

The Blended Value Map Annotated Bibliography

Introductory Note:

Please note, this document is meant to accompany The Blended Value Map. The descriptions of organizations and resources in this document are primarily drawn directly from the relevant websites. When another website or document is the source, the link or reference is provided. The descriptions in this document are not meant to be definitive, we recommend readers go directly to the source material or website listed for more definitive material.

Corporate Social Responsibility (CSR)

General Overview

Information Resources (Books, Articles, Websites)

Business for Social Responsibility Website www.bsr.org white papers

Business for Social Responsibility (BSR) is a global organization that helps member companies achieve success in ways that respect ethical values, people, communities and the environment. BSR provides information, tools, training and advisory services to make corporate social responsibility an integral part of business operations and strategies. A nonprofit organization, BSR promotes cross sector collaboration and contributes to global efforts to advance the field of corporate social responsibility.

www.bsr.org

AtKisson Accelerator Sustainability Tool Kit

The *AtKisson Accelerator* (trademarks and registrations pending) is a comprehensive toolkit that helps integrate sustainability into organizations, initiatives, and plans. It is for use by any group, organization, business, community, or region, in virtually any context. *The purpose is to help those initiatives to develop more quickly and to be much more effective in facilitating system-wide change towards sustainability.*

The *Accelerator* consists of three core tools, organized around three activities fundamental to making change happen. Each tool and activity has a symbol:

- (1) COMPASS: Assessing status and measuring progress toward sustainability
- (2) PYRAMID: Training and planning for strategic sustainability initiatives
- (3) AMOEBA: Promoting the acceptance and adoption of sustainability-related ideas and innovations

www.atkisson.com

CSRwire.com Website

CSRwire seeks to promote the growth of corporate responsibility and sustainability through solutions-based information and positive examples of corporate practices. They have 4 core services:

- **Press Release Distribution**
- **Corporate Report Links**
- **CSR Events Promotion**
- **CSR Resources**

www.csrwire.com

“Conversations with Disbelievers” report by Weiser & Zadek

Zadek, Simon, John Weiser, Conversations with Disbelievers. 2000

John Weiser and Simon Zadek published *Conversations with Disbelievers* in October 2000 with the aim of encouraging business to address their corporate social responsibility. It explores the arguments that corporations can achieve financial benefits for themselves as well as have a positive effect on the social and natural environments of which they are a part.

www.conversations-with-disbelievers.net

“Making The Business Case for Sustainability” by M. Epstein & M. Roy

Epstein, Marc J., M.J. Roy. 2002. "Making the Business Case for Sustainability: Linking Social and Environmental Actions to Financial Performance." *Journal of Corporate Citizenship* forthcoming 2003

www.jonesgsm.rice.edu/faculty/marcepstein/default.asp

CasePlace.org

This is the place where business school faculty can find hundreds of business case studies and supporting materials that incorporate [Social Impact Management](#) into business education. CasePlace.org is a free service of the Aspen Institute’s Business and Society Program (BSP). You can search for cases, using a carefully created set of keywords. Search results provide abstracts as well as background and source information. Links allow users to obtain cases and teaching notes from publishing entities. In addition, community discussion boards allow registered users to submit articles. New materials are being added on an ongoing basis.

www.caseplace.org

BITC Environment Index & Corporate Responsibility Index (UK)

Business in the Community is a unique movement of 700 member companies committed to continually improving their positive impact on society.

<http://www2.bitc.org.uk>

Council on Economic Priorities book on Corporate Report Card

More people than ever before are putting their money in stocks and mutual funds, and many of them are concerned about the social records and commitments of the companies they invest in. Companies earning high marks for responsible actions will find that their good works can be translated into investors' confidence and support. The Council on Economic Priorities, a public research organization dedicated to accurate and impartial analysis of the social and environmental records of corporations, provides just such detailed information in The Corporate Report Card. Each of the more than 250 entries are rated from A to F on information regarding the company's record including:

- Environmental issues
- Advancement of women and minorities
- Interaction with the community, volunteerism, charitable donations
- Benefits: 401K, medical coverage
- Legal proceedings of interest to investors
- Executive compensation

http://www.amazon.com/exec/obidos/tg/detail/-/0525942874/qid=1057179213/sr=8-1/ref=sr_8_1/103-0341049-2699026?v=glance&s=books&n=507846

WinWin Partners Website

Win-Win Partners are companies and organizations achieving competitive advantage through community investment. Companies employing win-win strategies as smart business solutions include major U.S. corporations such as AOL Time Warner, State Farm Insurance, Marriott International, Pfizer, the Gap and many others. Win-Win Partners also include national organizations that assist companies with successful execution of these strategies by providing them with valuable services such as research and market data, brokering, networking opportunities with other executives, and years of professional experience in this field.

Win-Win Partners are an outgrowth of the Ford Foundation Corporate Involvement Initiative.

www.winwinpartner.com

Digital Dividend Website (WRI)

Digital Dividend’s goal is to identify and promote sustainable solutions for bridging the global digital divide—catalyzing large-scale use of information and communications technologies (ICTs) to create social and economic “dividends” in poor communities throughout the developing world.

www.digitaldividend.org

The Future of Corporate Social Responsibility

Part of becoming a leader in CSR is understanding the longer-term trends in social and environmental issues and how they may impact stakeholder demands, potential partnerships, and consumer attitudes in the years to come. VanCity commissioned this study on the future of CSR as part of an overall scan to understand CSR trends.

http://www.vancity.com/downloads/Future_of_CSR.pdf

CSR Europe Newsletter

CSR Europe is a business-driven membership network. Our mission is to help companies achieve profitability sustainable growth and human progress by placing corporate social responsibility in the mainstream of business practice.

<http://www.csreurope.org/>

“Building Competitiveness & Communities: How World Class Companies are Creating Shareholder Value and Societal Value” book by J. Nelson

Published in collaboration with the World Bank and the United Nations Development Programme, and based on three years of research, interviews and surveys with over 20 of the world's most successful and respected companies in over 30 countries, this report focuses on the different ways in which these companies are creating socio-economic multipliers for development. It explores ways in which it is possible to create not only economic value-added for shareholders, but also societal value-added for a wider range of stakeholders. Recognising that corporate leaders, and their reputations in the global economy, are in the spotlight to an unprecedented degree, this book examines the role of business leaders in shaping the agendas of international, national and local governance, development and policy. It includes discussion of the five business ‘pillars of performance’ separating world-class companies from the rest.

<http://www.iblf.org/csr/csrwebassist.nsf/content/f1d2a3a4e5.html>

“Everybody’s Business: Managing Risks & Opportunities in Today’s Global Society” book by D. Grayson & A. Hodges

Issues which until now have been 'soft' for business, such as environment, diversity and human rights - are now hard; hard to ignore, hard to manage and very hard to control if they go wrong.

This practical handbook and resource empowers managers to meet changing expectations from customers, employees, communities and investors.

- A practical handbook for managers
- Empowers managers to meet changing expectations from customers, employees, communities and investors
- Includes a seven-step model for minimising risks and maximising opportunities in business in the 21st century
- Presented in plain language and graphic style to communicate with busy managers
- Can be used in training workshops, management conferences and team briefings

<http://uk.dk.com/Book/BookFrame/0,1007,,00.html?11CS^0751336777>

2002 Cone Corporate Citizenship Study

The 2002 Cone Corporate Citizenship Study was conducted via telephone interviews from July 26-29, 2002. The survey included a national cross-section of 1,040 adults. It was conducted by Opinion Research Corporation International and has an error margin of +/- three percentage points.

www.coneinc.com/Pages/pr_13.html

Mallenbaker.net CSR Website

This site is part of the personal site of Mallen Baker - Development Director for Business in the Community. It is an expression of my own interest and concern in how companies respond to the agenda for corporate citizenship - the growing need to manage issues that affect their business reputation - and to respond to the growing needs and concerns of a range of different stakeholders.

This site is distinguished in that it is:

- Issues-based, looking at the emerging factors that are often about core product or service, or top level business strategy
- International in focus, covering news and views of corporate social responsibility across the world
- With a strong side-focus towards business change agents, about whom see more below
- Frequently updated

www.mallenbaker.net/csr/

Business Ethics Magazine

The mission of Business Ethics is to promote ethical business practices, to serve that growing community of professionals striving to work and invest in responsible ways.

www.business-ethics.com

“Beyond Built to Last” by Graves & Waddock

Graves, Samuel B., and Sandra Waddock. Beyond ‘Built to Last: An Evaluation of Stakeholder Relationships in ‘Built-to-Last’ Companies. N.p.: Business and Society Review, 2000. 393-418.

<http://www2.bc.edu/~waddock/CV%7ESW.doc>

“Walking the Talk” by Holliday, Schmidheiny & Watts

Holliday , Charles O., Stephan Schmidheiny, and Philips Watts. Walking the Talk. Greenleaf Ltd, 2002. 1-288.

This book explains that markets must be mobilized in favor of sustainability, leveraging the power of innovation and global markets for the benefit of everyone. Business cannot succeed in failing societies.

Whether small, medium or large, all businesses must innovate and change to meet the social and environmental challenges of the coming years. Walking the Talk provides proven strategies for doing just that, and real-world examples of business leaders who are becoming a leading force for change – improving both their own bottom lines and quality of life for future generations.

www.amazon.co.uk/exec/obidos/asin/1874719500/202-8894741-2669401

“CSR: Making Good Business Sense” by WBCSD

Stigson, Björn, WBCSD, CSR Making Good Business Sense. Corporate Responsibility, 2003

CSR has been gathering more and more interest worldwide over recent years, both from the general public and the private sector. The public, because they want to find out more and the private sector, because they want to communicate their achievements. The increased speed of flow of information in the public domain brings the private sector into the spotlight. Corporate accountability and transparency are not only expected but must also be verifiable. The space to be able to make mistakes or to not behave responsibly has been reduced. Added to the traditional historical reasons why companies incorporate CSR into their working practices is a powerful driver, that of reputation and brand management.

www.responsiblepractice.com/english/introduction/wbcd/

Ethical Corporation Magazine

Ethical Corporation magazine is designed for business professionals and senior executives in large organizations who are responsible for social and environmental issues. Publishing 52 pages a month, the hard copy print magazine is concise, yet packed with articles on managing corporate responsibility.

www.environmental-center.com/magazine/ethicalcorporation/

“Misguided Virtue” by David Henderson

Henderson, David, Misguided Virtue. Institute of Economic Affairs, 2001.1-171.

The doctrine of Corporate Social Responsibility (CSR) now enjoys widespread support. Companies are enjoined not simply to seek profit but to demonstrate their 'corporate citizenship' by working with a range of stakeholders to further environmental and social as well as economic goals. Pressures for such behavior have come from NGOs but have been taken up by academics, other commentators and multinational enterprises themselves.

David Henderson examines the CSR doctrine, subjecting it to fundamental criticisms. In this controversial text he argues that, far from being harmless, its adoption threatens prosperity in poor countries as well as rich. It is likely to reduce competition and economic freedom and to undermine the market economy.

www.coronetbooks.com/books/misg5101.htm

“People and Profits” by Margolis & Walsh

Margolis, Joshua D., James P. Walsh, People and Profits. Lawrence Erlbaum Associates, 2001.

The purpose of *People and Profits* is to provide a comprehensive review, critique, and integration of the empirical literature that truly enlightens the reader about the social-financial performance relationship. This book is part of a LEA (Lawrence Erlbaum Associates) Organization and Management Series.

<http://www.bsu.edu/majb/vol18.html>

“Beyond Selfishness” by Mintzberg, Simons & Basu

Mintzberg, Henry, Robert Simons, Kunal Basu, Beyond Selfishness. 2002.

Mintzberg, Henry, Robert Simons, and Kunal Basu. "Beyond Selfishness." *Sloan Management Review* 44, no. 1 (fall 2002): 67-74.

A syndrome of selfishness, built on a series of half-truths, has taken hold of our corporations and our societies, as well as our minds. This calculus of glorified self-interest and the fabrications upon which it is based must be challenged.

<http://sloanserver.mit.edu:8765/smrquery.html?col=smr2&qc=smr2&qp=url%3Awww.mit-smr.com%2Fpast%2F2002&qt=Beyond+Selfishness>

“Coming Clean” by R. Repetto & D. Austin (WRI)

Repetto, Robert, Duncan Austin, Coming Clean. 2002. 44.

In Coming Clean Corporate Disclosure of Financially Significant Environmental Risks, WRI economists Robert Repetto and Duncan Austin examine the extent to which one group of companies are failing to disclose their exposure to financially material environmental issues. In a companion WRI report entitled Pure Profit: The Financial Implications of Environmental Performance, the authors showed that in the U.S. pulp and paper industry-just one of many sectors for which the environment poses financial threats-many impending environmental issues are likely to affect companies' competitive positions and fundamental shareholder values. *Coming Clean* shows that such risks have not been adequately disclosed in annual or quarterly filings to the SEC. Such omissions appear to infringe the SEC's own rules and guidelines, endangering investors as a result. The report raises issues regarding the SEC's enforcement policies as well as companies' reporting practices.

www.wristore.com/comingclean.html

Copenhagen Center Reports

TCC is an international, autonomous institution established by the Danish Government.

TCC recognizes the need for governments to create a framework encouraging public/private partnerships to emerge, develop and work.

TCC focuses on social cohesion. Governments, business community and social partners can provide and support opportunities for the less privileged to retain their jobs or to be included in the workforce.

TCC builds on the assumption that joining forces, thus promoting social sustainability, is better and more cost-effective than just shifting burdens between public and private responsibility.

TCC believes that voluntary partnerships between government and business are highly effective in creating social cohesion.

TCC is positioned to collaborate with the international business networks.

TCC's geographic scope is, in principle, global, but with particular focus on Europe.

www.copenhagencentre.org

“Redefining CSR” report by M. Goyder (Tomorrow’s Company)

Our vision is to create, with business, a future for business which makes equal sense to staff, shareholders and society. Tomorrow’s Company achieves this through four

objectives: by acting as a leading and influential networking hub for organizations, by identifying and exploring the future of sustainable success, by undertaking and publishing agenda setting research and by promoting the adoption of new ideas and concepts.

<http://www.tomorrowcompany.com/>

“Altered Images: the 2001 State of Corporate Responsibility in India Poll” by R. Kumar, D. Murphy & V. Balsari

Kumar, R., D. Murphy, V. Balsari, Altered Images: the 2001 State of Corporate Responsibility in India Poll. 2001.

Their vision is to contribute to a positive change towards business practices and attitudes that support sustainable development and poverty eradication in the region. The focus is on expanding the knowledge base of corporate practices in South Asia relating to working conditions within factories; living conditions in surrounding communities; environmental protection; and corporate accountability and transparency. In this way, they aim to provide useful information and tools (such as training materials) for South Asian companies and civil society groups, especially the more vulnerable income groups, in the three countries. They hope that this will assist in eventually elaborating a homegrown agenda of corporate responsibility sensitive to the social, cultural, and economic situation in India, Sri Lanka, and Bangladesh.

<http://www.teriin.org/pub/books/cr.htm>

The Journal of Corporate Citizenship

The Journal of Corporate Citizenship (JCC) aims to publish the best ideas integrating the theory and practice of corporate citizenship in a format that is readable, accessible, engaging, interesting and useful for readers in business, consultancy, government, NGOs and academia. This peer-reviewed journal encourages practical, theoretically sound, and (when relevant) empirically rigorous manuscripts that address real-world implications of corporate citizenship in global and local contexts. Topics related to corporate citizenship can include (but are not limited to): corporate responsibility, stakeholder relationships, public policy, sustainability and environment, human and labor rights/issues, governance, accountability and transparency, globalization, small and medium-sized enterprises (SMEs) as well as multinational firms, ethics, measurement, and specific issues related corporate citizenship, such as diversity, poverty, education, information, trust, supply chain management, and problematic or constructive corporate/human behaviors and practices.

www.greenleaf-publishing.com/jcc/jcchome.htm

“The Divine Right of Capital” book by M. Kelly

Kelly, Marjorie. The Divine Right of Capital: Dethroning the Corporate Aristocracy. N.p.: Berrett-Koehler, 2001. 1-200.

The *Divine Right of Capital* exposes the fundamental ills of the corporate system. Marjorie Kelly argues that focusing on making profits for stockholders to the exclusion of everyone else's interests is a form of discrimination based on property or wealth. She shows how the bias is held by their institutional structures, much as they once held biases against blacks and women.

The Divine Right of Capital shows how to design more equitable alternatives—new property rights, new forms of citizenship in corporate governance, new ways of looking at corporate performance—that build on both democratic and market principles.

www.amazon.com/exec/obidos/tg/detail/-/1576751252/qid=1061929766/sr=2-1/104-6833043-9206316?v=glance&s=books

The Material World 2003 Benchmark: Survey of Global Reporting

CSR Network and Cameron-Cole, LLC. recently released Material World: The 2003 Benchmark Survey Report, a detailed research project evaluating global reporting among the 100 largest companies in the world, by revenue, as listed in the Fortune 500. The concept results from the simple proposition that global economic actors have global environmental and social impacts and should be encouraged to produce global, as opposed to national, environmental and social reports. For the first time this year the scope of the Survey has been expanded to include greater detail on global social and sustainability reporting as well as environmental reporting.

The 2003 Benchmark Survey research project analyzed global reports and reporting available in English in the public domain during the period October 2002 to March 2003. This reporting encompasses 2001 and 2002 data. The 2003 Survey evaluated reporting by each company according to thirty-two reporting categories adding to and developing the extensive Benchmark Survey database, which has tracked reporting since 1999.

www.nimahunter.com/reports.asp#rep2

Resource Organizations

Business for Social Responsibility (BSR)

Business for Social Responsibility (BSR) is a global organization that helps member companies achieve success in ways that respect ethical values, people, communities and the environment. BSR provides information, tools, training and advisory services to make corporate social responsibility an integral part of business operations and strategies. A nonprofit organization, BSR promotes cross sector collaboration and contributes to global efforts to advance the field of corporate social responsibility.

www.bsr.org

US Chamber of Commerce Center for Corporate Citizenship

The U.S. Chamber of Commerce Center for Corporate Citizenship (CCC) is a 501(c)3 non-profit organization dedicated to serving the humanitarian, philanthropic, and civic needs and aspirations of American business. The CCC has access to an unparalleled network of business, government, and community service organizations, the convening power of the U.S. Chamber of Commerce, the Chamber's institutional mission to represent business, and a strategic location in Washington, D.C. -- which facilitates access to Congress, federal government agencies, and more than 4,000 non-profit organizations located in the nation's capital.

The CCC supports the U.S. Chamber federation -- which includes 3,000 state and local chambers of commerce, and 92 American Chambers of Commerce abroad -- representing a global reach of more than 3 million companies.

They are dedicated to assisting small and medium-sized business owners, corporate foundation and corporate community relations managers, and chamber executives. They work extensively with government agencies, community service organizations, and through leaders in the field of corporate citizenship.

www.uschamber.com/ccc/default

Center for Ethical Business Cultures (CEBC)

The Center for Ethical Business Cultures (CEBC) assists leaders in creating ethical and profitable business cultures at the enterprise, community and global levels.

CEBC adds value for its member companies and the community by

- Building Awareness - through research, publications and public forums - of the critical importance of business ethics and corporate citizenship;
- Generating Products and Services that assist companies in building ethical cultures; and,
- Educating the Next Generation of Business Leaders, in collaboration with its university partners.
- The Center's products, services and research are focused in three areas:
 - Ethical Leadership, Management and Culture
 - Work-Life and Critical Employer-Employee Relationships
 - Corporate Citizenship

www.cebcglobal.org/

International Chamber of Commerce

ICC Publishing, Inc. is a wholly owned subsidiary of the International Chamber of Commerce, (ICC), the World Business Organization, based in Paris, France.

www.iccbooks.com

World Economic Forum

The World Economic Forum is an independent organization committed to improving the state of the world. They embrace new challenges by developing initiatives, which support their core principles and values, which are to:

- Provide a collaborative framework for world leaders to address global issues;
- Promote entrepreneurship in the global public interest;
- Maintain a non-partisan and independent position.

Funded by the membership fees of the 1,000 foremost global companies, the Forum works in partnership with:

- Academia
- Government representatives
- International organizations
- Labor leaders
- Media
- Non-governmental organizations
- Religious leaders

www.weforum.org

Interfaith Center on Corporate Responsibility (ICCR)

ICCR is a thirty-year-old international coalition of 275 faith-based institutional investors including denominations, religious communities, pension funds, healthcare corporations, foundations and dioceses with combined portfolios worth an estimated \$100 billion. As responsible stewards, they merge social values with investment decisions, believing they must achieve more than an acceptable financial return. ICCR members utilize religious investments and other resources to change unjust or harmful corporate policies, working for peace, economic justice and stewardship of the Earth.

www.iccr.org/

Aspen Institute Business and Society Program

The Business and Society Program is an independently funded policy program at the Aspen Institute, dedicated to increasing the supply of business leaders who understand and seek to balance the complex relationship between business success and social and environmental progress.

www.aspeninstitute.org/Program2.asp?i=82

The Enterprise Group (TEG)

The Enterprise Group is an Atlanta-based business development and consulting firm serving corporations, foundations, public agencies, trade associations, and nonprofit organizations. TEG specializes in the identification, development, and facilitation of

strategic partnerships between the private and public sectors. Typically, these strategic partnerships enable corporations to increase the impact of their community relations and corporate involvement functions, and enhance their reputations and brand identities among key customer groups

The Enterprise Group works with companies from a broad range of industries and tailors its assistance to address each specific company and business challenge. For example, TEG created a community relations plan for the launch of Sony Development Corporation's Metreon, a 350,000 square-foot retail and entertainment venue in San Francisco that not only successfully supported the opening of the Metreon complex, but helped meet company goals to diversify the supplier base.

In addition to helping companies leverage strategic partnerships, TEG provides guidance to companies and organizations in such diverse areas as enhancing strategic philanthropy programs, building on existing employee volunteer programs to reinforce brand image, and business planning, development, and analysis.

<http://www.winwinpartner.com/Expert%20Resources/Resources%20D-F/rpTEG.html>

Center for Responsible Business (Haas School of Business at UC Berkeley)

Mission:

To educate their stakeholders on the roles and responsibilities of business in society through research, teaching, experiential learning, and outreach.

