are accurate, truthful and not misleading, both in whole and in part.

Appeals that omit a clear description of program(s) for which contributions are sought will not meet this standard.

A charity should also be able to substantiate that the timing and nature of its expenditures are in accordance with what is stated, expressed or implied in the charity's solicitations.

16. Have an annual report available to all, on request, that includes:

- (a) the organization's mission statement,
- (b) a summary of the past year's program service accomplishments,
- (c) a roster of the officers and members of the board of directors,
- (d) financial information that includes:
 - (i) total income in the past fiscal year,
 - (ii) expenses in the same program, fund raising and administrative categories as in the financial statements, and
 - (iii) ending net assets.

17. Include on any charity websites that solicit contributions, the same information that is recommended for annual reports, as well as the mailing address of the charity and electronic access to its most recent IRS Form 990.

18. Address privacy concerns of donors by

- (a) providing in written appeals, at least annually, a means (e.g., such as a check off box) for both new and continuing donors to inform the charity if they do not want their name and address shared outside the organization, and
- (b) providing a clear, prominent and easily accessible privacy policy on any of its websites that tells visitors
 - (i) what information, if any, is being collected about them by the charity and how this information will be used,
 - (ii) how to contact the charity to review personal information collected and request corrections,
 - (iii) how to inform the charity (e.g., a check off box) that the visitor does not wish his/her personal information to be shared outside the organization, and
 - (iv) what security measures the charity has in place to protect personal information.

19. Clearly disclose how the charity benefits from the sale of products or services (i.e., cause-related marketing) that state or imply that a charity will benefit from a consumer sale or transaction. Such promotions should disclose, at the point of solicitation:

- (a) the actual or anticipated portion of the purchase price that will benefit the charity (e.g., 5 cents will be contributed to abc charity for every xyz company product sold),
- (b) the duration of the campaign (e.g., the month of October),
- (c) any maximum or guaranteed minimum contribution amount (e.g., up to a maximum of \$200,000).

20. Respond promptly to and act on complaints brought to its attention by the BBB Wise Giving Alliance and/or local Better Business Bureaus about fund raising practices, privacy policy violations and/or other issues.

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Thanks for Your Support

Key support for the BBB Wise Giving Alliance comes from individuals like you. Your donations make possible the charity evaluations and wise giving publications you rely on. Thank you for your generosity and your shared interest in strengthening the accountability of the nation's charities. Give with confidence to charities and give generously.



give.org

Look for our Seal on charity websites and appeals as a quick and easy way to see that the charity has met the *BBB Standards for Charity Accountability*. National charities that meet the Standards have the option of participating in our seal program. Go to www.give.org for more details.

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