To integrate the discipline of corporate responsibility into the general management core.

To act as a catalyst in creating a new generation of business leaders who are committed to and knowledgeable about corporate responsibility.

To serve as an educational center that bridges research, theory, and practice of corporate responsibility.

www.haas.berkeley.edu/responsiblebusiness/

Council for Economic Priorities (CEP)

CEP publishes corporate reports, gives yearly corporate responsibility awards, started the Campaign for Cleaner Corporations and provides corporate social responsibility research for investors. CEP also provides Global corporate ratings, News Update Service, Corporate Environmental Data Clearinghouse (CEDC).

www.web.net/~robrien/papers/sri/players/cep.html

The UN Global Compact

Through the power of collective action, the Global Compact seeks to advance responsible corporate citizenship so that business can be part of the solution to the challenges of globalization. In this way, the private sector – in partnership with other social actors – can help realize the Secretary-General’s vision: a more sustainable and inclusive global economy.

www.unglobalcompact.org/Portal/

Saltwater Institute

Mission:

To research, develop and market continuous, experience-based learning models for use in values-centered leadership and organizations;

To teach leaders the craft of integrating organizational, financial, and social good through a practicum called THE SEVEN INTENTIONS® of Values-Centered Leadership;

To create an ongoing fellowship of Seven Intentions practitioners and teams that provide opportunities for sharing values-centered experiences, stories, and best practices;

To evolve and improve their services through ongoing assessment, learning, and sharing of experience;

To collaborate and build alliances with all those exploring ways to shape for-profit and non-profit enterprises to integrate financial, organizational and social values;

To employ goodness, caring and celebration in all of their affairs as a demonstration of the added value created by the integration of social, organizational, and financial aims

www.saltwater.org

Corporate Citizenship Company (UK)

Mission:

Their mission is to help companies succeed as commercial entities by being active corporate citizens, so meeting the aspirations of their diverse stakeholders and the wider society of which they are a part.

As a consultancy working in the for-profit sector, they achieve their mission when they meet the needs of their clients - that is the focus of everything they do. They accept assignments when can be sure of offering a quality service, where their work can make a difference and where they can build an enduring relationship.

www.corporate-citizenship.co.uk

Centre for Innovation in Corporate Responsibility

Mission:

The Centre for Innovation in Corporate Responsibility's mission is to lead and assist businesses in redefining and realizing responsible international business practice. It aims to work in partnership with businesses working in or with developing countries to enhance business performance through sound corporate citizenship and responsible international business practices focused on sustainable human development.

www.cicr.net

The Conference Board (US & Canada)

As part of their mission to enhance the contribution of business to society, The Conference Board has been studying the interaction of corporations with their communities since 1916. In addition to their many research offerings in other areas of corporate citizenship, such as community relations and corporate contributions, their Townley Global Management Center for Environment, Health & Safety provides senior executive networking and research on leading practices in global EH&S management and approaches to sustainable development.

www.conference-board.org/knowledge/citizenship.cfm

The Conference Board of Canada has longstanding expertise in governance and CSR. It provides insights based on research, analysis, and interaction with members, and delivers those insights through conferences, networks, seminars, published reports, management tools, roundtables and customized services.

www.conferenceboard.ca/GCSR/

Imagine (Canada)

- Imagine is Canada's national program to promote public and corporate giving, volunteering and support for the community.
- is the only program in Canada that is specifically geared to encourage and promote partnerships between the corporate and charitable sectors.
- develops standards for corporate citizenship and philanthropy that are realistic and credible for both corporations and the community.
- is internationally recognized as a world leader in the promotion of philanthropy and corporate citizenship.

<http://www.ccp.ca/display.asp?id=30>

Canadian Business for Social Responsibility (CBSR)

As Canada's leading voice for corporate social responsibility (CSR), CBSR's goal is to support business in their effort to implement higher standards of social and environmental responsibility. CBSR's member companies are among Canada's leaders and as such, are

committed to developing, sharing and implementing corporate social responsibility best practices. They invite you to join a dynamic network of companies who are changing the way business does business.

www.cbsr.bc.ca

SustainAbility (UK)

Who - or what - is SustainAbility?

They are a strategic management consultancy and think-tank. Founded in 1987, they are the longest established international consultancy dedicated to promoting the business case for sustainable development.

Their core business is consultancy, but they also have major research programs and publish a range of reports and books. They also address conferences, seminars and workshops worldwide.

- Consultancy services.
- Research Programs.
- Publications.

They are a for-profit limited company, although many of their key goals are non-financial. These non-financial goals are spelled out in their Mission Statement, first produced in 1990.

- SustainAbility's mission statement.

SustainAbility is not a marketing or PR agency. Nor are they neutral in their work: they take a public stance on issues, which they think are important. Even so, they do help clients to develop strategies and products tailored to market needs and expectations, and the communication side of their work is enormously important.

www.sustainability.com

BITC – Business in the Community (UK)

Business in the Community is a unique movement of 700 member companies committed to continually improving their positive impact on society.

<http://www2.bitc.org.uk>

Prince of Wales International Business Leaders Forum (UK)

The Prince of Wales International Business Leaders Forum (www.iblf.org) was formed by HRH the Prince of Wales in 1990, as a focus for businesses around the world to work together in the global promotion and practical implementation of socially responsible business practices.

The Forum emphasizes the positive role business can play in addressing issues of global poverty, social inequity and environmental concerns, by taking a leadership role in responsible business practices. Its mission is "to promote international leadership in responsible business practices, to benefit business and society".

www.princeofwales.gov.uk/trusts/bus_forum.html

AccountAbility (Institute for Social & Ethical Accountability - UK)

AccountAbility is an international, not-for-profit, professional institute dedicated to the promotion of social, ethical and overall organizational accountability, a precondition for achieving sustainable development.

AccountAbility is dedicated to promoting accountability for sustainable development by:

- Creating a credible assurance standard and underlying accountability framework
- Providing quality professional development and certification
- Advocating an enabling public policy environment for organizational accountability
- Developing innovative 'ideas-for-action' through research and practice.

It is a democratic, multi-stakeholder membership organization with an innovative and inclusive governance structure to ensure that it can operate effectively and respond to the needs and aspirations of its membership.

www.accountability.org.uk/

Corporate Citizenship Unit at Warwick Business School (UK)

The Corporate Citizenship Unit (CCU) aims to become a globally recognized centre of excellence in the area of [research](#) and [teaching](#) in corporate citizenship by bringing together diverse people from business, government, and civil society organizations to examine changes in the relationship between corporations, states and communities. They recognize that the role, scope and purpose of business is changing rapidly as the global economy develops and that management priorities and business responsibilities are under scrutiny as never before.

<http://users.wbs.ac.uk/ccu/>

INSEAD's Centre for the Management of Environmental & Social Responsibility

CMER was established in 1992 as a specialized academic centre at INSEAD. Its charter is to conduct innovative research and to develop curriculum materials relevant to business and public sector stewardship of the environment. Over the last years CMER has undertaken an ambitious agenda for environmental and social sustainability concentrating on four major areas, namely: Environmental Economics and Policy, Industrial Ecology, Corporate Strategies for Sustainability and Sustainable Operations Management.

<http://www.insead.fr/CMER/>

Asbridge Centre for Business and Society (UK)

The Ashridge Centre for Business and Society (ACBAS) is a leading authority on relations between the corporate sector, government and civil society, with an emphasis on the changing role of business. The Centre is part of **Ashridge**, the international UK business school based north of London. ACBAS aims to further the debate on how issues of corporate governance, employee relations, supplier alliances, business values, environmental responsibility, and community investment and government relations impact upon the long-term viability of business.

www.acbas.org/

The Center for Corp. Citizenship at Boston College

The Center for Corporate Citizenship is a leading resource on corporate citizenship, providing research, executive education, consultation and convenings on citizenship topics. Their mission is to establish corporate citizenship as a business essential, with the goal that all companies act as economic and social assets by integrating social interests with other core business objectives.

www.bc.edu/centers/ccc/

Triple P Performance Centre (The Netherlands)

Mission:

The Triple P Performance Centre stimulates the transition process towards sustainable development, through increasing the effectiveness of Socially Responsible Investing, improving transparency and stimulating the development of Corporate Social Responsibility.

www.triple-p.org/

Global Futures Foundation

The Mission of Global Futures Foundation is to resolve conflicts and unify business, social, and environmental interests. We do so by helping discover true common ground, forging productive partnerships, and together developing programs and policies designed for the next century, not the last one.

http://www.globalff.org/Global_FF/frm-gff.htm

Resource Organizations

Accion Empresarial (Chili)

Acción Empresarial is a non-profitable organization that arises from the enterprise sector Chilean, with the purpose of promoting Responsibility of Social Enterprise (RSE)

between the companies that operate in the country. They understand the RSE is like a new vision of businesses that integrates harmonically the respect by the ethical values, the people, the community and the environment.

www.accionempresarial.cl/home/home.html

Empresa (The Americas)

Empresa is a hemispherical alliance of enterprise organizations that promotes the Responsibility of Social Enterprise (RSE) in the Americas.

www.empresa.org

Instituto Ethos (Brazil)

Ethos offers its clients the security of a company that has conquered its share of the Brazilian market over the course of the last decade, with a performance characterized by ethical conduct and technical excellence.

They started off the new millennium with a solid track record in opinion, market and organizational research associated with a capacity for constant updating with respect to new research approaches and technologies

www.ethos.com.br/maining/differentials.htm

Fundacion Esquel (Ecuador)

The Esquel Foundation is a non-profitable private organization that strives to contribute to sustainable human development, the improvement of the quality of life of poor people and the construction of a democratic and solitary society.

www.esquel.org

Japan Business Federation

Japan Business Federation is a comprehensive economic organization born in May 2002 by amalgamation of Keidanren (Japan Federation of Economic Organizations) and Nikkeiren (Japan Federation of Employers' Associations). Its membership of 1,584 is comprised of 1,268 companies including 79 foreign ownership, 126 industrial associations, and 47 regional employers' associations (as of May 31, 2003).

Mission of the Federation is to achieve a private sector-led, vital and affluent economy and society in Japan, for which it will demonstrate its leadership and in setting the path for the country. Establishment of free, fair, and transparent market economy under the principles of self-responsibility is essential. This should lead to recovery of national economy into hands of the private sector in seeking healthy growth of both Japan's and global economy.

<http://www.keidanren.or.jp/>

MAALA (Israel)

MAALA - Business for Social Responsibility in Israel is a non-profit membership organization, founded in September 1998, to promote the concepts of corporate citizenship and social responsibility in Israel's business arena.

Objectives:

- Develop public awareness towards "good corporate citizenship"
- Develop appreciation of "good companies" in various sectors (business, decision makers, politicians, media, consumers, workers)
- Increase the Israeli business sector's scope of social investment
- Increase the number of companies with a strategic approach to their role in society
- Introduce standards for corporate social investment
- Transform Corporate Social Responsibility (CSR) into a recognized managerial profession
- Create a network of CSR professionals within the business community

www.maala.org.il/site/EN/maala.asp?pi=210

Peru 2021

This case study will describe the emergence and experience of Peru 2021 in establishing a new role for business in Peruvian society: its attempts to raise awareness of the need for business to contribute in many more ways to the cohesion and sustainability of Peruvian society, and build consensus for change within the business sector; its efforts to articulate a compelling vision of a prosperous, equitable society which both motivates and convinces other groups within society; and its initial attempts to take concepts of social and environmental responsibility and make them operational. The final section will raise key questions and challenges facing Peru 2021.

www.colorado.edu/IBS/EB/PBESR/CASES/peru2021.html

Philippine Business for Social Progress

Vision:

To be the leader in promoting business sector commitment to social development

Mission:

PBSP, as a corporate-led Foundation, is committed to making strategic contributions to improve the quality of life of the Filipino poor; promoting business sector commitment to social development; and harnessing resources for innovative programs that lead to self-reliance and sustainable development.

In pursuit of these endeavors, the Foundation shall support broad-based partnerships and develop a corps of dedicated and competent social development practitioners.

Goals:

Initiate, assist & fund innovative socio-economic and environmentally sound, gender-sensitive development programs Promote self-reliance & entrepreneurship among underprivileged Innovate, validate & disseminate technologies supportive of sustainable development Encourage, undertake & sustain broad-based partnerships to optimize resources Strengthen organizational capabilities of partners through consultancies & training for effective program implementation Professionalize the social development industry by promoting human resource development systems and programs Broaden & deepen corporate citizenship through involvement of business in development programs

www.pbsp.org.ph

CSR Europe

CSR Europe is a business-driven membership network. Their mission is to help companies achieve profitability sustainable growth and human progress by placing corporate social responsibility in the mainstream of business practice.

Their objectives

- To promote the business case for corporate social responsibility, by providing over 500,000 business people and partners with print and online publications, best practices and tools, annually.
- To offer business managers learning, benchmarking, and capacity building opportunities.
- To energize a broader stakeholder dialogue between businesses, European policy makers, governments, investors, social partners, civil society and academics.

Through their 60 company members, 18 national partner organizations, their thematic work and dialogue and their online CSR info centre, CSR Europe has become the major European reference point on corporate social responsibility strategies and practices for companies.

www.csreurope.org

African Institute of Corporate Citizenship (AICC)

The African Institute of Corporate Citizenship (AICC) is a centre of excellence in corporate social responsibility. Established as a Section 2, non for profit, company, they are committed to leading Africa's corporate citizenship practice through the development of tailored, solution-oriented consultancy, working with companies and organizations looking at the integration of corporate citizenship values into core business strategy. AICC strongly supports learning networks that promote advocacy and research into more effective multi-sector corporate social engagement.

www.aiccglobal.com

The Prime Minister's Community Business Partnerships (Australia)

The Prime Minister's Community Business Partnership is comprised of a group of prominent Australians from the community and business sectors, appointed by the Prime Minister in 1999 to advise and assist the Government on issues concerning community business collaboration.

The Partnership aims to develop and promote a culture of corporate and individual social responsibility.

www.partnership.zip.com.au/

European Institute for Business Ethics (The Netherlands)

The EIBE / Institute for Responsible Business is an independent, academic, non-commercial organization whose aim is to:

- develop, implement, and transfer research, through education, training, consultancy and information services
- do so on the basis of a clear vision of the ethical foundation of economic and organizational activities
- enhance ethical awareness; the assessment of processes and outcomes; the adjustment of structures, culture and technologies; and to increase ethical accountability
- do so within Europe-based business organizations, governmental agencies and non-governmental organizations

EIBE hopes to stimulate the ethical debate in business and society and thereby help to construct a better place to work and live.

In pursuing this aim, the Institute recognizes a special bond between members of the European Business Ethics Network (EBEN) and academics to stimulate the study of business ethics and the proliferation of its results on a co-operative basis.

<http://www.nijenrode.nl/index.cfm?section=research&page=researchindex>

The Corporate Citizenship Research Unit - Deakin Univ. (Australia)

Mission:

Their mission is to research and develop innovative corporate citizenship solutions that assist in the sustainability of business and society. Critical analysis in this area is essential, and the CCRU sees as a principle aim, the development of both theory and practice, through research and scholarship, of the critical frameworks, language and methodologies required to better enable corporate citizenship across all sectors of society to develop - always mindful of the scholarly context, but striving all the time to secure significant social change.

www.deakin.edu.au/fac_arts/centres/ccr/

Grupo de Institutos, Fundações e Empresas (Brazil)

GIFE - Group of Institutes, Foundations and Enterprises - is the first South American association of grantmakers, uniting privately held organizations that fund or operate social, cultural and environmental projects of public interest.

GIFE significantly focuses on developing solutions to overcome Brazil's social inequalities, whereby its strategic objective resides in influencing public policy by means of partnerships and the sharing of ideas, actions and experiences with the State and other civil society organizations.

In pursuing this objective, GIFE bases its work on political-institutional strengthening, empowering and supporting strategic initiatives of its members and that of other organizations, especially those of a business nature.

www.gife.org.br

International Business Ethics Institute

The International Business Ethics Institute is a 501(c)(3) private, nonprofit, nonpartisan, educational organization. The Institute was founded in 1994 in response to the growing need for transnationalism in the field of business ethics. The Institute is located in Washington, DC, with an affiliate office in London.

The Institute promotes business ethics and corporate responsibility through two key program areas. First, it works to increase public awareness and dialogue about international business ethics issues through such educational resources and activities as the Roundtable Discussion Series, the *International Business Ethics Review* and this website. Second, the Institute works closely with companies to assist them in establishing effective international ethics programs. The Institute is dedicated to disseminating business ethics information to demonstrate the positive, tangible changes that responsible business can generate.

<http://www.business-ethics.org/>

Initiatives

The Global Reporting Initiatives (GRI)

The Global Reporting Initiative (GRI) is a multi-stakeholder process and independent institution whose mission is to develop and disseminate globally applicable Sustainability Reporting Guidelines. These Guidelines are for voluntary use by organizations for reporting on the economic, environmental, and social dimensions of their activities, products, and services. The GRI incorporates the active participation of representatives from business, accountancy, investment, environmental, human rights, and research and labor organizations from around the world. Started in 1997 by the Coalition for Environmentally Responsible Economies (CERES), the GRI became independent in

2002, and is an official collaborating centre of the United Nations Environment Program (UNEP) and works in cooperation with UN Secretary-General Kofi Annan's Global Compact.

www.globalreporting.org

Global Corporate Citizenship Initiative (WEF)

Corporate citizenship can be defined as the contribution a company makes to society through its core business activities, its social investment and philanthropy programs, and its engagement in public policy. The manner in which a company manages its economic, social and environmental relationships, as well as those with different stakeholders, in particular shareholders, employees, customers, business partners, governments and communities determines its impact.

www.weforum.org/site/homepublic.nsf/Content/Global+Corporate+Citizenship+Initiative

The Corporate Impact Reporting Initiative

Responsible companies are trying harder than ever to determine what they should be measuring and reporting so that they can improve and communicate their impact on society. And yet, research has shown that the quality of information provided by companies is rated poorly by the City.

The Corporate Impact Reporting website, launched in December 2001, is a joint project of Business in the Community (BITC) and the Business Impact Review Group, comprising twenty companies who are working together to develop a common approach to social and environmental reporting.

www.corporate-impact.org/

AA 1000

Accountability 1000 (AA1000) is the work of ISEA - the Institute for Social and Ethical Accountability. ISEA (also known as AccountAbility) is an international membership organization, based in the UK. It exists to encourage ethical behavior in business and non-profit organizations.

AA1000 is promoted as a standard for the measuring and reporting of ethical behavior in business. It provides a framework that organizations can use to understand and improve their ethical performance, and a means for others to judge the validity of claims to be ethical.

It aims to assist an organization in the definition of goals and targets, the measurement of progress made against these targets, the auditing and reporting of performance and in the establishment of feedback mechanisms.

<http://www.mallenbaker.net/csr/CSRfiles/AA1000.html>

SA 8000

The Council on Economic Priorities Accreditation Agency has driven the development of Social Accountability 8000 (SA8000) a system that defines a set of auditable standards and an independent auditing process for the protection of workers' rights

www.citinv.it/associazioni/CNMS/archivio/lavoro/Presentazione_SA8000.html

Future 500 Corporate Accountability Practices (CAP) Gap Audit

The Corporate Accountability Practices (CAP) Gap Audit is a consolidated assessment that ranks corporate performance in accountability according to the criteria of 14 leading systems of standards, in a single, easy-to-use tool.

www.future500.org

Greenhouse Gas Protocol

The GHG Protocol Initiative is working to develop internationally accepted accounting and reporting standards for companies and other entities to report their GHG emissions. The participants are working in partnership to design, disseminate and promote the use of globally applicable accounting and reporting standards for GHG emissions.

www.ghgprotocol.org/

Beyond Grey Pinstripes

While business leaders believe sustainable development is important to the future of their firms, many think they are not successfully addressing the challenge because top managers have neither the inclination nor the training to manage social and environmental concerns.

The Beyond Grey Pinstripes (BGP) project seeks to build programs to educate future business managers to handle complex social issues and provide stewardship of natural resources by examining how well business schools train the next generation of managers to integrate these concerns in business education.

www.beyondgreypinstripes.org/

State of Corporate Citizenship Survey (Hitachi Foundation et al)

The survey will identify:

- How companies define corporate citizenship and their attitudes toward corporate citizenship

- Regional and geographic differences in the practice of corporate citizenship and model practices
- Progress in the corporate citizenship movement and different stages of corporate development
- Trends and forces currently influencing corporate citizenship
- Forecasts and expectations regarding the development of corporate citizenship

www.uschamber.com/cc/citizenship/survey.htm

CSR Benchmarking Program (Imagine, Conference Board of Canada Canadian BITC)

Corporate Social Responsibility (CSR) and Corporate Citizenship (CC) are about the overall relationship of a company with its stakeholders. These include customers, employees, communities, government, suppliers and competitors.

The CSR Assessment Tool is a self-assessment tool that will provide "one stop shopping" for companies that need a comprehensive management assurance tool to assess their CSR performance. Drawing from the major international codes, standards and statements of principles, the CSR Assessment Tool is uniquely tailored to the Canadian business context.

www.imagine.ca/content/imagine_in_action/csr_benchmarking.asp?section=action

The UN Global Compact Source Book

Global Compact participant companies of all sizes and from all industries and regions have expressed their need for practical information about tools to help them implement the nine Global Compact principles. In response to this need, the Global Compact is developing a Source Book of tools, case studies, information and resources. The Source Book, which is being developed with assistance from a range of organisations, especially the World Business Council for Sustainable Development and Business for Social Responsibility, is expected to be published in June 2004.

<http://www.unglobalcompact.org/Portal/>

European Corporate Sustainability Framework

The objective of the international ECSF consortium is to accommodate the corporate community, challenged to meet changing (societal) circumstances, by developing a business framework and a set of related tools, in order to facilitate the corporation's new role within society (Corporate Social Responsibility) and the transformation towards Corporate Sustainability.

<http://www.ecsf.info/ecsf/>

Corporate Social Responsibility (CSR)

Guidelines/Standards/Codes of Conduct

General

GRI Sustainability Reporting Guidelines

The Global Reporting Initiative (GRI) is a multi-stakeholder process and independent institution whose mission is to develop and disseminate globally applicable Sustainability Reporting Guidelines. These Guidelines are for voluntary use by organizations for reporting on the economic, environmental, and social dimensions of their activities, products, and services. The GRI incorporates the active participation of representatives from business, accountancy, investment, environmental, human rights, and research and labor organizations from around the world. Started in 1997 by the Coalition for Environmentally Responsible Economies (CERES), the GRI became independent in 2002, and is an official collaborating centre of the United Nations Environment Program (UNEP) and works in cooperation with UN Secretary-General Kofi Annan's Global Compact.

www.globalreporting.org/guidelines/2002.asp

CERES Principles

Today, it is often difficult for corporations, activists and socially responsible investors to have honest, meaningful dialogue on corporations' environmental and social practices. CERES provides an innovative forum for this kind of exchange and a unique opportunity for real accountability and real results.

CERES is...

The leading U.S. coalition of environmental, investor, and advocacy groups working together for a sustainable future

Companies that have committed to continuous environmental improvement by endorsing the CERES Principles, a ten-point code of environmental conduct

A common ground where groups with widely different backgrounds, assumptions, and visions find concrete solutions to today's environmental challenges

www.ceres.org/our_work/principles.htm

ISO 14000/1

A complimentary method for achieving environmental protection is to use internal standards. This enables a company to integrate quality management systems within their business operations without relying solely on external laws. This is the basis for the ISO 14000 environmental management standards.

www.iso14000.com/

Caux Round Table “Principles for Business”

The Caux Round Table believes that the world business community should play an important role in improving economic and social conditions. As a statement of aspirations, this document aims to express a world standard against which business behavior can be measured. They seek to begin a process that identifies shared values, reconciles differing values, and thereby develops a shared perspective on business behavior acceptable to and honored by all.

www.cauxroundtable.org/ENGLISH.HTM

The Global Sullivan Principles

In November 1999, more than 20 years after the adoption of the original Sullivan Principles, Leon Sullivan and United Nations Secretary General Kofi Annan launched the Global Sullivan Principles of Corporate Social Responsibility. These expanded principles call for multinational companies to play a much larger role in the advancement of human and still stands up against racism, against discrimination, and against social and economic injustice.

www.revleonsullivan.org/principled/global.htm

The ICCR Global Principles

Global Principles is a document produced by the Interfaith Center on Corporate Responsibility, a North American association of 275 Protestant, Roman Catholic and Jewish institutional investors. It presents a set of global standards for corporate responsibility to encourage dialogue and changes in company policies and practices. The document is available to groups working on corporate responsibility and to companies seeking to respond to the challenges of doing business in the global economy.

www.admc-op.org/global.html

The Sunshine Standards for Corporate Reporting to Stakeholders

The Sunshine Standards provide direction for corporate reporting to stakeholders. Stakeholders include employees, customers, communities, suppliers, and others who contribute significantly to the success of the corporation, or are affected significantly by its actions.

www.stakeholderalliance.org/sunstds.html

The Keidanren Charter for Good Corporate Behavior

During the five years that have elapsed since the previous Charter for Good Corporate Behavior was announced, various problems concerning corporate behavior have arisen and public distrust of corporations has intensified. At the same time, the global business environment has undergone major changes, which they list below. Having reviewed corporate behavior in view of these circumstances, Keidanren has decided to revise the Charter of 1991 in order to articulate the kind of corporate behavior that truly enriches and vitalizes civil society as they approach the twenty-first century.

www.keidanren.or.jp/english/policy/po1052.html

American Apparel Manufacturers Association Code

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www.web.net/~tccr/benchmarks/rsp-AAMA.htm

Fair Labor Association Code

The FLA was established as an independent monitoring system that holds its participating companies accountable for the conditions under which their products are produced. To advance fair, decent and humane working conditions, the FLA enforces an industry-wide Workplace Code of Conduct, which is based on the core labor standards of the International Labor Organization (ILO).

www.fairlabor.org/all/code/

Worker Rights Consortium Code

The University will be committed to conducting their business affairs in a socially responsible and ethical manner consistent with their respective educational research and/or service missions, and to protecting and preserving the global environment. Once the university adopted the following Code of Conduct (the "Code") that requires that all Licensees, at a minimum, adhere to the principles set forth in the Code.

www.service.ohio-state.edu/students/USAS/codeofc.htm

ILO Conventions

The International Labor Organization is the UN specialized agency which seeks the promotion of social justice and internationally recognized human and labor rights. It was founded in 1919 and is the only surviving major creation of the Treaty of Versailles, which brought the League of Nations into being, and it became the first specialized agency of the UN in 1946.

The ILO formulates international labor standards in the form of Conventions and Recommendations setting minimum standards of basic labor rights: freedom of association, the right to organize, collective bargaining, abolition of forced labor, equality of opportunity and treatment, and other standards regulating conditions across the entire spectrum of work related issues. It provides technical assistance primarily in the fields of:

- vocational training and vocational rehabilitation;
- employment policy;
- labor administration;
- labor law and industrial relations;
- working conditions;
- management development;
- cooperatives;
- social security;
- labor statistics and occupational safety and health.

It promotes the development of independent employers' and workers' organizations and provides training and advisory services to those organizations. Within the UN system, the ILO has a unique tripartite structure with workers and employers participating as equal partners with governments in the work of its governing organs.

<http://webfusion.ilo.org/public/db/standards/normes/index.cfm?lang=EN>

SA 8000

The Council on Economic Priorities Accreditation Agency has driven the development of Social Accountability 8000 (SA8000) a system that defines a set of auditable standards and an independent auditing process for the protection of workers' rights.

http://www.citinv.it/associazioni/CNMS/archivio/lavoro/Presentazione_SA8000.html

AA 1000

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It aims to assist an organization in the definition of goals and targets, the measurement of progress made against these targets, the auditing and reporting of performance and in the establishment of feedback mechanisms.

<http://www.mallenbaker.net/csr/CSRfiles/AA1000.html>

United Nations Global Compact (UNGC)

The Global Compact is a voluntary corporate citizenship initiative with two objectives:

- Mainstream the nine principles in business activities around the world
- Catalyze actions in support of UN goals

To achieve these objectives, the Global Compact offers facilitation and engagement through several mechanisms: Policy Dialogues, Learning, Local Structures and Projects.

<http://www.unglobalcompact.org/Portal/>

OECD Guidelines for Multinationals

The OECD Guidelines for Multinational Enterprises are non-binding recommendations to enterprises, made by the thirty-seven governments that adhere to them. Their aim is to help Multinational Enterprises (MNEs) operate in harmony with government policies and with societal expectations.

www.oecd.org/home/0,2605,en_2649_34889_1_1_1_1_1,00.html

The Good Corporation Charter

GoodCorporation was set up to provide a framework and accreditation process for socially responsible behavior that is accessible by all types and sizes of organization

www.goodcorporation.com/en/

The Fair Labor Association (FLA) Workplace Code of Conduct

The Fair Labor Association (FLA) is a non-profit organization combining the efforts of industry, non-governmental organizations (NGOs), colleges and universities to promote adherence to international labor standards and improve working conditions worldwide

www.fairlabor.org

The Equator Principles

The Equator Principles are a framework for banks to manage environmental and social issues in project financing.

www.equator-principles.com

Boston College Center for Corporate Citizenship Standards of Excellence

The Standards of Excellence are our framework for managing your company's corporate community involvement. Designed to help you link your corporation's community activities to core business goals, the seven management practices, processes, and policies set a global standard for excellence in corporate citizenship.

http://www.bc.edu/centers/ccc/Pages/soe_tool.html

Ethics

SVN Standards of Corporate Social Responsibility

The Social Venture Network (SVN) Standards of Corporate Responsibility was published in 1999. It was created through the collaborative work of several SVN members in response to the growing consensus that companies and organizations have a social obligation to operate in ethically, socially, and environmentally responsible ways. SVN members, many of whom were and continue to be, the pioneers in the movement to do well while doing good, have built successful, socially responsive businesses and thought it worthwhile to share those experiences with others. Indeed, these SVN pioneers, along with business leaders everywhere, are seeking tools to improve both the social and financial performance of their organizations.

www.svn.org/initiatives/PDF_standards.pdf

Council of Better Business Bureaus Codes

The Better Business Bureau (BBB) system in the U.S. extends over 98% of the nation; coast-to-coast, and in Hawaii, Alaska, and Puerto Rico.

Since the founding of the first BBB in 1912, the BBB system has proven that the majority of marketplace problems can be solved fairly through the use of voluntary self-regulation and consumer education.

www.bbb.org

www.canadiancouncilbbb.ca/ontariobbb.html

International Chamber of Commerce (ICC) Business Principles

As a consequence of changing social attitudes, concerns about possible impacts of globalization and increasing expectations of business' role in society, companies are increasingly making their values more explicit in the form of business principles, which set out how they carry out their business. The purpose of this paper is to provide practical advice to ICC members on how to approach the issue of business principles, to situate individual company principles in the existing framework of generic business principles, government codes and new such initiatives, as well as broader societal values.

http://www.iccwbo.org/home/statements_rules/statements/2000/responsible_business_conduct.asp

Quality Scoring Framework

The Quality Scoring Framework (QSF) is based upon eight quality principles of the social and ethical accounting, auditing and reporting. These have been developed by the New Economics Foundation and adapted by the Institute of Social and Ethical AccountAbility for AA1000, its voluntary accountability standard.

The eight principles are:

- Inclusivity
- Comparability
- Completeness
- Evolutionary
- Embeddedness
- Communication
- External verification
- Continuous improvement

<http://www.antsite.com/off/camelot/18scor.htm>

CSR and Ethics Compliance Standard 2000 (Japan)

ECS2000 was formulated as a Japanese business standard in 1999.

http://www.iso.org/iso/en/commcentre/presentations/wkshps-seminars/copolco/copolco2002/cop2002proceedings/cop2002_92IwaoTaka.pdf

Human Rights

Universal Declaration of Human Rights (UDHR)

On December 10, 1948 the General Assembly of the United Nations adopted and proclaimed the Universal Declaration of Human Rights the full text of which appears in the following pages. Following this historic act the Assembly called upon all Member countries to publicize the text of the Declaration and "to cause it to be disseminated, displayed, read and expounded principally in schools and other educational institutions, without distinction based on the political status of countries or territories."

www.un.org/Overview/rights.html

Draft UN Human Rights Guidelines for Companies

General Obligations:

While governments have the primary obligation to respect, ensure respect for, and promote internationally recognized human rights, companies also have the obligation to respect, ensure respect for, and promote international human rights within their respective spheres of activity and influence.

Nothing in these Guidelines shall diminish the human rights obligations of governments.

<http://www1.umn.edu/humanrts/links/draftguidelines-ad1.html>

Amnesty International Human Rights Principles for Companies

Amnesty International (AI) is a worldwide movement of people who campaign for internationally recognized human rights.

AI's vision is of a world in which every person enjoys all of the human rights enshrined in the [Universal Declaration of Human Rights](#) and other international human rights standards.

In pursuit of this vision, AI's mission is to undertake research and action focused on preventing and ending grave abuses of the rights to physical and mental integrity, freedom of conscience and expression, and freedom from discrimination, within the context of its work to promote all human rights.

AI is independent of any government, political ideology, economic interest or religion. It does not support or oppose any government or political system, nor does it support or oppose the views of the victims whose rights it seeks to protect. It is concerned solely with the impartial protection of human rights.

AI has a varied network of members and supporters around the world. At the latest count,

there were more than 1.5 million members, supporters and subscribers in over 150 countries and territories in every region of the world. Although they come from many different backgrounds and have widely different political and religious beliefs, they are united by a determination to work for a world where everyone enjoys human rights.

AI is a democratic, self-governing movement. Major policy decisions are taken by an International Council made up of representatives from all national sections.

AI's national sections and local volunteer groups are primarily responsible for funding the movement. No funds are sought or accepted from governments for AI's work investigating and campaigning against human rights violations.

www.amnesty.org

Ethical Trading Initiative (ETI) Base Code

The Ethical Trading Initiative is an alliance of companies, non-governmental organizations and trade union organizations committed to working together to identify and promote good practice in the implementation of codes of labor practice.

ETI's members believe that this collaborative approach provides the opportunity for making significant progress in promoting the observance of internationally recognized labor standards, in particular fundamental human rights throughout global supply chains.

ETI's members want to ensure that the working conditions of employees in companies that supply goods to consumers in the UK meet or exceed international standards.

The special characteristics of ETI, and the reason it is well known internationally, are its tripartite structure and mode of operation, and its focus on learning rather than certification or labelling. This gives legitimacy to the lessons learned about the implementation and inspection of codes of labor practice.

ETI is NOT an accreditation agency nor does it perform external audits. It primarily exists to share experience and promote learning about implementing international labor standards in international supply chains.

www.eti.org.uk/pub/publications/basecode/main/index.shtml

Governance

OECD Principles of Corporate Governance

Corporate governance, the OECD Principles and their implementation, both in Member and non-member economies are the central areas of corporate affairs activities. The integrity of corporations, financial institutions and markets is particularly central to the health of their economies and their stability.

www.oecd.org/department/0,2688,en_2649_34813_1782203_1_1_1_1,00.html

Corporate Governance Forum Principles (Japan)

http://www.eccg.org/codes/country_pages/codes_japan.htm

Hampel Report

ACCA has heralded the Hampel report on corporate governance, published on 29 January 1998, as a step in the right direction but is concerned that it fails to address the key issue of business risk.

www.accaglobal.com/publications/corpsecrev/24/24841

NACD Blue Ribbon Commission Reports

The mission of the New York Chapter of the National Association of Corporate Directors (NACD) is to take a leadership role in enhancing director effectiveness by providing a forum in which educational content and peer interaction are joined. Meeting focus will combine the practical aspects of board service with the latest developments and best practices in corporate governance. The Chapter seeks to reflect diverse perspectives, including new and experienced directors, CEOs, and subject matter experts for both profit and nonprofit organizations. The Chapter also seeks to enhance the role of the NACD as the premier organization for boards and directors of U.S. business corporations, providing an authoritative voice and vital forum on matters of policy and practice.

www.nacdny.org

NYSE Corporate Governance Standards

http://www.nyse.com/pdfs/corp_gov_pro_b.pdf

<http://www.ffhsj.com/secreg/pdf/sc020821.pdf>

Ranking of Responsible Companies

Global Most Admired Companies (Fortune)

Despite the scandals that tarnished the reputation of business in 2002, there are companies to admire. Topping FORTUNE's annual poll of executives, directors, and analysts, Wal-Mart becomes the only company ever to head the most admired and FORTUNE 500 lists in the same year. The list's most notable trend? The increase in non-U.S. All-Stars.

www.fortune.com/fortune/globaladmired

The World's Most Respected Companies (Financial Times)

While there is little change at the top of this year's global survey of the most respected companies, the changes lower down reflect the degree to which perceptions have changed in the wake of upheavals in the new economy.

<http://specials.ft.com/wmr2001/index.html>

Best Corporate Citizens (Business Ethics 100)

The aim of the project is to identify firms that excel at serving a variety of stakeholders well. Our seven stakeholder groups are shareholders, plus six social stakeholders as identified by KLD: community, minorities and women, employees, environment, non-U.S. stakeholders, and customers. KLD gathers information on lawsuits, regulatory problems, pollution emissions, charitable contributions, staff diversity counts, union relations, employee benefits, awards, and so on. In each of six categories, KLD notes where companies have "strengths" and "concerns." To arrive at a net score in each category, we subtract concerns from strengths.

www.business-ethics.com/100best.htm#100%20Best%20Corporate%20Citizens%20of%202003

Malcolm Baldrige National Quality Award

The Baldrige Award is given by the President of the United States to businesses—manufacturing and service, small and large—and to education and health care organizations that apply and are judged to be outstanding in seven areas: leadership, strategic planning, customer and market focus, information and analysis, human resource focus, process management, and business results.

http://www.nist.gov/public_affairs/factsheet/baldfaqs.htm

Corporate Social Responsibility (CSR)

Leadership Examples

General

The Cooperative Bank (UK)

They will encourage business customers to take a pro-active stance on the Ecological Impact of their own activities and will invest in companies that avoid repeated damage to the environment.

In line with the principles of their Ecological Mission Statement they will not invest in any business or organization that, as a core activity relies on:

- The extraction or production of fossil fuels, which may contribute to problems such as global climate change and acid rain.
- The manufacture of chemicals which may contribute to problems such as ozone depletion or which may accumulate in nature.
- The unsustainable harvest of natural resources such as timber clearance, which may lead to deforestation.

<http://www.co-operativebank.co.uk/>

AVINA (Central America)

The AVINA Foundation works in partnership with civil society and business leaders in their initiatives toward sustainable development in Ibero-America.

www.avina.net/web/avinawebfinal3.nsf/LK_GCMask2/0~0~0~1?Open&LANG=Eng

Natura Cosméticos (Brazil)

Natura will be one of the leaders in its market, differentiating itself for the quality of the relations that establishes, for its beliefs and express values of radical form through products, services and enterprise behavior that promote the best relations.

www.natura.com./port/site.asp

Starbucks Coffee Co.

Mission:

Establish Starbucks as the premier purveyor of the finest coffee in the world while maintaining their uncompromising principles while they grow.

The following six guiding principles will help them measure the appropriateness of their decisions:

- Provide a great work environment and treat each other with respect and dignity.
- Embrace diversity as an essential component in the way they do business.
- Apply the highest standards of excellence to the purchasing, roasting and fresh delivery of their coffee.

- Develop enthusiastically satisfied customers all of the time.
- Contribute positively to their communities and their environment.
- Recognize that profitability is essential to their future success.

Environmental mission statement:

Starbucks is committed to a role of environmental leadership in all facets of their business.

They fulfill this mission by a commitment to:

- Understanding of environmental issues and sharing information with their partners.
- Developing innovative and flexible solutions to bring about change.
- Striving to buy, sell and use environmentally friendly products.
- Recognizing that fiscal responsibility is essential to their environmental future.
- Instilling environmental responsibility as a corporate value.
- Measuring and monitoring their progress for each project.
- Encouraging all partners to share in their mission.

www.info@starbucks.com

Hewlett-Packard

HP is a leading global provider of products, technologies, solutions and services to consumers and business. The company's offerings span IT infrastructure, personal computing and access devices, global services, and imaging and printing. Their \$4 billion annual R&D investment fuels the invention of products, solutions and new technologies so they can better serve customers and enter new markets. They invent, engineer and deliver technology solutions that drive business value, create social value and improve the lives of their customers.

<http://www.hp.com/>

Slimline Garments (Sri Lanka)

“To be the premier manufacturer in intimate apparel. Optimizing stakeholder return and being the best in class in people, products and processes, empowering all, in a participative, creative and continuously improving environment enhanced by the synergy of a team culture.”

www.slimline.lk

Pfizer

Mission:

They will become the world's most valued company to patients, customers, colleagues, investors, business partners, and the communities where they work and live.

Purpose:

They dedicate themselves to humanity's quest for longer, healthier, happier lives through innovation in pharmaceutical, consumer, and animal health products.

<http://www.pfizer.com/main.html>

Ford Motor Company

Vision:

To become the world's leading Consumer Company for automotive products and services.

Mission:

They are a global family with a proud heritage passionately committed to providing personal mobility for people around the world.

They anticipate consumer need and deliver outstanding products and services that improve people's lives.

<http://www.ford.com/en/default.htm>

The Body Shop (UK)

The purpose of the Foundation is to give financial support to pioneering, front line organizations who have little hope of conventional funding. Their focus is to assist those working to achieve sustainable progress in the areas of human and civil rights, environmental and animal protection.

Eleven years on, the Foundation has donated over £5 million in grants and gift-in-kind support, assisting the work of various worldwide organizations. In addition to the work, the Foundation covers UK administration costs for its two core projects; Brazilian Healthcare Project and children on the edge.

www.thebodyshop.com/web/tbsgl/values_tbsf.jsp

Novo Nordisk

Novo Nordisk is a focused healthcare company. With the broadest diabetes product portfolio in the industry, including the most advanced products within the area of insulin delivery systems, Novo Nordisk is a world leader in diabetes care. In addition, Novo Nordisk has a leading position in areas such as homeostasis management,

growth hormone therapy and hormone replacement therapy. Novo Nordisk manufactures and markets pharmaceutical products and services that make a significant difference to patients, the medical profession and society.

Vision:

Their Vision paints a picture of what Novo Nordisk wants to achieve as a company - their place in the market and their overall goals in relation to patients, society and employees.

www.novonordisk.com

Fannie Mae

At Fannie Mae, the home symbolizes who they are, too. Their public mission, and their defining goal, is to help more families achieve the American Dream of homeownership.

They do that by providing financial products and services that make it possible for low-, moderate-, and middle-income families to buy homes of their own. Since Fannie Mae began in 1968 they have helped more than 49 million families achieve the American Dream of homeownership.

They are proud of what they have accomplished. More Americans own homes today than at any time in history. As the leader of the housing finance system, Fannie Mae is working to expand homeownership opportunities by creating products and technologies that help more people own homes. They believe that by doing so, they make a positive contribution to families, communities, and the nation.

www.fanniemae.com

Tom's of Maine

Mission:

To serve their customers by providing safe, effective, innovative, natural products of high quality.

To build relationships with their customers that extends beyond product usage to include full and honest dialogue, responsiveness to feedback, and the exchange of information about products and issues.

To respect, value, and serve not only their customers but also their co-workers, owners, agents, suppliers, and their community; to be concerned about and contribute to peoples well-being, and to operate with integrity so as to be deserving of people's trust.

To provide meaningful work, fair compensation, and a safe, healthy work environment that encourages openness, creativity, self-discipline, and growth.

To contribute to and affirm a high level of commitment, skill, and effectiveness in the work community.

To recognize, encourage, and seek a diversity of gifts and perspectives in their worklife.

To acknowledge the value of each person's contribution to their goals and to foster teamwork in their tasks.

To be distinctive in products and policies which honor and sustain our natural world.

To address community concerns, in Maine and around the globe, by devoting a portion of their time, talents, and resources to the environment, human needs, the arts, and education.

To work together to contribute to the long-term value and sustainability of their company.

To be a profitable and successful company while acting in a socially and environmentally responsible manner.

To create and manage a system of accountability which holds each person in the Company's employment or governance responsible for individual behavior and personal performance consistent with the Company's Beliefs, Mission, Destiny, Performance Goals, and Individual Work Plans.

www.toms-of-maine.com

Unilever

At Unilever they are dedicated to meeting the everyday needs of people everywhere. They provide washing powder, shampoo and toothpaste, teas, ice cream, oils and spreads for consumers all over the world

www.unilever.com

Ben & Jerry's

Ben & Jerry's is founded on and dedicated to a sustainable corporate concept of linked prosperity. Their mission consists of 3 interrelated parts:

Product Mission

To make, distribute & sell the finest quality all natural ice cream & euphoric concoctions with a continued commitment to incorporating wholesome, natural ingredients and promoting business practices that respect the Earth and the Environment.

Economic Mission

To operate the Company on a sustainable financial basis of profitable growth, increasing

value for their stakeholders & expanding opportunities for development and career growth for their employees.

Social Mission

To operate the company in a way that actively recognizes the central role that business plays in society by initiating innovative ways to improve the quality of life locally, nationally & internationally.

Central To The Mission Of Ben & Jerry's

is the belief that all three parts must thrive equally in a manner that commands deep respect for individuals in and outside the company and supports the communities of which they are a part.

www.benjerry.com

Odwalla

Vision:

In 1992, almost 80 Odwalla employees helped create the company's vision and core values statements - the articulation of how they want to do business and what they want their business focus to be. Since then, the vision and values have served as guiding beacons in their decision making processes and as tools to help each of them remember their shared vision and strive to embody the core values in all their actions at Odwalla.

www.odwalla.com

Just Desserts

Just Desserts is the product of a shared passion and dream — envisioned by Gail and Elliot and practiced every day by the committed employees of Just Desserts. The passion is for making and enjoying delicious desserts. The dream is building a company that succeeds in doing well by doing good.

www.justdesserts.com

Chiquita

Corporate Responsibility at Chiquita is an integral part of our global business strategy. It commits us to operate in a socially responsible way everywhere we do business, fairly balancing the needs and concerns of our various stakeholders - all those who impact, are impacted by, or have a legitimate interest in the Company's actions and performance. We believe that fairly balancing the expectations of our stakeholders is essential to building a stronger and more financially successful Company.

www.chiquita.com

Novartis

Mission/Purpose:

They want to discover, develop and successfully market innovative products to cure diseases, to ease suffering and to enhance the quality of life. They also want to provide a shareholder return that reflects outstanding performance and to adequately reward those who invest ideas and work in their company.

www.novartis.com

Patagonia

Our definition of quality includes a mandate for building products and working with processes that cause the least harm to the environment. We evaluate raw materials, invest in innovative technologies, rigorously police our waste and use a portion of our profits to support groups working to make a real difference. We acknowledge that the wild world we love best is disappearing. That is why those of us who work here share a strong commitment to protecting undomesticated lands and waters. We believe in using business to inspire solutions to the environmental crisis.

www.patagonia.com

Johnson & Johnson

Through [Our Credo](#), Johnson & Johnson is committed to improving the community through a variety of programs both in the United States and abroad. In this section, you can learn about our Contributions program, Environmental commitments and Health and Safety efforts. You can also review our [policies](#) on Equal Opportunity, child labor, business conduct and other key issues. Our [Corporate Information](#) section will acquaint you with our financial performance and overall structure, while [Corporate Governance](#) will explain the practice of ethical business conduct. There is also information about the [Board of Directors](#) and the [Committees of the Board](#).

Through our [contributions](#) efforts, we are actively involved in supporting ongoing health care, educational and cultural programs. We are committed to a healthy [environment](#) through a reduction in our facility environmental impacts and our participation in conservation projects. Johnson & Johnson has established high standards for the [health and safety](#) of our workers and has worked with others in our community to share our knowledge in this area.

<http://www.jnj.com/community/index.htm;jsessionid=2X1VPTGJRLNU4CQPCCECZOYKB2IIWNSC>

Seventh Generation

Seventh Generation is the nation's leading brand of non-toxic and environmentally safe household products. With distribution in thousands of natural product and grocery stores nationwide, we've become the authority when it comes to products that protect your health and the planet. We've also won over 15 major awards that recognize our efforts to preserve the environment.

<http://www.seventhgeneration.com/>

Barclay's Bank (UK)

Barclays strategy is founded on creating a virtuous circle of satisfied stakeholders. We believe that value is created and maximised when we meet the needs of shareholders, customers, employees, and the communities where we live and work. That's why we take Corporate Social Responsibility (CSR) seriously.

We have published a detailed review of our CSR performance last year in our CSR Report 2002. The report outlines how we performed in our work to invest in our employees, promote equality and diversity, play an active role in the community, combat financial exclusion and manage our environmental impact.

<http://www.personal.barclays.co.uk/BRC1/jsp/brcontrol?task=articleabout&site=pfs&value=2950&menu=2736>

Triodos Bank (Netherlands)

Triodos Bank is one of Europe's leading ethical banks, offering a range of simple, targeted and regular savings accounts that support innovative businesses and organizations.

<http://www.triodos.nl/>

Human Rights/Workplace

Adidas – Salomon

They strive to be the global leader in the sporting goods industry with sports brands built on a passion for competition and a sporting lifestyle. Their strategy is simple: continuously strengthen their brands and products to improve their competitive position and financial performance. To see how they achieve their goals they invite you to surf their site.

<http://www.adidas-salomon.com/en/overview/welcome.asp>

British Telecom (UK)

Working closely with their multi site corporate customers, BT's goal is to deliver inspirational results, which fulfill their business needs and tap into their untapped potential.

They are in business to earn the status of being "partner of choice" for creative, valued and reliable communications services and solutions.

<http://www.btglobalservices.com/en/>

CISCO

Cisco Systems, Inc. is the worldwide leader in networking for the Internet. Cisco's Internet Protocol-based (IP) networking solutions are the foundation of the Internet and most corporate, education, and government networks around the world. Cisco provides the broadest line of solutions for transporting data, voice and video within buildings, across campuses, or around the world.

www.cisco.com

Merck

At Merck, our primary task is to discover, develop and deliver breakthrough medicines and vaccines to people around the world. However, our mission also entails something more — not only are we committed to the health, safety and well-being of the people who take our medicines, but also to our employees, neighbors and others in the global communities where we live and work. We cannot succeed as a business unless we live up to this commitment.

<http://www.merck.com/about/cr/>

The Container Store

In 1978, co-founders Kip Tindell (CEO and president) and Garrett Boone (Chairman) decided to open a store devoted to helping people streamline and simplify their lives by offering an exceptional mix of storage and organization products. As the two embarked on a quest to launch this new retail concept, the first challenge was to find products to sell. They often had to persuade commercially oriented manufacturers to supply them with retail products. And those commercial products were precisely in line with Kip and Garrett's original concept - to sell multifunctional products that would save customers space, and ultimately, save them time.

www.containerstore.com

S.C. Johnson

You know their products — Shout®, Windex®, Mr. Muscle®, Ziploc®, Edge®, Glade®, Brise®, Vanish®, Raid®, OFF!®, Kabbikiller®, Pledge®, Scrubbing Bubbles® — you use them all the time.

SC Johnson has been making great products like these for more than a hundred years, and the same family that started the company still owns and runs it today. For over a century, spanning five generations, the Johnson family has demanded the best for families everywhere.

- Innovative products that make life a little easier and homes cleaner, safer and healthier.
- Cutting edge employment programs and policies that raised workplace standards for all employers.
- Unparalleled environmental and community leadership that is a recognized model of commitment-in-action for a better world for everyone.

<http://www.scjohnson.com/>

Grundfos

Mission:

Grundfos is one of the world's leading pump manufacturers.

It is their mission - the basis of their existence - to successfully develop, produce and sell high-quality pumps and pumping systems world-wide, contributing to a better quality of life and a healthy environment.

Vision:

Their vision - the future they are striving for - is that:

- Their customers acknowledge them as the leading producer and partner when it comes to high quality pumps – both in terms of performance and the environment.
- Their employees thrive and demonstrate their satisfaction because their jobs and working conditions provide them with great opportunities for professional and personal growth and development. In addition, their satisfaction stems from a good work environment that takes the individual's wishes and qualifications into consideration.
- The rest of society recognizes and regards Grundfos with respect as a result of their responsible conduct in relation to the laws of their society, the principles of democracy, local traditions and the environment – as well as their relations to the people whose lives and circumstances they touch.

<http://www.grundfos.com/web/grfosweb.nsf>

General Motors

Profile:

General Motors Corp. (NYSE: GM), the world's largest vehicle manufacturer, employs 341,000 people globally in its core automotive business and subsidiaries. Founded in 1908, GM has been the global automotive sales leader since 1931. GM today has manufacturing operations in 32 countries and its vehicles are sold in more than 190 countries. In 2002, GM sold more than 8.6 million cars and trucks, nearly 15 percent of the global vehicle market. GM's global headquarters is at the GM Renaissance Center in Detroit.

http://www.gm.com/flash_homepage/

SAS Institute

At SAS, their mission is to deliver superior software and services that give people the power to make the right decisions. They want to be the most valued competitive weapon in business decision-making.

<http://www.sas.com/>

Empresa Agroindustrial Laredo (Peru)

Laredo is located in the North Western region of Peru, the Moche River Valley. Laredo owns 3,510 hectares planted in sugar cane and it buys cane from 2,900 producers. It produced 1,489,952 quintals of sugar. Both figures marked a record under Laredo's historical background. With respect to the analyzed year, the IFC-FMO financing, and the resources from the sugar company's own operations, Laredo again improved its efficiency and operative indexes.

<http://www.manuelita.com/>

Environment

Fetzer Vineyard

They are an environmentally and socially conscious grower, producer and marketer of wines of the highest quality and value.

Working in harmony and with respect for the human spirit, they are committed to sharing information about the enjoyment of food and wine in a lifestyle of moderation and responsibility.

They are dedicated to the continuous growth and development of their people and their business.

<http://www.fetzer.com/>

IKEA

The IKEA business idea is to offer a wide range of home furnishings with good design and function at prices so low that as many people as possible will be able to afford them. And still have money left!

<http://www.ikea.co.uk/>

Nortel Networks

Nortel Networks mission is being a company that's valued by its customers, shareholders, employees, and the communities in which their people live, work, and raise their families.

www.nortelnetworks.com

UPS

Over the course of its history, UPS has become an expert in global distribution. At UPS, global distribution involves managing not only the movement of goods, but also the flow of information and finance that moves with the goods.

UPS customers increasingly asked to tap into this expertise, which ultimately lead to the formation of UPS Supply Chain Solutions. UPS Supply Chain Solutions is a streamlined organization that provides logistics, global freight, financial services, mail services, and consulting to enhance customers' business performance and improve their global supply chains.

UPS Supply Chain Solutions are delivered by UPS Capital, UPS Logistics Group, UPS Freight Services, UPS Mail Innovations and UPS Consulting.

<http://www.ups.com/>

LaConstancia (El Salvador)

Mission:

Their aim is continuously identify and satisfy their internal and external customers' needs and expectations, with products and services that are of value to them. To achieve this, they encourage teamwork and individual involvement, providing the necessary means and environment for the continuous and systematic improvement of their people, organization, processes, systems, technology and equipment, as well as those of their suppliers. Their business activities must lead to community development and benefit their investors and those who work at Smurfit Cartón de Colombia. They always operate to the highest ethical standards.

<http://www.laconstancia.com/>

Smurfit Carton de Colombia (Columbia)

Mission:

Their aim is to continuously identify and satisfy their internal and external customers' needs and expectations, with products and services that are of value to them. To achieve this, they encourage teamwork and individual involvement, providing the necessary means and environment for the continuous and systematic improvement of their people, organization, processes, systems, technology and equipment, as well as those of their suppliers.

Their business activities must lead to community development and benefit their investors and those who work at Smurfit Cartón de Colombia. They always operate to the highest ethical standards.

<http://www.smurfit.com.co/>

Makaibari (India)

Cradled in the lap of the Himalayas, the mystical land of the ancient seers and saints, where the Vedas were created, Makaibari (literally "Maize Land") is in Kurseong, the Land of the White Orchid, in Darjeeling. In 1859, this magical land saw the development of the now fabled tea estate. It went on to become the best tea garden in the world. But not just that....

www.makaibari.com

Intercell (Poland)

Mission:

To be the leader on the market of paper packaging in Poland:

- Friendly to environment
- Supporting Customers in their strive to success

- Meeting the shareholders expectations by increasing the company value

Vision:

- To be the leading producer of the ecological packaging in the Eastern and Middle Europe
- To be the leader in progress of the sector
- To reached the market success through developing the contact with the Customer and ensuring the best standards of service
- To develop paper production in line with the trends of the market of packaging
- To be considered as the company friendly to people and environment
- To possess their, dynamic and profitable recycling organization

www.intercell.pl/ang/ofirmie.html

Conservation Corporation Africa (S. Africa)

In our vision for Africa, we promote the belief that the wisest use of our wild places is through the development of multi-use tourism, for the benefit not only of travellers, but also for the rural communities who live among our enormously rich wildlife heritage. With the establishment of CC Africa's first reserves, such as Londolozi Private Game Reserve and Phinda Private Game Reserve, both in South Africa, we have created role models for the rest of Africa. In these reserves, the potential of transfrontier parks may be witnessed in microcosm.

<http://www.ccafrica.com/>

Perion (Hungary)

Perion is a medium-sized company operating in Hungary, which has been producing chemical batteries since 1893. The company became owned by employees and management after the change from a socialist to a free market economy in 1989, following a dramatic reduction of the number of employees. Environmental problems resulting from untreated hazardous waste, waste water discharges and gaseous emissions were becoming serious, and the company was subject to increasing environmental fines. Market competition also motivated the company to implement environmental management. Perion has started to manage health, safety and environmental issues in an integrated way. Hazardous waste reserves have been eliminated, a patented technology has been developed to recycle manufacturing waste, and a complex waste minimisation programme has been implemented to tackle waste water problems. Emissions have been reduced below the legal limits with the help of modern filters and pollution prevention measures. Perion now has the opportunity of dealing with a significant portion of used car-battery recycling in Hungary, and plans to build a new plant and utilise its patented technological process, to exploit this opportunity.

http://www.inem.org/htdocs/case_studies/perion.html

Tecon Salvador (Brazil)

Wilson, Sons group began operations at this terminal in March 2000, with the main objectives of a steady increase in capacity and productivity and a gradual reduction of costs. Our work is based on our client's prospects and requirements and transparency in operations and prices.

Investments in the order of US\$21 million have already been applied in new equipment for the terminal -2 portainers, new forklifts, tractors and trailers - and in civil works - surfacing of the yard area, building of an administration block, a 4,000m² warehouse, entrance and exit gates and quay reinforcement. The Tecon Salvador has two berths of 240m and 214m, and a total area of 74,000m².

Strategically located in one of the most important Brazilian ports, the goal of Tecon Salvador is to extend its activities as a port terminal to become a major logistic service provider, offering customized and integrated services that completely supply its clients demands with total efficiency.

http://www.wilsonsons.com.br/ingles/operacoes_portuarias/tecon_sal.asp

Printech (Ireland)

Printech International is a 360-employee printer, located in Dublin. It supplies multinational computer companies with computer manuals, and has also moved into the area of software-kitting. Printech developed a formal environmental management system mainly as a result of supply-chain pressure, and legislative pressure. The company, which is one of the first print and packaging companies in Western Europe to be certified to ISO 9002, perceived an overlap between quality, health and safety and environmental issues. An environmental committee was set up in 1993. Following on from this an environmental effects register, which formed the first part of Printech's environmental management system procedural structure, was established. The company developed this system to cover all areas of operations. In 1994 it was accredited to BS 7750 and in 1996 was certified to ISO 14001. Printech now has a system of emission control which ensures that its emissions are below the levels set by legislation. Energy costs have been reduced as a direct result of environmental management, and chemicals can now be recycled on-site. The company intends to continue improving its environmental performance, and to use this as a competitive market advantage.

http://www.inem.org/htdocs/case_studies/printech.html

Sustainable Development

AB Electrolux (Sweden)

Mission:

The Electrolux mission is to be the world leader in profitably marketing innovative

product and service solutions to real problems, thereby making the personal and professional lives of their customers easier and more enjoyable.

This they will achieve through

- a commitment to driving performance throughout the entire organization
- a commitment to innovation and marketing – to products and brands
- a commitment to superior talent management
- a commitment to the Electrolux way of doing things

<http://www.electrolux.com/>

Design Tex

Over the years the company has progressed from its origin as a drapery supplier to become the world's leading supplier of applied soft surfaces for commercial interiors. They are proud of their accomplishments and remain committed to being the very best. They extend an open invitation to visit them in New York or any of their 20 global locations.

At DesignTex, quality, durability and design integrity remain their top priorities. 80 awards from the ASID, IIDA, and IFMA underscore design leadership. Long-term livability and end-use satisfaction in textiles that support the intent of the total design concept back this aesthetic excellence.

<http://www.dtex.com/>

Interface, Inc.

Vision:

To be the first company that, by its deeds, shows the entire industrial world what sustainability is in all its dimensions: People, process, product, place and profits — by 2020 — and in doing so they will become restorative through the power of influence.

Mission:

"Interface will become the first name in commercial and institutional interiors worldwide through its commitment to people, process, product, place and profits. They will strive to create an organization wherein all people are accorded unconditional respect and dignity; one that allows each person to continuously learn and develop. They will focus on product (which includes service) through constant emphasis on process quality and engineering, which they will combine with careful attention to their customers' needs so as always to deliver superior value to their customers, thereby maximizing all stakeholders' satisfaction. They will honor the places where they do business by endeavoring to become the first name in industrial ecology, a corporation that cherishes nature and restores the environment. Interface will lead by example and validate by results, including profits, leaving the world a better place than when they began, and they will be restorative through the power of their influence in the world."

www.interfaceinc.com/flash/flash_C.html

S.C. Johnson & Sons

You know their products — Shout®, Windex®, Mr. Muscle®, Ziploc®, Edge®, Glade®, Brise®, Vanish®, Raid®, OFF!®, Kabbikiller®, Pledge®, Scrubbing Bubbles® — you use them all the time.

SC Johnson has been making great products like these for more than a hundred years, and the same family that started the company still owns and runs it today. For over a century, spanning five generations, the Johnson family has demanded the best for families everywhere.

- Innovative products that make life a little easier and homes cleaner, safer and healthier.
- Cutting edge employment programs and policies that raised workplace standards for all employers.
- Unparalleled environmental and community leadership that is a recognized model of commitment-in-action for a better world for everyone.

<http://www.scjohnson.com/>

Stonyfield Farm

- To provide the very highest quality; best-tasting all natural and Certified Organic products
- To educate consumers and producers about the value of protecting the environment and of supporting family farmers and sustainable farming methods.
- To serve as a model that environmentally and socially responsible businesses can also be profitable.
- To provide a healthful, productive and enjoyable work place for all employees, with opportunities to gain new skills and advance personal career goals.
- To recognize their obligations to stockholders and lenders by providing an excellent return on their investment.

<http://www.stoneyfieldfarms.com/>

Novo Nordisk

Novo Nordisk is a focused healthcare company. With the broadest diabetes product portfolio in the industry, including the most advanced products within the area of insulin delivery systems, Novo Nordisk is a world leader in diabetes care. In addition, Novo Nordisk has a leading position in areas such as haemostasis management, growth hormone therapy and hormone replacement therapy. Novo Nordisk manufactures and markets pharmaceutical products and services that make a significant difference to patients, the medical profession and society.

Social Responsibility

Social responsibility for Novo Nordisk is about caring for people. This applies to our employees and the people whose healthcare needs we serve. It also considers the impact of our business on the global society and the local community. As such, social responsibility is more than a virtue – it is a business imperative. It is an investment in our future.

Sustainability

Increasingly, sustainability is perceived by international business leaders as having more to do with opportunities than with avoiding costs, managing risks and compliance. Innovation and long-term profitability are the opportunities associated with the Triple Bottom Line approach Novo Nordisk has been pursuing for more than a decade.

http://www.novonordisk.com/sustainability/soc_responsibility/default.asp

DuPont

To thrive, healthy businesses need healthy communities. DuPont improves the quality of life and enhances the vitality of the communities in which we operate by supporting community sustainability efforts. Sustainable communities recognize the interdependence of social progress, economic success and environmental excellence. Through financial contributions and the active volunteer participation of employees, DuPont provides support to programs and non-profit organizations that address one or more components of community sustainability.

http://www1.dupont.com/NASApp/dupontglobal/corp/index.jsp?page=/content/US/en_US/social/index.html

Beximco (Bangladesh)

Beximco Group is the largest private sector industrial conglomerate in Bangladesh. It has a turnover of Tk 16.5 billion and employs 22,000 people. Beximco has 152,000 shareholders and contributes to 8% of the market capitalization of Dhaka Stock Exchange.

<http://www.beximco.org/home/home.asp>

Helados Bon (Dominican Republic)

Mission:

To be the leader in offering food products, franchises and services of world-class quality, while ensuring profitability, with the participation of their collaborators and clients, setting an example for national pride.

Vision:

To make the Dominican family happy offering food products meeting top standards for quality, price and service, first in national markets and later while projecting ourselves into the global marketplace.

www.heladosbon.com/index.htm

Kunda Nordic Cement (Estonia)

From 1993 to 2000 cement manufacturing in Kunda underwent thorough renovation. One of the most essential goals was to eliminate dust pollution from clinker kiln and cement mills. To achieve this objective filters required to clean the exhaust were installed.

Another important part of the company's restoration was building of a deep-water port at Kunda on the coast of the Gulf of Finland. In 1999 the company completed assembly of a local electricity and heat production station operating on natural gas.

www.knc.ee/index.php?lang=eng

Kurzemes Piens (Latvia)

The Joint Stock Company "Kurzemes Piens" is a regional dairy with five plants located in the Liepaja region in Latvia. The dairy's main products are milk, yogurt, cottage cheese, kefir, sour cream, and butter. The plant processes about 100 metric tons of milk per day. The main dairy unit, located in the city of Liepaja, employed 54 people in 1994.

The cleaner production measures were initiated under **World Environment Center's (WEC's)** Industrial Waste Minimization Program in the Baltic countries.

<http://www.p2pays.org/ref/10/09320.htm>

Hindustan Lever (India)

Our vision is to continue to be an environmentally responsible organisation making continuous improvements in the management of the environmental impact of our operations.

We will achieve this through an Integrated Environment Management approach, which focuses on People, Technology and Facilities, supported by Management Commitment as the prime driver.

http://www.hll.com/HLL/knowus/corp_environmental.html

Mozal (Mozambique)

Mozal is committed to continual improvement in all aspects of performance and aspires to zero harm to people and the environment. Through implementation of our policy, Mozal seeks to achieve the following objectives.

- To minimise the risk of personal injury at work
- To promote the health and well-being of all employees
- To impact positively on the surrounding community
- To mitigate any negative impact of environmental emissions
- To minimise waste generation and optimise recycling opportunities
- To pursue the efficient use of natural resources

<http://www.mozal.com/>

Accountability

British Telecom (UK)

BT is the global services provider that helps multi-site organizations master the complexity of business communication. Because of their expertise, partnerships and experience, a completeness of a range of services linked to a global Business IP network and a culturally attuned human network of professionals, they can deliver for you the promise of integrated communications and IT in a connected world.

<http://www.btglobalservices.com/en/>

Ford Motor Co.

Vision:

To become the world's leading Consumer Company for automotive products and services.

Mission:

They are a global family with a proud heritage passionately committed to providing personal mobility for people around the world.

They anticipate consumer need and deliver outstanding products and services that improve people's lives.

<http://www.ford.com/en/default.htm>

Mountain Equipment Cooperative (Canada)

Purpose:

To support people in achieving the benefit of wilderness-oriented recreation.

Vision:

Mountain Equipment Co-op is an innovative, thriving co-operative that inspires excellence in products and services, passion for wilderness experiences, leadership for a just world, and action for a healthy planet.

Mission:

Mountain Equipment Co-op provides quality products and services for self-propelled wilderness-oriented recreation, such as hiking and mountaineering, at the lowest reasonable price in an informative, respectful manner. They are a member-owned co-operative striving for social and environmental leadership.

<http://www.mec.ca/Main/home.jsp>

Banco Cuscatlan (El Salvador)

Our support for coming generations is manifested by the different activities and organizations that we support.

http://www.bancocuscatlan.com/elsalvador/f_acercaCuscatlan/index.html

*Philanthropy***American Express**

American Express has a long history of being good citizens in the communities in which we live and work. We believe that the company should contribute to the larger society in which it operates and enhance the climate in which we do business.

One manifestation of the company's concern for good citizenship is the philanthropic contributions we make around the world, some of which are highlighted on the pages of this report. Not only is it appropriate for the company to give back to the communities in which it operates, it is also smart business. Healthy communities are important to the well-being of society and the overall economy. They also provide an environment that helps companies such as American Express grow, innovate and attract outstanding talent.

<http://home3.americanexpress.com/corp/philanthropy/fdnbro.asp>

Grand Circle Travel

Grand Circle Travel is a member of the Grand Circle Corporation, a family-owned company that includes Overseas Adventure Travel and Vermont Bicycle Tours. With 41 offices around the world, and 2,000 dedicated associates working around the clock, to ensure that you have nothing less than an excellent vacation, it's little wonder that they are the leader in international travel and discovery for Americans. From Boston to Bangkok, London to Lima, Sydney to Xian, their travel planners, airport representatives,

Program Directors, and others monitor your trip every step of the way. No matter where in the world you travel with them, they're always close by!

<http://www.gct.com/gct/general/>

Intel

For more than three decades, Intel Corporation has developed technology enabling the computer and Internet revolution that has changed the world. Founded in 1968 to build semiconductor memory products, Intel introduced the world's first microprocessor in 1971. Today, Intel supplies the computing and communications industries with chips, boards, systems, and software building blocks that are the "ingredients" of computers, servers and networking and communications products. These products are used by industry members to create advanced computing and communications systems. Intel's mission is to be the preeminent building block supplier to the Internet economy.

<http://www.intel.com/>

Quaker Oats

You know them by their brands, which have been around for as long as a century. Trusted names like Quaker®, and Gatorade® are symbols of quality, great taste, and nutrition. Holding No.1 positions in their respective categories are favorites such as Gatorade Thirst Quencher, Quaker Oats, Quaker Rice Cakes, Chewy Granola Bars and Rice-A-Roni®. With its Aunt Jemima® brand, Quaker Foods & Beverages is also a leading manufacturer of pancake syrups and mixes. It is among the four largest manufacturers of cold cereals with popular brands like Cap'n Crunch® and Life®.

<http://www.quakeroats.com/>

Glaxo Smith Kline

GlaxoSmithKline (GSK) is a world leading research-based pharmaceutical company with a powerful combination of skills and resources that provides a platform for delivering strong growth in today's rapidly changing healthcare environment.

GSK's mission is to improve the quality of human life by enabling people to do more, feel better and live longer.

<http://www.gsk.com/index.htm>

Fleet Boston Financial

FleetBoston Financial is the seventh-largest financial holding company in the United States, with assets of \$191 billion. The company's principal businesses, Personal Financial Services and Wholesale Banking, offer a comprehensive array of innovative

financial solutions to 20 million customers. Through its Personal Financial Services franchise, Fleet offers retail banking, wealth management and investment services, nationwide brokerage, credit card and consumer lending services. These services are available through approximately 1,500 branches and more than 3,500 ATMs in the Northeast; through Fleet HomeLink, one of the nation's leading online banking platforms, and through telephone banking. Fleet's Wholesale Banking division offers commercial banking, commercial finance, capital markets, and global processing services. FleetBoston Financial is headquartered in Boston and listed on the New York Stock Exchange (NYSE: FBF) and the Boston Stock Exchange (BSE: FBF).

<http://www.fleetcards.com/>

Community Development

Timberland

Here at Timberland, things are different from other companies. At their corporate headquarters, employees work hard to make some of the world's most innovative products, then use paid time-off to make a difference in the community. Children play in their in-house day care center. The committed young people of City Year New Hampshire, a national youth corps that recently set up shop within Timberland's walls, are hard at work. And throughout the entire company, it's evident that doing well and doing good are inextricably linked.

http://www.timberland.com/cgi-bin/timberland/timberland/tim_homepage.jsp?sourceid=00397091468312079781&bfinfo=00013f83713bsm3

Cessna Aircraft

From the assembly line to the flight line, Cessna values the thinking that makes great products even better. Whether it's the first cantilever wing, the fastest business jet in the world, or everything in between, they deliver the fruits of those great ideas – including the latest in avionics, efficient, high-performing engines, and reliable, mission-oriented airframes.

<http://cessna.com/>

Nissan Motor Corp. USA/Los Angeles Urban League

Nissan:

Nissan is made up of a richly diverse group of people, as reflected in the company's leadership team and the numerous corporate outreach programs in which they participate in the community. If number-crunching is what you need, they've got that kind of behind-the-scenes information, too. Together, they have what it takes to build cars and trucks with the power to change both the way you view the world and the way you move in it.

LAUL:**Mission:**

The mission of the Los Angeles Urban League is to enable African Americans and other minorities to secure economic self-reliance, parity, power and civil rights through advocacy activities and the provision of programs and services in their uniquely diversified city and region.

www.nissanusa.com

www.laul.org

Delphi Automotive (Mexico)**Vision:**

“Be recognized by their customers as their best supplier”

Mission:

- Global automotive system supplier with component excellence.
- Passionate pursuit of customer satisfaction through technology, quality, cost, responsiveness and attitude.
- Grow revenue across a diversified customer base.
- Increase stakeholder value through revenue growth and superior

www.maquilaportal.com/Profile/Delphi/ingprincipal.htm

Universal Studios

For more than 85 years, Universal Studios has been bringing unique entertainment experiences to millions of people around the world. They do this through their motion pictures and home videos, theme parks and attractions, television networks and programming, and much more. They are in the business of thrills and chills as well as tears and laughter -- of inspiring wonder and ultimately transforming moments into lasting memories.

Universal Studios has broadened its reach as one of the leading entertainment companies in the world. The Universal global brand has come to stand for the finest in exciting, exhilarating entertainment.

<http://www.universalstudios.com/homepage/flash/>

Wild Oats Markets**Mission:**

Wild Oats was founded on the vision of enhancing the lives of their Customers and their people with products and education that support health and well-being.

Wild Oats is committed to providing the highest quality, fresh and natural food, health and wellness products in vibrant stores with people who are friendly, eager and ready to educate.

At Wild Oats, they sell food that remembers its roots.TM

Their Values

Service: Their customers always come first.

People: They behave with integrity, respect, honesty, and are committed to each other's success.

Quality: Their products are the best balance of quality and value in the marketplace.

Local and Global Communities: They give back to their communities and reduce their negative impact on the environment.

Stakeholders: They are committed to increasing long-term stakeholder value.

Accountability: They hold themselves accountable to their mission and values.

http://www.wildoats.com/app/cda/oat_cda.html?pt=Home

Washington Mutual

Mission:

To be one of the nation's premier financial services companies by:

- Providing exceptional service to customers
- Making communities better places to live and work
- Recognizing outstanding efforts of employees
- Delivering a superior long-term return to shareholders

www.washingtonmutual.com

State Farm Insurance

State Farm's mission is to help people manage the risks of everyday life, recover from the unexpected and realize their dreams.

Their vision for the future is to be the customer's first and best choice in the products and services they provide. They will continue to be the leader in the insurance industry and they will become a leader in the financial services arena. Their customers' needs will determine their path. Their values will guide them.

<http://www.statefarm.com/>

Cemex (Mexico)

As a leading producer and marketer of cement and ready-mix concrete, they are helping their clients build their future, providing them with the best cement products and building solutions services in the industry. They operate in the most dynamic international markets across four continents and employ over 25,500 people with an unwavering commitment to customer satisfaction, employee well-being, community outreach, environmental stewardship and shareholder value creation.

www.cemex.com

JP Morgan Chase

Mission:

To create exceptional value for their clients, employees and investors by delivering their deep, broad and integrated capabilities.

<http://www.jpmorganchase.com/>

Impact Community Capital (Insurance Company Investments)

Mission:

"[The] mission at Impact Community Capital is to provide a voluntary bridge between the need for investment capital to bolster California's low-income communities and the needs of insurance companies to invest their policyholders' money in prudent and productive ways. It's a wonderful role because they are able to engage in good business practices while doing good for California communities. Impact exists because several major insurance companies saw the need and the benefits of investing wisely in low-income communities and made a major commitment to see that the job was done effectively. They hope you find the information on these pages helpful and informative. They at Impact are excited about what they've been able to accomplish and about the opportunities they see to make a significant contribution to [their] state's economic health and vitality."

www.impactcapital.net

Bank of America

"The reason Bank of America is in business is to help make communities stronger and to help people achieve their dreams. [They] fulfill this purpose by reaching for higher standards in everything [they] do – for [their] customers, [their] shareholder; [their] associates, [their] communities upon which the future prosperity of their company rests."

www.bankofamerica.com

Social Enterprise

General Overview (Nonprofit & for profit)

Information Resources (Books, Articles, Websites)

“Blurring Sector Boundaries: Serving Social Purpose Through For-Profit Structures” by G. Dees & B. Anderson

Abstract:

Traditional sector boundaries are breaking down as societies search for more innovative, cost-effective, and sustainable ways to solve social problems and provide socially important goods, such as education and health care. One result has been a rise in the number of social entrepreneurs who want to combine a social purpose with a for-profit organizational structure. Is the wealth-creation imperative inherent in for-profit organizations really compatible with optimal social impact? This paper is designed to help would-be for-profit social entrepreneurs understand and address the challenges of using a for-profit organization to serve a social objective. Drawing on a wide range of literature as well as case studies, we identify the challenges facing for-profit social ventures and outline strategies for responding. Of course, there are limits to what can be done within a for-profit structure. Our analysis should help social entrepreneurs recognize those limits and respond to them intelligently as they design their organizations.

<http://faculty.fuqua.duke.edu/centers/case/research3.htm>

“Philanthropic Academic Centers in the US” by E. Schmidt

Schmidt, Elizabeth “Philanthropic Academic Centers in the United States,” Report to the Institute for Philanthropy, November 6, 2002.

<http://www.instituteforphilanthropy.org.uk/about.html>

“Social Impact Management & Social Enterprise” by M. Gentile (Aspen Instit.)

“Social Impact Management and Social Enterprise: Two Sides of the Same Coin or Totally Different Currency?”

As attention to these interrelated topics grows in business schools, this paper examines how curricular, research and institutional initiatives in each area can reinforce initiatives in the other.

<http://www.aspeninstitute.org/Programt2.asp?bid=2194>

Social Enterprise Directory (Social Enterprise Alliance & CWV)

Community Wealth Ventures and Social Enterprise Alliance have assembled a directory of nonprofit organizations with business ventures and strategic alliances as a reference tool to help build a broad network of social enterprise practitioners around the country. Please feel free to search the database for information that is useful to your needs,

whether you are a nonprofit entrepreneur, foundation, consumer, donor, or other interested party. For the purposes of this directory, we define business ventures and strategic alliances as follows:

- *Business Venture*: A business with revenues generated from the sale of products and/or services to customers beyond the organization's immediate constituents.
- *Strategic Alliance*: A partnership between a company and a nonprofit with a mutually beneficial outcome. For example, a company might partner with a nonprofit to market an image, product, or service. The nonprofit may benefit from revenues or in-kind donations that fund its cause or programs.

<http://63.124.148.154/>

Social Enterprise Resource Collection by Dewey & Kaye, Inc.

This resource collection is intended to serve as a practical guide to the social enterprise movement, by use by current or aspiring social entrepreneurs and by those who invest in their efforts.

www.dkiinc.com/pub.html

Net-Impact Website

Net Impact is a network of emerging business leaders committed to using the power of business to create a better world. It is also the most progressive and influential network of MBAs in existence today. Originally founded as Students for Responsible Business in 1993, Net Impact has developed from a great idea shared by a few business students into a mission-driven network of 7,000 new leaders for better business. Through their central office and 80 student and professional chapters worldwide, they offer a portfolio of programs to help members broaden their business education, refine their leadership skills, and pursue their professional goals, while building their network.

www.net-impact.org

“The Social Entrepreneur: They LOOK, THINK AND ACT like entrepreneurs, But they’re going where entrepreneurs have never gone before” by H. McLeod (Inc. Magazine, May 1997)

<http://www.inc.com/magazine/19970515/1497.html>

“Managing the Double Bottom Line” by K. Alter

Alter, Sutia K. Managing the Double Bottom Line. Pact Publications, 2001. 148.

This workbook is intended to complement the book "Managing the Double Bottom Line: A Business Planning Guide for Social Enterprises" by facilitating social enterprise business planning. The author guides the reader through preparing plans for the business, marketing, operations/production, human resources, finances, and evaluation. Each chapter provides charts, worksheets, tools, guidelines, templates, and examples to engage the reader in an active and comprehensive manner. "Upon completion of the "Workbook," users will have a well-constructed, logical business plan for their social enterprise ready for submission to donors and investors, or for internal purposes as a management guide."

http://www.pactpub.com/item.asp?prod_cd=PAC075

“New Social Entrepreneurs” and Box Set by REDF

Box Set:

The Roberts Enterprise Development Fund and its Portfolio members produced this three-volume set to answer three questions. First, practitioners within social purpose enterprises were asked: If you were starting out again, what would you be interested in learning about and what do you wish you had known? (Volume 1: Practitioner Perspectives) Then, REDF staff and partners provided candid answers to the question: What is REDF's approach to venture philanthropy? (Volume 2: Investor Perspectives) Lastly, Teresa Moore tackled the critical question: Who is the successful social entrepreneur?

New Social Entrepreneurs:

The Roberts Enterprise Development Fund produced *New Social Entrepreneurs: The Success, Challenge, and Lessons of Non-Profit Enterprise Creation* in 1996. The book was written to provide an up-to-date report to the growing number of people interested in nonprofit business development. Not intended as a definitive statement, but as a "report from the trenches" it is offered in contribution to what has fast become a major national dialogue.

http://www.redf.org/pub_boxset.htm
www.redf.org/pub_nse.htm

“Selling Social Change without Selling Out” book by Andy Robinson

Robinson, Andy. Selling Social Change without Selling Out. 1st ed. Jossey-Bass, 2003.

Book Description:

In *Selling Social Change (Without Selling Out)* expert fundraising trainer and consultant Andy Robinson shows nonprofit professionals how to initiate and sustain successful

earned income ventures that provide financial security and advance an organization's mission. Step by step, this invaluable resource shows how to organize a team, select a venture, draft a business plan, find start-up funding, and successfully market goods and services. Robinson includes critical information on the tax implications of earned income and the pros and cons of corporate partnerships. The book also addresses when to consider outsourcing, collaborating with competitors, and raising additional funds to expand the business.

<http://www.amazon.com/exec/obidos/ASIN/0787962163/inktomi-bkasin-20/103-0341049-2699026>

“Venture Forth” book by Larson

Larson, Rolfe. Venture Forth. Amherst H. Wilder Foundation, 2002. 1-272.

This is the most complete step-by-step guide on nonprofit business ventures. Building on the experience of dozens of organizations, this handbook gives you a time-tested approach for finding, testing, and launching a successful nonprofit business venture.

http://www.wilder.org/pubs/venture_forth/

Social Enterprise Magazine (UK)

Social Enterprise is published by Make A Difference Publishing Ltd, a joint venture between New Start Publishing Ltd - publishers of the regeneration magazine New Start - and CAN (Community Action Network), the national network of social entrepreneurs.

<http://www.socialenterprisemag.co.uk/>

Origo Fourth Sector News

Origo Fourth Sector News is a weekly digest developed and distributed by Origo Inc. in collaboration with the Fourth Sector Network, that provides brief overviews and links to a wide range of news items relating to the nonprofit sector, including information on philanthropic trends, social entrepreneurship, and organizational capacity.

<http://www.origoinc.com>

<http://www.venturephilanthropypartners.org/learning/resources/newsletters.html>

“How to Change the World: Social Entrepreneurs and the Power of New Ideas” by D. Bornstein

What business entrepreneurs are to the economy, social entrepreneurs are to social change. They are, writes David Bornstein, the driven, creative individuals who question the status quo, exploit new opportunities, refuse to give up--and remake the world for the better. How to Change the World tells the fascinating stories of these remarkable

individuals--many in the United States, others in countries from Brazil to Hungary--providing an In Search of Excellence for the nonprofit sector.

<http://www.amazon.com/exec/obidos/ASIN/0195138058/inktomi-bkasin-20/ref%3Dnosim/102-6711886-8853762>

“Going to Scale” by J. Bradach

Bradach, Jeffrey “Going to Scale: The Challenge of Replicating Social Programs,” *Stanford Social Innovation Review*, Spring 2003.

http://www.gsb.stanford.edu/ssir/_private/Spring2003Articles/BRADACH.pdf

“Social Enterprise: A Typology of the Field Contextualized in Latin America” by K. Alter

Alter, Kim “Social Enterprise: A Typology of the Field Contextualized in Latin America,” publication for the Inter-American Development Bank. Paper to be released in October of 2003.

<http://www.virtueventures.com>

Social Edge Website

Social Edge is the provocative online community for social entrepreneurs, philanthropists, nonprofit professionals, and other members of the social sector to network, learn, debate, inspire, and share expertise and resources. The site is an open platform for virtual discussion and debate, owned and shaped by its members.

<http://www.skollfoundation.org/socialedge/index.asp>

Incubators/Support to Social Entrepreneurs

ASHOKA

Mission:

Ashoka's mission is to develop the profession of [social entrepreneurship](#) around the world. Ashoka invests in people. It is a global non-profit organization that searches the world for social entrepreneurs—extraordinary individuals with unprecedented ideas for change in their communities. Ashoka identifies and invests in these social entrepreneurs when no one else will.

www.ashoka.org/

The Denali Initiative

Mission:

Initiative's mission is to improve the quality of life in their communities and promote a standard of excellence in the social sector by: Identifying leaders with demonstrated entrepreneurial potential and high ethical standards. Accelerating and maximizing the effectiveness of these leaders through a rigorous social enterprise development program.

<http://www.denaliinitiative.org/>

Echoing Green

Echoing Green was founded over a decade ago by the leadership of General Atlantic Partners (GAP), a top New York-based global private equity firm. As one of the leading social venture funds, Echoing Green has emerged as a premiere organization that seeds new ideas to solve intractable social problems and launches social entrepreneurs around the world to combat them. Echoing Green has received long-term support from their corporate partner, GAP, and their philanthropic partner, Atlantic Philanthropies, Inc. (APS).

<http://www.echoinggreen.org/>

Creative Capital

Creative Capital, a New York City-based nonprofit organization, acts as a catalyst for the development of adventurous and imaginative ideas by supporting artists who pursue innovation in form and/or content in the performing and visual arts, film and video, and in emerging fields. They are committed to working in partnership with the artists whom they fund, providing advisory services and professional development assistance along with multi-faceted financial aid and promotional support throughout the life of each Creative Capital project.

<http://www.creative-capital.org/>

UnLtd (UK)

UnLtd is a consortium of charities, including [Community Action Network](#) and the [School for Social Entrepreneurs](#). From 2nd December 2002, UnLtd will be offering grants from an endowment fund to would-be social entrepreneurs. Two forms of grant will be available. Level 1 grants of between £500 and £5000 will be made for start-up organisations involved in community benefit, and level 2 grants of between £5000 and £15000 will be available to develop existing projects.

<http://www.unltd.org.uk/home.php>

Endeavor Global Initiatives

Endeavor Global, Inc. is a non-profit organization pioneering a new approach to international development. Founded in 1997, Endeavor's mission is to be the leading non-profit supporter of entrepreneurship in emerging markets.

<http://www.endeavor.org/>

Schwab Foundation for Social Entrepreneurship (Switzerland)

Mission:

The Schwab Foundation provides a global platform to promote social entrepreneurship as a key element to advance societies and address social problems in an innovative and effective manner.

[**http://www.schwabfound.org/history.htm**](http://www.schwabfound.org/history.htm)

Wildlife Conservation Network

Mission:

Wildlife Conservation Network is dedicated to the support of conservation entrepreneurs who are working actively with local communities to protect endangered flagship species and preserve their natural habitats.

They focus on innovative, independent conservationists who are exploring new ways to resolve the conflicts between people and wildlife, and actively engage local people as effective stewards of their environment.

WCN provides conservation entrepreneurs with the financial, technical and administrative support that makes their work more efficient, effective and successful.

- One person with passion and a vision can make a profound difference. WCN believes in giving these individuals – their conservation entrepreneurs – the tools and support they need to be successful. And then they step back and let them do their job.
- WCN knows that the real work of conservation is done in the field. They rely heavily on volunteers and external underwriting so they can guarantee that 100% of designated donations goes directly to the specified project in the field, where it will have the greatest impact. (eg. Every minute that passes they lose more wilderness and wildlife...field conservation work is absolutely urgent.)
- WCN partners with organizations that bring the best people, strategies and technologies to the campaign to conserve wildlife. They focus on key “indicator species” where success requires that they have preserved a sustainable, diverse ecosystem.

- WCN believes that conservation works when local people implement local solutions. The best local solutions benefit people, wildlife and the environment. They build conservation capacity by engaging the training in these communities to ensure that the skills and conservation culture will be passed on to future generations.

www.wildnet.org/

Project IDEAS (Soros Foundation)

Project IDEAS is a new joint initiative of FOSI (Foundation Open Society Institute) and IFC (International Finance Corporation) to promote new and innovative approaches to business services for small and medium sized enterprises. The project is administered by the Economic and Business Development (EBD) program of OSI (Open Society Institute).

The acronym IDEAS stands for "Innovations in Developing Enterprise Assistance," and the emphasis belongs on "innovations." IDEAS will only support projects that are creative, innovative and unique. The approach is that of a early-stage venture capital fund who invests at high risks with the expectation of high returns, in this case, would be defined as high community impact.

www.soros.org

Avina Foundation

The AVINA Foundation partners with leaders of civil society and the business sector in their initiatives toward sustainable development in Ibero-America.

This includes the Spanish-speaking nations of America and Portuguese-speaking Brazil, plus the countries of the Iberian Peninsula (Spain and Portugal). We believe that sustainable development is a viable option for further improving human dignity, by making our capacity to satisfy our present needs compatible with the needs of future generations. Included in this process are those initiatives to promote equal access to opportunities, and encourage citizen participation, education, and eco-efficiency.

The values and principles that motivate AVINA are human dignity, equity of opportunities, freedom, social responsibility and respect for the environment.

http://www.avina.net/web/avinawebfinal3.nsf/LK_GCMask/HC522FBF2E7CFB944785256C3D006D396A?Open&LANG=Eng

Joshua Venture

Mission:

Joshua Venture supports and trains emerging Jewish social entrepreneurs to transform their visions into action. The program's primary goal is to strengthen a new generation of leaders who are launching or expanding innovative projects and organizations that contribute to a vibrant, just, and inclusive Jewish community.

www.joshuaventure.org

Resource Organizations

Canadian Centre for Social Entrepreneurship

Vision:

A pioneer in encouraging social entrepreneurship, the Canadian Centre for Social Entrepreneurship will be a recognized leader in strengthening community capability through strategic alliances creative thinking and innovative practices.

Mission:

To build their collective understanding of the scope of social entrepreneurship and to encourage entrepreneurial thinking and approaches in matters of interest between and within the voluntary, private and public sectors.

Goals:

- To become the hub for creating and sharing knowledge and practices of social entrepreneurship in Canada.
- To provide opportunities for dialogue which emphasize innovation in matter of social and economic importance.
- To encourage and support Canadian social entrepreneurs.
- To position the School of Business as a leader in social entrepreneurship.

<http://www.bus.ualberta.ca/ccse/Publications/>

Community Wealth Ventures (CWV)

Community Wealth Ventures is a consulting firm that:

Helps nonprofit organizations become more self-sustaining by generating revenue through business ventures and corporate partnerships.

Helps corporations improve their bottom line through the design and implementation of community investment strategies.

Through its consulting and research, CWV influences both nonprofits and corporations to think differently about market-based approaches to their social sector activity.

<http://www.communitywealth.org/>

The National Center for Social Entrepreneurs

The National Center is a nonprofit consulting company founded in 1985. It's mission is to increase the effectiveness and financial self-sufficiency of the nonprofit sector by helping individual nonprofits think and act in a more businesslike and entrepreneurial manner.

Up through the 1970s, nonprofits had little need to think like businesses or to be entrepreneurial. There was adequate government funding, scant competition and generous giving. But the nonprofit sector was “mugged by reality” over the next couple of decades, beleaguered by cuts in public support, increasing competition from a growing number of nonprofits, burgeoning demand for services, emerging social issues like AIDS and homelessness, and a host of other problems.

Whether bringing focus to current programs or taking advantage of new marketplace opportunities, the National Center is helping to change the organizational culture of its clients, from behaving like charities to acting like nonprofit businesses. The end result is a win-win-win scenario – more people in need receiving more services, less pressure on limited government and charitable resources, and a more self-reliant and financially self-sufficient nonprofit sector.

<http://www.socialentrepreneurs.org/>

Social Venture Network (SVN)

SVN promotes new models and leadership for socially and environmentally sustainable business in the 21st century. They champion this effort through initiatives, information services and forums that strengthen their community and empower their members to work together on behalf of the shared vision.

<http://www.svn.org/>

Social Enterprise Alliance

Vision:

Strong, self-sustaining nonprofits lead positive social change

Mission:

To build stronger, more effective nonprofit organizations by mobilizing a community of practitioners and investors to advance earned income strategies.

Social Enterprise Alliance is a network of support connecting entrepreneurial nonprofits with learning opportunities, technical assistance and resources to further their efforts.

www.se-alliance.org

Charles & Helen Schwab Foundation

The Schwab Family Foundation was created in 1993 to provide a structure for the family's philanthropy in grantmaking and partnerships. In 1997, the formation of the Children, Youth and Families program further defined the focus of the Foundation's work in human services. The following year, the Organizational Capacity Grants Initiative launched the Foundation into a three-year learning experience in strengthening the infrastructure and building the capacity of human service providers. Today, Human Services is one of two primary program areas of the Charles and Helen Schwab Foundation, focused in the issue areas of homelessness, substance abuse and poverty prevention, and emphasizing collaboration, capacity building, evaluation and knowledge sharing.

<http://www.schwabfoundation.org/>

Social Stimulus

Social Stimulus is a 501(c)(3) organization dedicated to inspiring innovation in the social sector. Formally launched in August of 2002, Social Stimulus is the evolution of another 501(c)(3) organization known as Volunteer Solutions.

Volunteer Solutions, winner of the 1998 MIT \$50K entrepreneurship competition, provides Internet based technology to manage the daily operations of a volunteer center. In 2001, the United Way of America acquired Volunteer Solutions as a means of providing the technology to all United Way volunteer centers. Michael Bryzek, founder of Volunteer Solutions and Ben Schlatka, Director of Marketing of Volunteer Solutions subsequently launched Social Stimulus with the explicit purpose of aiding other social entrepreneurs.

www.socialstimulus.org

The Enterprise Foundation

The Enterprise Foundation is building America, one community at a time. They work with partners to provide low-income people with affordable housing, safer streets and access to jobs and child care.

They provide loans, grants and technical assistance to nonprofit organizations that are building and revitalizing local neighborhoods. They have a national network of 2,400 nonprofit organizations, public housing authorities and Native American Tribes in 860 locations.

www.enterprisefoundation.org

WRI

Mission:

The World Resources Institute's mission is to move human society to live in ways that protect Earth's environment and its capacity to provide for the needs and aspirations of current and future generations.

Because people are inspired by ideas, empowered by knowledge, and moved to change by greater understanding, WRI provides -- and helps other institutions provide -- objective information and practical proposals for policy and institutional change that will foster environmentally sound, socially equitable development.

Goals:

Every project undertaken by WRI seeks to contribute to one or more of the following goals:

- Biological resources. To reverse damage to ecosystems. They protect the capacity of ecosystems to sustain life and prosperity.
- Climate change. To avert dangerous climate change. They promote public and private action to ensure a safe climate and sound world economy.
- Sustainable Enterprise. To harness markets and enterprise to expand economic opportunity and protect the environment.
- Access. To expand participation in environmental decisions. They collaborate with partners worldwide to increase people's access to information and influence over decision about natural resources.

www.wri.org

Inter-American Development Bank (IDB) Social Entrepreneurship Project

The IDB seeks to create a favorable environment for the development of the microenterprise sector in Latin America and the Caribbean. During the last ten years, the Bank has approved 712 microenterprise operations totaling more than \$700 million and reaching more than one million microentrepreneurs.

The IDB also supports the sector through operative and research initiatives. For example, through its Social Entrepreneurship Program (SEP) and Multilateral Investment Fund (MIF) operations, the IDB Group has invested in innovative projects that seek to boost incomes among women, member of indigenous communities, and other marginalized groups by encouraging social and community development.

<http://www.iadb.org/exr/topics/micro.htm>

Virtue Ventures LLC

Virtue Ventures LLC is a management consulting firm that provides affordable training, technology and consulting services to nonprofits, international development agencies, foundations, government agencies and private companies. Virtue Ventures specializes in bringing business practices to nonprofit organizations and assisting for-profits in their social endeavors. Our goal is to help clients effectively manage the delicate balance between their social mission and their financial objectives -- *their double bottom line*.

<http://www.virtueventures.com/>

Scarman Trust (UK)

The Scarman Trust investment in can do-ers involves small amounts of high risk money - "awards", typically around £2,000, delivered through a highly accessible process that includes extensive outreach. Funds come from key award partners, which include the Department for Education and Skills, for Community Champions, the Neighbourhood Renewal Unit and the Millennium Commission with the 'You and Your Community' Millennium Award Scheme.

Alongside the cash awards we provide a range of practical, personal and comprehensive support to award winners through a combination of assistance from our experienced local teams and by plugging individuals into appropriate networks. Awards winners will also have access to a national information service a range of community development tools, networking events, web site, phone conferences, and both face-to-face and distance learning to help to achieve their goals.

Around 1,500 new can doers are currently being supported by the Trust each year, through nine English Regional offices and one office in Wales and by March 2004 a total of over 4000 can doers will have been supported, who will in turn reach perhaps 500,000 others.

<http://www.thescarmantrust.org/>

New Economic Foundation (UK)

New Economic Foundation (nef) is an independent think and do tank that inspires and demonstrates real economic well-being.

We aim to improve quality of life by promoting innovative solutions that challenge mainstream thinking on economic, environment and social issues. We work in partnership and put people and the planet first.

nef was founded in 1986 by the leaders of The Other Economic Summit (TOES) which forced issues such as international debt onto the agenda of the G7 and G8 summits.

We are unique in combining rigorous analysis and policy debate with practical solutions on the ground, often run and designed with the help of local people. We also create new ways of measuring progress towards increased well-being and environmental sustainability.

nef works with all sections of society in the UK and internationally - civil society, government, individuals, businesses and academia - to create more understanding and strategies for change.

<http://www.neweconomics.org/gen/>

SVT Consulting

SVT provides analysis and verification of the quantifiable social impact of investment opportunities. We offer a proven method of analysis of a variety of social and environmental benefits to a variety of stakeholders, resulting in a verifiable social return, expressed as an internal rate of return (IRR), net present value (NPV), return on investment (ROI) on projected social impact cash flows. These are solid and traceable figures that will allow you to compare and monitor the social side of your projects and investments.

- Evaluate and compare the social impact of investments.
- Monitor and manage your double bottom line.
- Gain exposure to the social investment community.

www.svtconsulting.com/socialreturns

Innovation Network (Innonet)

Mission:

Innovation Network's mission is to improve nonprofit results by building evaluation capacity.

Working with nonprofits and funders through evaluation consulting, training, Web-based tools, and outreach, they seek to increase evaluation and planning knowledge and skills for the entire field, and to build the ability of individual nonprofits to meet their missions.

Teaching nonprofits to measure their impact gives them the power to create lasting change.

www.innonet.org

Urban Institute

The Urban Institute measures effects, compares options, shows which stakeholders get the most and least, tests conventional wisdom, reveals trends, and makes costs, benefits, and risks explicit.

www.urban.org

Community Action Network (UK)

Aims:

- to strengthen communities and attack deprivation in the UK
- to increase the number of social entrepreneurs, raise their profile and to help improve the quality of their work
- to train social entrepreneurs to use state of the art network communications
- to learn from and support each other
- to help social entrepreneurs develop partnerships in the public, private and Third sectors

www.can-online.org.uk/

Change Makers.net

Changemakers is an initiative of [Ashoka: Innovators for the Public](#) that focuses on the rapidly growing world of social entrepreneurship. Its mission is to provide inspiration, resources, and opportunities for those interested in social change throughout the world.

www.changemakers.net

Seo-online: The Directory of Social Entrepreneurial Organizations (UK)

Social entrepreneurs have created this web site for social entrepreneurs and those who work with them. Here you will find the best single source of data about social entrepreneurs in England.

For the media, funders, government officials and researchers, they offer a one-stop-shop for information on a rapidly growing and influential sector. For social entrepreneurs, the site is a place to trade information, insight, products and services. They want to raise the profile of social entrepreneurial organizations and help them to deliver even more cutting edge solutions.

www.seo-online.org.uk

School for Social Entrepreneurs (UK)

The School for Social Entrepreneurs exists to provide training and opportunities to enable people to use their creative and entrepreneurial abilities more fully for social benefit. They also want to recruit more innovative and capable people into voluntary and other organizations.

www.sse.org.uk/network/

The Institute for Social Entrepreneurs

Mission:

The Institute for Social Entrepreneurs provides education, training and consulting services for social entrepreneurs in the United States and abroad

www.socialent.org

The Northland Institute

The Northland Institute was established in 1996 as a non-profit 501 (c) (3) subsidiary corporation of the Northland Foundation. The Institute evolved out of the work done by the Northland Foundation for the Ford Foundation in identifying factors that contribute to successful partnerships between Regional Development Organizations and community-based groups.

Mission:

The mission of the Northland Institute is to develop innovative asset-building strategies for low-income individuals, entrepreneurial non-profits and community economic development organizations. The Institute is pursuing its mission primarily through the establishment of Business-assisted Individual Development Account (IDA) programs, training and educational support for social entrepreneurs, and the design of new products and services for the economic development finance field.

www.northlandinst.org

Social Enterprise Group, LLC

The Social Enterprise Group is a unique consulting firm that provides business planning, feasibility studies, fund procurement, market analysis, strategic planning and associated services to nonprofits, businesses, philanthropic organizations and government agencies who are conducting, or considering, a social enterprise.

<http://www.socialenterprise.com/>

UK Social Enterprise Coalition

SEC was established in July 2002 to provide a co-ordinated voice for social enterprise and enable stakeholders to work together to develop the sector. It grew out of the recognition that although social enterprise is a rapidly growing and exciting sector of the economy, and one that has enormous potential, it has hitherto been fragmented and disorganised. This means that setting up a social enterprise in the UK is not always easy. Government initiatives can be encouraging but the bureaucracy is difficult to negotiate and the legal structures bewildering. Banks, financial institutions and regional and local administrations do not always fully understand the needs of social enterprise, and such institutions will not support and finance businesses they do not understand.

www.socialenterprise.org.uk

Sustainable Enterprise Program

For more than a decade, WRI's Sustainable Enterprise Program has harnessed the power of business to create profitable solutions to environment and development challenges. WRI is the only organization that brings together corporations, entrepreneurs, investors, and business schools to accelerate change in business practice. The program improves people's lives and the environment by helping business leaders and new markets thrive.

<http://www.wri.org/sep/>

Aga Khan Development Network

The Aga Khan Development Network (AKDN) focuses on health, education, culture, rural development, institution-building and the promotion of economic development. It is dedicated to improving living conditions and opportunities for the poor, without regard to their faith, origin or gender.

<http://www.akdn.org/>

Development Trusts Association (UK)

The DTA encourages the exchange of information and good practice by supporting nine regional networks and numerous specialist forums. We conduct research, publish a quarterly information bulletin, and a range of publications.

The DTA promotes the work of development trusts, advocates on their behalf by commenting on and contributing to public policy developments, briefing and lobbying central and local government, and liaising with a wide range of organisations at regional, national and European level.

The DTA's mission is to bring about a successful development trust in every community that wants one.

<http://www.dta.org.uk/index2.html>

Mennonite Economic Development Association (MEDA)

Since 1953, MEDA has been serving the poor through the development of business by providing credit, business training, marketing and technical assistance. Our mission is to promote economic growth to the benefit of and in partnership with poor people in Low Income Countries. This is accomplished through a business-oriented approach to development which results in sustainable enterprises.

Our programming is built on the understanding that development is a process whereby people more fully realize God's intentions for them, for their families, for their communities and for all creation. Development is participation in God's redemptive work.

<http://www.meda.org/international/>

Academic Institutions

Center for Advancement of Social Entrepreneurs (Duke's Fuqua School of Business)

Mission and Goals:

CASE is a research and education center dedicated to promoting social entrepreneurship through a mutual learning process that engages social sector leaders, business school faculty, and MBA students. Their primary goal is to create greater social impact by encouraging innovation and enhancing effectiveness in social sector organizations. Their secondary goal is to help affiliated faculty and students gain insights and abilities that will enhance their impact in both their business and social sector endeavors. The establishment of CASE at the Fuqua School of Business has been made possible through the generous seed funding of Atlantic Philanthropies.

<http://faculty.fuqua.duke.edu/centers/case/index.htm>

Center for Social Innovation (Stanford Business School)

The Center for Social Innovation promotes innovative, effective, and efficient solutions to social problems in the United States and around the world through research, teaching, and outreach. The Center pursues this mission in a number of ways: adapting business knowledge, experience, and skills to the challenges facing managers and organizations working to improve social conditions; bringing academic rigor to the generation of new knowledge that enhances their collective understanding of the social sector; and supporting and facilitating inquiry that illuminates the fundamental nature of important social problems.

<http://www-gsb.stanford.edu/csi/>

Columbia Business School – Social Enterprise Program

The Social Enterprise Program engages a far-reaching network of academic and business leaders who share a vision for finding innovative ways to generate social benefit through business practices. These networks not only add exponentially to the MBA experience but also enrich the ongoing professional experience and learning of alumni.

<http://www-1.gsb.columbia.edu/socialenterprise/>

Harvard Business School Initiative on Social Enterprise

The Initiative on Social Enterprise is a collaboration of HBS faculty, students, alumni, and staff that leverages the School's core strengths to promote excellence in the leadership of nonprofit, private, and public-sector enterprises. Through a broad portfolio of activities, ISE creates opportunities for dynamic learning between all sectors, strengthening the ability of individuals and organizations to deliver social and economic value.

Kauffman Center for Entrepreneurial Leadership

The Ewing Marion Kauffman Foundation works with partners to encourage entrepreneurship across America and improve the education of children and youth. The Foundation focuses its operations and grantmaking on two areas: entrepreneurship and education.

They strive to foster an environment nationwide in which entrepreneurs have the information and tools they need to succeed. The Kauffman Foundation promotes entrepreneurial success at all levels. They work with leading educators and researchers nationwide to create awareness of the powerful economic impact of entrepreneurship, to develop and disseminate proven programs that enhance entrepreneurial skills and abilities, and to improve the environment in which entrepreneurs start and grow businesses. Their entrepreneurship Web site — <http://www.entreworld.org> — is devoted to this topic and provides more information about programs and resources in this arena.

www.emkf.org

London School of Economics Center for Civil Society

Through research, teaching, convening and dissemination, CCS seeks to add to their knowledge about the types, roles and contributions of civil society and social economy institutions in Britain, Europe and other parts of the world. CCS seeks to improve understanding of the whole set of organizations located between the market, the state and the family-institutions that are variously referred to as non-governmental, voluntary, or non-profit organizations, foundations and social enterprises. These institutions of civil society form a social economy of private organizations serving public and semi-public purposes. In all its activities, CCS is at the forefront of this rapidly growing field. The Centre's mission is:

... to become the European academic centre of excellence for the study of civil society, social economy, non-profit or third-sector organizations and philanthropy...

www.lse.ac.uk/collections/CCS/

Sterling College Social Entrepreneurship Program

The purpose of *Sterling College* is to develop creative and thoughtful leaders who understand a maturing Christian faith.

www.stercolks.edu/academics/catalog/20012002/majors/se_minor.cfm

University of North Carolina Center for Sustainable Enterprise

The Center for Sustainable Enterprise offers education programs, research and outreach to help companies and non-profit organizations grow and profit in non-traditional and emerging markets with economically, environmentally and socially sustainable strategies. Organizations or prospective students seeking more information on sustainable enterprise are encouraged to contact the Center or its directors for more information.

<http://www.kenan-flagler.unc.edu/sei/overview.htm>

Initiatives

The Aspen Institute NSRF's Intersectoral Relations Initiative

The Aspen Institute is an international non-profit organization dedicated to informed dialogue and inquiry on issues of global concern. Founded in 1950, it has pursued its mission of fostering enlightened leadership through seminars, policy studies and fellowship programs. The Institute is headquartered in Washington, DC, and has campuses in Aspen, Colorado, and on the Wye River on Maryland's Eastern Shore. Its international network includes partner Aspen Institutes in Berlin, Rome, Lyon and Tokyo, and leadership programs in Africa.

www.aspeninstitute.org/Programt3.asp?bid=972

The Fourth Sector Network Concept Workgroup

Over the past few decades, the boundaries between the public (government), private (business), and social (non-profit/non-governmental) sectors have been blurring, while a Fourth Sector of organization has been emerging. The archetypal Fourth Sector model is sometimes referred to as a For-Benefit organization, and the sector itself is also referred to as the For-Benefit Sector. There are a wide variety of other Fourth Sector models and approaches, bearing different names and emphasizing or embodying different aspects of the For-Benefit model.

<http://www.fourthsector.net/>

National Social Venture Competition (Haas School of Business at UC Berkeley)

The National Social Venture Competition began in 1999 as a student-led initiative at the Haas School of Business. In May 2001, Columbia Business School and The Goldman Sachs Foundation partnered with Haas to extend the reach of the competition and help grow a national platform for social ventures. The unprecedented partnership brings together the academic and financial worlds to support the creation of social ventures—businesses with financial and social returns on investment.

Mission:

The Competition's mission is to catalyze and promote the creation of financially self-sufficient or profitable social ventures. To achieve this goal, plans will be judged according to the feasibility of their business concepts, and the feasibility and potential impacts of the stated social and/or environmental goals.

www.socialvc.net

ASHOKA Accelerator for Social Entrepreneurship

Mission:

Ashoka's mission is to develop the profession of [social entrepreneurship](#) around the world. Ashoka invests in people. It is a global non-profit organization that searches the world for social entrepreneurs—extraordinary individuals with unprecedented ideas for change in their communities. Ashoka identifies and invests in these social entrepreneurs when no one else will.

www.ashoka.org

Research Initiative on Social Entrepreneurship (RISE) – Columbia Business School

Mission and Overview:

Launched in early 2002, RISE is a project at Columbia Business School whose mission is to study and disseminate knowledge about the markets, metrics and management of for-profit and nonprofit social enterprise and social venturing.

RISE is sponsored within Columbia Business School by the Social Enterprise Program and the Eugene M. Lang Center for Entrepreneurship.

RISE deepens learning opportunities for students and practitioners by focusing on key issues in current practice of social enterprise, social investing and social venturing. RISE concentrates on people working where the lines of previously distinct nonprofit and for-profit sectors start to blur, in what Jed Emerson of the Hewlett Foundation and J. Greg Dees of Duke University have both called a new "hybrid" space for social entrepreneurship.

RISE studies the growing practice of building profit and nonprofit ventures that aim to achieve social and financial impact through their products, services and other business practices, and the entities that fund them. RISE explores issues of nonprofit organizations building capacity and using business practices to sustain their growth, as well as issues for for-profit companies trying to achieve social impacts as well as financial returns. RISE works collaboratively with investment funds around the country as well as foundations, other universities and intermediary groups to define, explore and report on key issues of interest to this developing field.

www.riseproject.org

Social Edge Online Community

Mission:

The Skoll Foundation advances systemic change to benefit communities around the world by investing in, connecting and celebrating social entrepreneurs.

Vision:

Their vision is to live in a world of peace and prosperity where all people, regardless of geography, background, or economic status, enjoy and employ the full range of their talents and abilities.

www.skollfund.org/community

Strategic Solutions Project (La Piana Assoc.)

Strategic Solutions is a five-year, foundation-funded initiative dedicated to achieving a major and lasting positive impact on the nonprofit sector's perception, understanding, and use of strategic restructuring - thereby increasing the capacity of organizations to advance their missions.

www.lapiana.org/project

Social Enterprise

General Overview – Nonprofit Specific

Social Enterprise

General Overview – Nonprofit Specific

Information Resources (Books, Articles, Websites)

“Enterprising Nonprofits” book by Dees, Emerson, Johnson, and Economy

Dees, Gregory, Jed Emerson, Rob Johnston, Peter Economy. Enterprising Nonprofits. John Wiley and Sons, 2001

Enterprising Nonprofits helps nonprofits embrace the methods of social enterprise -- the adoption of entrepreneurial behaviors and techniques by nonprofit, community-oriented organizations. This accessible, hands-on toolbox for all levels of employees working in all kinds of socially oriented organizations features some of the best and the brightest thinkers and practitioners in the field.

<http://www.pfd.org/leaderbooks/johnston/enterprising.html>

“The Entrepreneurial Nonprofit Executive” book by McLaughlin

McLaughlin, Thomas A. The Entrepreneurial Nonprofit Executive. Traft Group, 1991.

<http://www.amazon.com/exec/obidos/ASIN/0930807227/inktomi-bkasin-20/103-0341049-2699026>

npEnterprise Forum Listserve

In this forum, they discuss practical steps nonprofits can take to earn income from selling products and services.

Common topics include:

- 1) The risks and rewards of earned income activities
- 2) How to assess whether your organization is "ready" to pursue earned income strategies
- 3) What are the options for generating earned income (e.g., in-house activities, for profit subsidiaries, free-standing ventures, corporate partnerships, etc)
- 4) How to identify potential earned income opportunities suitable to your organization
- 5) How to do market and feasibility research to evaluate an earned income opportunity
- 6) How to prepare a strong business plan
- 7) How to secure funding for your opportunity

8) How to integrate business planning and earned income strategies into the daily management of your organization

<http://www.npenterprise.net/>

“Hidden in Plain Sight: Understanding Nonprofit Capital Structure” by C. Miller

Published in the Spring 2003 edition of The Nonprofit Quarterly, this article on nonprofit capitalization by NFF President and CEO Clara Miller builds on research emanating from NFF lending and advisory experience. “Hidden in Plain Sight: Understanding Nonprofit Capital Structure,” explores the relationship between mission, organizational capacity and capital structure. It is part of our ongoing research and development examining the effect of capital structure on nonprofit programs. Included within the article are two shorter pieces: “Elements of Capital Structure,” exploring its definition, and “Capital-Savvy Principles for Grantmakers,” highlighting the role funders often play in the undercapitalization of nonprofits and how to reverse that pattern.

http://www.nonprofitfinancefund.org/docs/Miller_Capital_Structure.pdf

<http://ventures.yale.edu/> **website**

The Resource Center provides cutting edge research and business tools to nonprofit organizations interested in commercial ventures, and offers ways for nonprofits to share their own experiences with others in the field.

<http://www.ventures.yale.edu/aboutresourcecenter.asp>

“Pricing In Nonprofit Ventures” by S. Oster
Yale School of Management/Goldman Sachs Foundation Website

The Partnership on Nonprofit Ventures is a major initiative at the Yale School of Management focusing on social entrepreneurship in the nonprofit sector. The Partnership was created to respond to a growing interest in income generation among nonprofit organizations. Many of these organizations seek to supplement their philanthropic activity with business income, but need assistance to do so. With major funding from The Pew Charitable Trusts and The Goldman Sachs Foundation, The Partnership educates nonprofits about nonprofit enterprise, serves as a mechanism for capitalizing promising profit-making ventures with financial support, and provides intellectual capital to build the practice of social entrepreneurship in the nonprofit sector at-large.

<http://www.nationalcne.org/pubs/oster01.htm>

“Enterprising Nonprofits: Revenue Generation in the Nonprofit Sector” by C. Massarsky & S. Beinhacker

http://www.ventures.yale.edu/docs/Enterprising_Nonprofits.pdf

“The Meaning of Social Entrepreneurship” by G. Dees

<http://www.gsb.stanford.edu/csi/SEDefinition.html>

“Social Enterprise: Private Initiatives for the Common Good” by G. Dees and E. Backman

Dees, G and Elaine Backman, “Social Enterprise: Private Initiative for the Common Good,” Harvard Business School, Publishing Division 9-365-116, 1994.

http://harvardbusinessonline.hbsp.harvard.edu/b02/en/common/item_detail.jhtml?id=395116

Charity Village.com Website

<http://www.charityvillage.com>

“The Nonprofit Entrepreneur: Creating Ventures to Earn Income” book by Ed Skloot

“*The Nonprofit Entrepreneur: Creating Ventures to Earn Income*” edited by Ed Skloot, Foundation Center, September 1998.

<http://www.empoweryou.com/nonprofitfoundationbooks.html>

The Comparative Nonprofit Sector Project Website

More specifically, the Johns Hopkins Comparative Nonprofit Sector Project seeks to:

- Document the scope, structure, financing, and role of the nonprofit sector for the first time in solid empirical terms in a significant number of countries scattered widely throughout the world;
- Explain why this sector varies in size and character from place to place and identify factors that seem to encourage or retard its development;
- Evaluate the impact these organizations are having and the contribution they make;
- Publicize the existence of this set of institutions and increase public awareness of them; and
- Build local capacity to carry on this work into the future.

www.jhu.edu/~cnp/

“The 21st Century NGO” Report by Sustainability

This report is SustainAbility’s seventh survey of the NGO landscape, but it is the first to be supported by a wide consortium of NGOs as well as public and private sector partners.

The 21st Century NGO is designed for a mixed readership. Primary audiences are NGOs and their funders, but they also believe that the study will be of interest to people from the business community who want to better understand what tomorrow’s NGO will look like, and where their agenda is headed.

<http://www.sustainability.com/publications/latest/21C-ngo.asp>

Seedco’s Nonprofit Venture Network (NVN) Program

The Nonprofit Venture Network (NVN) offers community-based nonprofit organizations a comprehensive package of technical assistance and financing designed to enhance their capacity to launch Social Purpose Businesses. While there are several definitions of Social Purpose Businesses, for purposes of NVN they define it as a business activity started by a nonprofit organization that applies market-based solutions for the purposes of furthering the mission of the organization, generating income, and addressing social needs.

www.seedco.org/nvn/

“Powering Social Change: Lessons on Community Wealth Generation for Nonprofit Sustainability” report by CWV

Community Wealth Ventures' most recent report, *Powering Social Change*, is a comprehensive overview of social enterprise in the United States, including essays, case studies, practical lessons, and survey results for organizations seeking to diversify their revenue streams.

<http://www.communitywealth.org/Powering%20Social%20Change.pdf>

“Unleashing New Resources & Entrepreneurship for the Common Good by T. Reis

<http://www.wkkf.org/Pubs/PhilVol/Pub592.pdf>

NESsT Publications

<http://www.nesst.org/DOCS/OrderForm.pdf>

“Evolution or Extinction: A Strategy for Nonprofits in the Marketplace by E. Skloot

Keynote address at the annual meeting of the California Association of Nonprofits, Oakland, CA, October 22, 1999.

<http://www.surdna.org/speeches.html>

“Enterprising Non-Profits Program: A Report on Non-Profits and their Social Enterprises 2000-2002”

This report looks at 33 organizations, that have been funded by the Enterprising Non-Profits Program to develop or to expand their social enterprises. You will learn more about the funding program and gain a better understanding of the progress and experiences of the non-profits at different stages of business development. A must read for foundations, credit unions, non-profits, government and other organizations or investors interested in social enterprise.

To learn more about these important findings, download free of charge the full report on the websites of the funding partners: www.vancity.com/vcf; www.vancouverfoundation.bc.ca; www.uwlm.ca; and www.coastacapitalsavings.com.

“Goal: Strong Nonprofits Going to the Next Level” by T. Backer & J. Bare

“Goal: Strong Nonprofits: Going to the Next Level” by Thomas E. Backer and John Bare, Foundation News & Commentary, Sept-Oct 2000, Vol. 41, No. 5.

<http://www.foundationnews.org/>
<http://www.ventures.yale.edu>

“Strategic Planning for Public and Nonprofit Organizations” by J. Bryson

“Strategic Planning for Public and Nonprofit Organizations : A Guide to Strengthening and Sustaining Organizational Achievement” by John Bryson, Jossey-Bass, November 1995.

[http://www.industry-reviews.com/Strategic Planning for Public and Nonprofit Organizations A Guide to Strengthening and Sustaining Organizational Achievement 0787901415.html](http://www.industry-reviews.com/Strategic_Planning_for_Public_and_Nonprofit_Organizations_A_Guide_to_Strengthening_and_Sustaining_Organizational_Achievement_0787901415.html)

“Goal: Strong Nonprofits: How to ‘Do’ Capacity Building” by L. Draper

“Goal: Strong Nonprofits: How to ‘Do’ Capacity Building” by lee Draper, Foundation News & Commentary, Sept-Oct 2000, vol. 41, No. 5.

<http://www.foundationnews.org/>
<http://www.ventures.yale.edu>

“Virtuous Capital: What Foundations Can Learn from Venture Capitalists” by C. Letts, W. Ryan and A. Grossman

"Virtuous Capital: What Foundations Can Learn from Venture Capitalists" Christine W. Letts; William Ryan; Allen Grossman, 3/1/97 (Harvard Business Review article, reprint #97207)

http://harvardbusinessonline.hbsp.harvard.edu/b01/en/hbr/hbr_home.jhtml

“Social Entrepreneurship book by Brikerhoff

Until very recently, popular belief held that business skills were not needed at charitable organizations. No longer. Far from interfering with an organizations ability to provide needed services, techniques such as marketing, cash flow analysis, property management, and good use of technology all contribute to a charitable organizations mission capability. Unlike a not-for-profit that thinks of itself as a charity, the successful not-for-profit is really a mission-based business. In an era of rapid change, increasing competition, and the need for more accountability to governments, foundations, insurers, and donors, knowing how to innovate, compete, and take reasonable risks on behalf of the mission is critical. It is, in short, the era of the social entrepreneur.

The skilled social entrepreneur has the ability to get the most mission out of the resources at hand—including traditional business techniques. Finally, here is a book that will help you learn their techniques. In Social Entrepreneurship, you will learn how successful social entrepreneurs:

- Focus on community wants and needs
- Match those with core competencies to provide the quality services
- Assess risk and gauge opportunity
- Develop new project ideas and test their feasibility
- Write a business plan
- Project finances in the plan
- Tap into new sources of funding
- Develop the idea of social entrepreneurship throughout the organization
- Make sure that mission, not money, is the bottom line

Also included are the seven essential steps of the not-for-profit business development process, real-world case studies, sample business plans, and a self-assessment process to determine if your organization is ready for social entrepreneurship. In addition to entrepreneurs, middle managers, policy setters, volunteers, and a host of other important staff members will get value from the mission-beneficial information in this book. Most important, Social Entrepreneurship will help you to help your organization succeed and thrive—and make your job more interesting and productive.

<http://www.amazon.com/exec/obidos/tg/detail/-/0471362824/104-5698325-8867125?v=glance>

Counterpart International

Economic, social and environmental viability are key components for Counterpart's programs with sustainable development of new enterprises.

<http://www.counterpart.org>

“A Scan of Not-for-Profit Entrepreneurship: Status of the Field & Recommendations for Action” by L. Spinali & H. Mortimer

“A Scan of Not-for-Profit Entrepreneurship: Status of the Field and Recommendations for Action,” submitted to Kauffman Center for Entrepreneurial Leadership the the Ewing Marion Kauffman Foundation, prepared by Lisa Spinali and Hayley Mortimer, Ripple Effect Consulting, January 31, 2001.

http://www.entreworld.org/Bookstore/PDFs/Futures21/NPS_Scan.pdf

“Measuring the Impact of the Nonprofit Sector” by P. Flynn and V. Hodgkinson

In this book 18 scholars explore research approaches, methodologies, and issues associated with measuring empirically the performance and effectiveness of nonprofit organizations. Authors discuss obstacles to measuring nonprofit performance — including how factors such as mission vagueness can complicate the task — as well as the current state of research on the performance of nonprofit organizations, and the measurement of specific types of groups such as arts or religious organizations.

<http://www.flynnresearch.com/measuimp.html>

“The State of Nonprofit America” by L. Salamon

This book offers an overview of the state of America's nonprofit sector, and to identify the changes that might be needed to promote its long-term health. To do so, it assembles a set of original essays prepared by leading authorities on key components of the American nonprofit scene and on the key trends affecting their evolution.

http://www.brookings.edu/dybdocroot/press/press_hp.htm

Resource Organizations

Capital Markets Access Program

The goal of the CPP is to link businesses with CDCs resulting in investment in CDC areas. The CPP staff has been working hard to develop specific tools which will encourage businesses to make these investments. Particularly because of the negative image associated with emerging markets, it is often difficult for investors to raise capital.

Accordingly, the CPP has launched several initiatives to provide improved access to capital for businesses which want to invest and operate in CDC areas.

<http://www.ncced.org/cpp/accessCap.html>

National Center on Nonprofit Enterprise (NCNE)

The National Center on Nonprofit Enterprise helps managers and leaders of nonprofit organizations make wise economic decisions in order to ensure that their organizations best serve their members, clients, donors and the general public by pursuing their social missions efficiently and effectively.

www.nationalcne.org

Npower

NPower is a growing network of independent, locally based nonprofits dedicated to one thing: Putting technology know-how in the hands of nonprofits. NPower's mission is to ensure all nonprofits can use technology to expand the reach and impact of their work.

- They are mission driven and passionate about the work of nonprofits.
- They are committed to providing services of the highest quality.
- They believe innovation and service delivery happen best at the local level.
- They are distinguished by their commitment to open and active knowledge-sharing.

www.npower.org

Non Profit Wealth

What we do:

- § Help develop a new financial vision.
- § Review current financial position.
- § Assist in structuring agency financial goals.
- § Develop RFPs for underwriters, banks, and attorneys.
- § Read all financing documents.
- § Assure fees are fair.
- § Assist in selecting fund managers and investment policies.
- § Help decide whether to use variable or fixed rate debt.
- § Provide information on interest rate management products.

<http://home.att.net/~nonprofitwealth/wsb/html/view.cgi-about.html-.html>

Seedco

Founded in 1986, Seedco provides financial and technical assistance, and management support, for the community-building efforts of nonprofit organizations and small businesses in targeted disadvantaged communities throughout the United States. Working in partnership with local community organizations, universities, and other local and national groups, Seedco develops and supports wide-ranging initiatives that support working families, promote community economic development, and strengthen community-based nonprofits. Seedco's approach focuses on increasing its community partners' capacity to implement high-impact projects that build community and individual assets.

www.seedco.org

Roberts Enterprise Development Fund (REDF)

The Roberts Enterprise Development Fund, featured in The Chronicle of Philanthropy, evolved out of a six year effort to expand economic opportunity for homeless and very low-income individuals through the creation of social purpose business ventures. These businesses, free of "training" time limits imposed by traditional government funded efforts, could employ individuals for longer periods of time and were operated by nonprofits in order to provide transitional and permanent employment to individuals outside the economic mainstream.

www.redf.org

Canadian Women's Foundation

The Canadian Women's Foundation is dedicated to long-term systemic change that will bring about the equality of women and girls in Canada.

The Foundation grants funds for innovative and diverse programs and projects designed to help women and girls achieve greater self-reliance and economic independence.

The Foundation seeks support from individuals, organizations and institutions who value the opportunity to contribute financially to the development of equality in Canadian society.

<http://www.cdnwomen.org/eng/index.htm>

Nonprofit Enterprise and Self-Sustainability Team (NESsT)

Mission:

NESsT's mission is to further the financial sustainability of CSOs working for social change and development through the use of entrepreneurial, self-financing strategies.

To achieve their mission, NESsT has defined three key thematic areas for their work: applied research, capacity building, and policy and outreach. These three inter-linked areas are components of all NESsT Initiatives:

- **applied research:** NESsT documents and disseminates lessons learned from self-financing strategies to help evaluate the feasibility, effectiveness, and potential replicability of self-financing among CSOs;
- **capacity-building:** NESsT builds the capacities of individual CSO leaders and organizations by providing access to financial resources, expertise and tools to help CSOs implement self-financing enterprises effectively and responsibly;
- **policy and outreach:** NESsT advances the awareness, critique and support of self-financing among CSO leaders, donors and policymakers in an effort to create a more accessible and diverse nonprofit capital market.

www.nesst.org

Alliance for Nonprofit Management

The *Alliance* for Nonprofit Management is the professional association of individuals and organizations devoted to improving the management and governance capacity of nonprofits - to assist nonprofits in fulfilling their mission

<http://www.allianceonline.org/>

The National Council of Nonprofit Associations

The National Council of Nonprofit Associations (NCNA) is a 501(c)(3) membership-based organization of state and regional associations that represent thousands of nonprofits throughout the country. Their members work at the state and local level to provide training and technical assistance to improve the operations and effectiveness of organizations while promoting the value and accountability of the nonprofit sector.

Mission:

The mission of NCNA is to advance the vital role and capacity of the nonprofit sector in civil society and support and give voice to state and regional associations of nonprofit organizations. By representing the views and concerns of its state and local members NCNA serves as a credible voice and champion of the sector at the national level.

www.ncna.org

Boston College Social Welfare Research Institute

Founded in 1970, the Social Welfare Research Institute (SWRI) is "a multidisciplinary research center specializing in the study of philanthropy and other aspects of cultural life in an age of affluence." SWRI is a recognized authority "on the relationship between economic wherewithal and philanthropy, the motivations for charitable involvement, and the underlying meaning, and practice of care."

http://www.independentsector.org/pathfinder/resources/acad_ctrs/soc_wel.html

CompassPoint Nonprofit Services

CompassPoint Nonprofit Services is a nonprofit training, consulting and research organization with offices in San Francisco and Silicon Valley. Through a broad range of services, we provide nonprofits with the management tools, concepts and strategies necessary to shape change in their communities.

<http://www.compasspoint.org/>

Academic Institutions

Yale School of Management – The Goldman Sachs Foundation Partnership on Nonprofits Ventures

The Partnership on Nonprofit Ventures provides educational and financial support for nonprofit enterprise. The Partnership offers business planning assistance, cash awards, and access to the investment community through its National Business Plan Competition for Nonprofit Organizations. Information and guidance on launching nonprofit ventures are available through an Online Resource Center. Nonprofit organizations receive networking and training opportunities at the Annual Conference and Awards Ceremony.

www.ventures.yale.edu

Kellogg School of Management – Public/Nonprofit Management Program

The Public / Nonprofit Management Program (PNP) enables students to develop competencies and skills tailored to their career interests—whether in government, nonprofits or firms where knowledge of these sectors are critical. their graduates may be found in every nonprofit subfield from arts and education to non-governmental organizations (NGO's) and in the private sector from consulting to finance

www.kellogg.nwu.edu/academic/nonprofit/index.htm

University of Michigan Nonprofit and Public Management Center

Mission:

The Nonprofit and Public Management Center (NPM) is a collaboration of the Schools of Business, Public Policy, and Social Work. their mission is to advance and promote understanding of the contributions of nonprofit and public organizations and the challenges of leading them successfully.

Our educational mission is to build the University of Michigan's capacity to offer sophisticated and comprehensive educational opportunities for professional school students who seek to understand the role and management of nonprofit and public organizations. They have three related goals:

1. Educate professional students who aspire to manage programs and organizations in the nonprofit and public sectors, bringing the best management knowledge to the service of their careers and to the success of their organizations.
2. Educate professional students who intend to work in the private sector, or in nonmanagerial roles in the public or nonprofit sectors, giving them the skills and understanding to work effectively in partnership across sectors, and to work effectively as board members, volunteers, advocates, or advisors to build the competence of the nonprofit and public sectors.
3. Educate all interested students about the distinctive roles and contributions of the nonprofit sector, so that they understand one of the major ways in which societies mobilize resources to address a variety of problems and challenges.
4. Our research mission is to create a stimulating and supportive environment for faculty and doctoral students with interest and expertise in the nonprofit and public sector. Seminars, speakers, and conferences make it possible for faculty to learn from their colleagues in other schools and disciplines, and to develop a broader perspective on the challenges facing managers in the nonprofit and public sectors. They promote research, theory, and methodological tools to learn more about nonprofit and public management.

www.umich.edu/~nonprofit/

Heriot Watt University Social Enterprise Institute (Scotland)

Heriot-Watt University has established a Social Enterprise Institute (SEI) located at its Edinburgh Campus. The business of the institute is the provision of research, training, business planning, education and consultancy services for all stakeholders in the social economy.

Social Enterprises are sustainable businesses that exist to achieve some form of social mission or objective. In order to succeed, they need to trade successfully in markets. Social Enterprises can be identified through three common characteristics: enterprise orientation, explicit social aims and some form of social ownership.

Social enterprises re-invest their profits/surpluses in the business or in the community, rather than being driven by the need to maximise profit for shareholders and owners.

As part of the School of Management and Languages, the SEI is concerned with the dissemination of best practice relating to these "not for profit" businesses and their leadership. In order to achieve this, the SEI will organize an annual programme of conferences and seminars.

<http://www.sml.hw.ac.uk/socialenterprise/>

Social Enterprise

Leadership Examples

Leadership Examples

For Profits

Thanksgiving Coffee

Thanksgiving Coffee Company (TCC) is a roasting and distribution company located on the harbor in Fort Bragg, California. Thanksgiving currently roasts 600-700,000 pounds of coffee annually and employs around forty people.

www.thanksgivingcoffee.com

CitySoft

CitySoft's mission is to deliver exceptional, client-focused Internet services to Common Interest Enterprises while maintaining a commitment to urban economic opportunities.

www.citysoft.com

Bedrock Industries

Bedrock Industries was established in 1993. Founder Maria Ruano was eager to create gifts and architectural materials of singular beauty, yet she was also impatient with the waste and reckless disregard for raw materials in modern manufacturing. She wanted to develop a new model and that is just what happened.

www.bedrockindustries.com

Minnesota Diversified Industries

MDI creates employment for people with disabilities and disadvantages by achieving operational self-sufficiency as a nonprofit corporation.

MDI carries out its mission in state-of-the-art industrial operations that provide outsource plastic manufacturing and conversion, fulfillment, assembly and packaging.

<http://www.mdi.org/>

ITDG (UK)

Is small still beautiful? We think it is. In an increasingly divided and fragile world, ITDG – the Intermediate Technology Development Group – aims to demonstrate and advocate the sustainable use of technology to reduce poverty in developing countries.

<http://www.itdg.org/>

Cooperative Home Care Associates

Headquartered in the heart of the South Bronx, Cooperative Home Care Associates (CHCA) is a worker-owned home health care agency that currently employs more than 550 African-American and Latina women—75% of whom had previously been dependent on public assistance.

<http://www.chcany.org/>

AgroKasa (Peru)

SOCIEDAD AGRICOLA DROKASA S.A. (AGROKASA) is one of the enterprises of the CORPORACION DROKASA S.A. dedicated to the agricultural and agribusiness fields. It started with a first project in 1995 with SANTA RITA state and in 1997 took place a second project, LA CATALINA state, that has 1,200 has, which ones will be completed implement in November of this current year.

The 100% of the cultivated fields are irrigated with water from sweet wells, carried through our own irrigation channels and pressured in stabilized pipes without lead. Quality and sanitary controls of the staff and fields are permanently carried out.

<http://www.drokasa.com.pe/agrokasai.htm>

Honest Tea

Why do you call it Honest Tea?

- Honest Tea is made with real tea leaves, unlike most brands which use powder or syrup.
- Honest Tea is all-natural and uses organic ingredients whenever possible.
- Honest Tea is lightly sweetened, so it actually tastes like tea.
- Honest Tea seeks to create healthy and honest relationships with its suppliers, customers and the environment.

<http://honesttea.com/faq/content.html>

Cafedirect (UK)

Mission:

“To be the leading brand which strengthens the influence, income and security of producer partners in the south and links them directly to the consumer.”

www.cafedirect.co.uk

Advantage Schools, Inc.

ADVANTAGE SCHOOLS is a Boston-based company that runs 8 charter schools in 7 states. Education is conducted in a formal environment in which students wear uniforms and a "zero-tolerance" for disruptive behavior is enforced. Each school maintains a "Code of Civility" by which all students are expected to abide.

www.ibiblio.org/edweb/edref.emo.advantage.html

Tesseract School

Tesseract is a pre-school through eighth grade independent school preparing students for college now with small classes integrating technology to provide an exceptional education.

<http://tesseract.pvt.k12.mn.us/>

The Edison Project

Founded in 1992, Edison Schools is the nation's leading partner with public schools and school districts, focused on raising student achievement through its research-based school design, uniquely aligned assessment systems, interactive professional development, integrated use of technology and other proven program features. Edison students are achieving annual academic gains well above national norms.

Edison Schools Inc. now serves more than 110,000 public school students in over 20 states across the country through its whole school management partnerships with districts and charter schools; summer and after-school programs; and achievement management solutions for school systems.

www.edisonproject.com

Sun & Earth

Sun and Earth makes natural non toxic cleaning products for home and office. When it comes to cleaners you don't have to accept tradeoffs between cleaning power, safety for children and pets, your sensitive skin and the environment. With Sun and Earth, you can have it all at a fair price. Sun and Earth products are Family, Kids and Animal friendly cleaning products.

Ten years ago we started formulating cleaners for people sensitive to the harsh chemicals found in most national brands. Soon people around Philadelphia were able to buy Sun and Earth in stores. Others around the country ordered Sun and Earth by mail. Our early customers told their friends about Sun and Earth and now we are a leading brand of safe, natural, non-toxic cleaning products in the northeast.

After many years of watching advertisements claiming that petro-chemicals with mysterious names were the best way to clean house, we set out to prove that non-toxic cleaners can clean as well or better than the national brands. We know people want products made with non-toxic ingredients but they don't want to sacrifice performance. After extensive research we developed cleaners made from coconut and orange oils that clean and shine beautifully. They also have a fresh citrus scent that people rave about.

Now we're proving Sun and Earth can outperform the national brands. Consumer reporter Paul Moriarty of CBS-KYW in Philadelphia compared Sun and Earth all-purpose cleaner with Fantastik!® He showed Sun and Earth out-cleans Fantastik!®

Recently a leading consumer organization ranked all-purpose cleaners and put Sun and Earth ahead of 80% of the national brands and ahead of all other natural cleaners.

Our mission is to produce safe cleaning products with natural non-toxic ingredients and to sell them at fair prices.

<http://www.sunandearth.com/>

Wild Planet

Wild Planet makes innovative products that appeal to both parents and kids. Our products spark the imagination, promote creativity, and provide positive experience without relying on violence. We strive to treat both girls and boys with respect.

<http://www.wildplanet.com/index.php>

Shorebank Corporation

ShoreBank invests in people and their communities to create economic equity and a healthy environment.

ShoreBank undertakes this work through a number of local affiliates in Chicago, Cleveland, Michigan and the Pacific Northwest.

www.shorebankcorp.com

America Works

Shopping online has never been easier or more secure. Their online mall houses many quality merchants with unusual, different and distinctive products to offer. Find a full range of pet products and supplies, high tech gadgets, very different corporate gift ideas, a complete shop for pilots and aviators, and a home and garden shop with everything from outdoor furniture cushions to complete living room suites.

www.americaworks.net

VITAS Healthcare Corp.

VITAS is the leading provider of end-of-life care in the United States. We began providing service in South Florida in 1978. VITAS now serves more than 45,000 new patients annually.

VITAS operates 23 hospice programs in 8 states including: California, Florida, Illinois, New Jersey, Ohio, Pennsylvania, Texas, and Wisconsin.

VITAS' 5300 full-and part-time employees care for an average daily census of more than 7,000 patients. Care is provided at home, in long term care and assisted living facilities, in hospitals and in sixteen hospice inpatient units.

http://www.vitas.com/gi_vitas_story.htm

American Apparel

American Apparel is the most passionate and innovative wholesale blank T-shirt manufacturer and distributor in the world. We are committed to leveraging art, design, and technology to produce garments of the highest quality, while pioneering industry standards of social responsibility in the workplace.

<http://www.americanapparel.net/>

Forests of the World

Forests of the World (FOW) is an importer, distributor and retailer of educational products, fair trade crafts, non-timber forest and food products made by indigenous groups and from rainforests, conservation and development projects, parks, protected areas and hotspots of high biodiversity. Artisans receive an above average or living wage, benefits and healthy working conditions. FOW provides a percentage of revenue to support research on sustainable development, environmental education, nursery and reforestation projects.

www.forestsoftheworld.com

Sekem (Egypt)

The SEKEM initiative began on the main farm near Belbes, 60 km. north-east of Cairo. Biodynamic methods of agriculture have been developed, which are suited to the different Egyptian climates.

SEKEM is producing a large variety of consumer products of a high quality. SEKEM seeks to enhance and bring about a greater integration of the Arts, Religion and Sciences, by establishing and promoting institutions related to education, applied research and health care.

A holistic vision, encompassing economic, social and cultural endeavors with the main aim to develop the people, SEKEM means Vitality from the sun.

www.sekem.com

The Ethical Property Company (UK)

The Ethical Property Company is a unique initiative in ethical investment. The company buys properties and develops them as centres that bring charities, co-operatives, community and campaign groups together under one roof where they can share skills and ideas. Groups in The Ethical Property Company's centres benefit from reasonable rents, flexible tenancy terms and office space and facilities designed to meet their needs.

www.ethicalproperty.co.uk

Beacon Education Management

Beacon Education Management is a K–12, education services company based in Westborough, Massachusetts. Beacon offers contracted services to traditional public schools and charter schools. The company was founded in 1992 and now provides education management services to schools in several states.

Beacon contracts with local school boards and charter school authorities to provide comprehensive management of existing or newly created schools. In these instances, the company oversees the overall operation of the school, including personnel, curriculum and budget, under the oversight of the district or charter board.

Beacon works with school communities to develop educational programs tailored to their needs. At the core of all Beacon Schools is a foundation of solid research, the use of best practice, and school-site autonomy held to high standards of performance and conduct.

Beacon believes that every child should be given world-class educational opportunities and that every child can learn. Beacon schools nurture this belief in staff, parents, and community.

http://www.lx.org/old_site/csp/beacon.html

Traidcraft (UK)

Traidcraft has been fighting poverty through trade since 1979. They are an active community of supporters, shareholders, customers, professionals and producers committed to reducing poverty throughout the world. A Christian organization, they are committed to working with people of all faiths and none in their common fight against poverty.

www.traidcraft.co.uk

Greyston Bakery

Welcome to the delicious world of the Greyston Bakery. On our website, you will easily be able to bite into our many products, including an array of award winning cakes, tarts and other baked goods. All of us at Greyston take great pride in the quality of our work. We are fully committed to the satisfaction of our customers and we are excited to share some of the secrets to our success.

One of the main ingredients found in all of our products is our dynamic social mission. With each cake, tart and brownie we weave a concern for the community as well as for our employees. The Greyston Bakery has become a leader in community development and a role model for other socially conscious businesses.

Our success has given us the great fortune of fulfilling our social mission in a myriad of ways. Our profits support the community development work of the Greyston Foundation, which includes housing, child care, health care, a computer learning center, and more. In addition, the Bakery actively recruits and hires employees that have had difficulties finding employment in the past. Finally, we partner and serve a network of other businesses, such as Ben & Jerry's and Stonyfield Farms, who share our social concerns.

<http://www.greystonbakery.com/>

Green Dot Public Schools

Green Dot is a 501(c)(3) non-profit organization incorporated in California in 1999 to create a network of exceptional charter high schools and transform secondary education in the Los Angeles metropolitan area. Green Dot will drive substantive change in Los Angeles' high schools to help ensure that all young adults in LA receive the high school educations they deserve to prepare them for success in college, leadership and life. In carrying out its mission, Green Dot will alter the landscape of secondary education throughout California as successful reform in Los Angeles will influence major changes in other school districts throughout the State.

<http://www.greendotpublicschools.org/careers/>

Moving Solutions

Moving Solutions, based in south San Jose, provides office and industrial relocation services to Silicon Valley high technology and service companies. Moving Solutions also offers additional services, including project management, off-site storage, and residential moving/storage services. Moving Solutions is an agent for Global Van Lines, Inc. Company President Rick Philpott founded Moving Solutions in 1984, and has 26 years of experience in the moving industry. Moving Solutions employs approximately 35 low/moderate income San Jose residents. Moving Solutions offers extensive in-house training to its crews, and offers fully integrated moving and storage solutions without using outside contractors.

http://pacificcommunityventures.org/portfolio/portfolio_moving_solutions.html

Redwood Rubber LLC

Nonprofits

Council of Community Clinics (CCC)

Mission:

The mission of the Council of Community Clinics is to represent and support community health centers in their respective efforts to provide access to quality, low-cost health care services for low-income and uninsured persons.

www.ccc-sd.org

Pioneer Human Services (PHS)

Mission:

The mission of Pioneer Human services is to create opportunities for those they serve to realize personal, economic, and social development through participating in an integrated array of training, employment, housing, and rehabilitation services. The people they serve include, but are not limited to, alcoholics and other chemically dependent persons, convicts, work release participants and persons on probation and under jurisdiction of the courts.

Vision:

They are revolutionizing the way services are provided to people at risk. They create solutions to problems for people living at the margins of society. They manage and develop self-supporting enterprises and programs that provide environments for human growth and generate the resources that they need.

Their enterprises and programs model the integration of jobs, housing, training and support services essential for human development and productive community building.

Their efforts recognize all participants as associates.

www.pioneerhumanserv.com

Boomtown Café

Mission:

To make healthful, affordable food available in a safe and dignified atmosphere, while creating a community of openness and respect.

www.boomtowncafe.org

Davis Memorial Goodwill Industries

Davis Memorial Goodwill Industries is an Internal Revenue Code 501(c)(3) nonprofit workforce development organization that has provided a hand up, not a handout to tens of thousands of Washington metropolitan area residents since 1935, including disabled veterans from World War II, Korea and later conflicts.

<http://www.dcgoodwill.org/>

HousingWorks

Mission:

HousingWorks is a service designed for individuals and organizations working in the subsidized/affordable/special needs housing world.

HousingWorks was developed to help the very different groups communicate, share and distribute information more easily and efficiently: in-house, between each other and with the communities they serve.

HousingWorks aims to reduce or eliminate barriers to subsidized, affordable and special needs housing with a unique model that places state and federal oversight agencies, for-profit management companies, housing authorities, housing advocates, and the homeless in a position to render each other indispensable services.

www.housingworks.net

Rubicon Programs

Mission:

Their mission is to help people and communities build assets to achieve greater independence. Since 1973, Rubicon has built and operated affordable housing and

provided employment, job training, mental health, and other supportive services to individuals who have disabilities, are homeless, or are otherwise economically disadvantaged. Based in Richmond, California, the agency employs upwards of 300 people and offers service throughout Contra Costa County and the San Francisco Bay Area.

www.rubiconpgms.org

Recycle A Bicycle (RAB)

Recycle-a-Bicycle is an innovative, fun youth training and environmental education initiative that has taken root in New York City public schools and respected after-school youth programs.

Recycle a Bike is also a hands-on way to promote everyday bicycle use, learn bicycle mechanics, interact with positive, forward-thinking NYC youth and a good place to find that city bike you need!

<http://recycleabicycle.org>

Juma Ventures

Each fall, Juma Ventures presents the Social Enterprise Institute (SEI), a four-week practicum that provides budding social entrepreneurs access to Juma's 10 years of experience and lessons learned in the field of social enterprise. The goal of SEI is to provide attending entrepreneurs a base of knowledge that can be used as a stepping-stone for the creation and/or enhancement of businesses that incorporate strong social missions into their daily operations. Panels of experts are assembled to engage participants in conversations around business plan development, pro bono resource identification, and funding strategy formulation.

www.jumaventures.org

Gould Farm

The Gould Farm Communities (hereafter referred to as Gould Farm) comprise a psychosocial rehabilitation program that is steeped in the tradition of social service and fellowship. A compassionate, respectful family environment where people with mental illness learn to build more meaningful lives for themselves, Gould Farm provides many opportunities for "guests" to address individual goals.

Many people with psychiatric disabilities struggle in frustration on the margins of society. Gould Farm invites them into the heart of its communities. Their services remain rooted in the belief that every person has something valuable to contribute to the community regardless of their mental or emotional limitations, and they assist in developing the strengths to realize these gifts as they proceed on their road to independence.

www.gouldfarm.org

The Compass School

Mission:

The Compass School is a small learning community in which all children can excel. Their practices are developmentally appropriate, and they offer children a continuous, multiyear educational experience. An integrated, project based curriculum provides the foundation to develop each individual as a cognitive, physical, social, emotional, and reflective being. Their strength is gathered through reciprocal relationships among all members of the learning community. Students will graduate knowing they are members of a global community, having developed an awareness of and practiced their personal, social, and ecological responsibility.

www.compassschool.org

Future for Kids (F4K)

The mission of Futures for Kids is to motivate and empower students to reach their full potential by providing them, their families and educators with the nation's most comprehensive and user-friendly source of information on post-high school educational, training, and career opportunities. Our vision is that by the year 2007, Futures for Kids will be the standard by which all students in America explore the available opportunities and make conscious decisions about their future.

<http://www.futuresforkids.org/startFlash.htm>

YouthBuild USA

Mission:

YouthBuild USA's mission is to unleash the intelligence and positive energy of low-income young people to rebuild their communities and their lives.

To help build a movement toward a more just society in which respect, love, responsibility, and cooperation are available for all people in all communities to fulfill their own potential and contribute to the well-being of others.

www.youthbuild.org

Acre Family Day Care Corp.

Acre Family Day Care approaches family child care as a holistic, culturally-appropriate vehicle for economic development in low-income communities. As a not-for-profit agency, Acre helps women build sustainable home-based child care businesses through which they can earn a living wage, while at the same time providing culturally-sensitive care to the children of Greater Lowell.

<http://www.acrefamily.org/>

Aspire Public Schools

Our Vision

To enrich students' lives and reshape local public school systems

Our Mission

- To provide personalized learning experiences for California's diverse students
- To develop outstanding educators
- To catalyze change in public schools
- To share our successful practices with other forward-thinking educator

<http://www.aspirepublicschools.org/>

CFH Landscape Service

CFH Landscape services brings together one of the most successful commercial companies in the world and a model social service organization working with the homeless. It is through this partnership between The Center for the Homeless and ServiceMaster that CFH Landscape Services is able to provide complete landscape design, maintenance, and installation to customers in St. Joseph County, Indiana.

<http://www.cfh.net/programs/landscape.php>

Common Ground (NYC)

Common Ground is solving homelessness through innovative programs that transform people, building and communities.

Common Ground is focused on these goals:

- Identifying sites for additional permanent supportive housing
- Developing new programs to link subgroups of the homeless population to stable housing
- Expanding the number and involvement of employer sponsors

www.commonground.org

Benetech Initiative

The Benetech Initiative is a non-profit venture that provides social benefits by harnessing the power of technology. Benetech delivers these benefits using the new model of social entrepreneurship, which combines market forces with philanthropic capital and entrepreneurial drive. Benetech focuses the efforts of technology and technologists to solve important problems facing society.

www.benetech.org

Native Seeds

Native Seeds/SEARCH is a nonprofit conservation organization based in Tucson, Arizona. NS/S works to conserve, distribute and document the adapted and diverse varieties of agricultural seed, their wild relatives and the role these seeds play in cultures of the American Southwestern and northwest Mexico. Their mission began in 1983, springing from the nexus of cultural longing and impending loss of genetic diversity. Today they safeguard 2000 varieties of arid-land adapted agricultural crops. Some, like watermelons, were adapted from seeds brought by early Europeans. Most of their collection consists of varieties of indigenous crops developed over centuries or millennia to suit the needs of their human partners. They promote the use of these ancient crops and their wild relatives by distributing seeds to traditional communities and to gardeners world wide. Currently they offer 350 varieties from their collection, grown out at their Conservation Farm in Patagonia, Arizona. They also work to preserve knowledge about the traditional uses of the crop they steward. Through research, seed distribution and community outreach NS/S seeks to protect biodiversity and to celebrate cultural diversity. Both are essential in connecting the past to the future.

www.nativeseeds.org

Delancey Street Foundation

Delancey Street was begun in 1971 by Dr. Mimi Silbert as a residential center in San Francisco for criminal rehabilitation and vocational training. It was designed to be for ex-convicts and run by ex-convicts.

<http://www.eisenhowerfoundation.org/grassroots/DelanceyStreet.html>

Ombudsmen Educational Services

Mission:

Provide the largest and most comprehensive Internet web site pertaining to the needs, wants, and desires, of the 50+ community, their families, friends and senior providers in the Portland Metro area.

www.livingafter50.com/ombudsmanservices.html

Freedom from Hunger

Mission:

Freedom from Hunger brings innovative and sustainable self-help solutions to the fight against chronic hunger and poverty. Together with local partners, they equip families with resources they need to build futures of health, hope and dignity.

www.freefromhunger.org

SATELLIFE (US)

SATELLIFE strengthens the global health community by facilitating dialogue and disseminating relevant information on the world's most urgent health topics.

Building strong health care delivery systems in resource-poor countries requires reliable data and knowledge management tools. Policy makers, planners, program and resource managers, and health practitioners need up-to-date, relevant information to make sound decisions on a daily basis.

Their services - all free of charge -- focus on issues of particular concern in resource-poor areas of the world. Using email and the World Wide Web, SATELLIFE enables the exchange of information for decision-making through:

- Discussion groups on urgent health topics that support daily communication with colleagues
- Publications featuring current, reliable public health and clinical content
- GetWeb, a tool that enables users to obtain useful web page content via email

www.healthnet.org/

VolunteerMatch

Mission:

VolunteerMatch is dedicated to helping everyone find a great place to volunteer.

www.volunteermatch.org

HomeStart

HomeStart is Western Australia's largest facilitator for first home buyers. They have been helping low income earners and first home buyers into their own home for thirteen years.

<http://www1.homestart.net.au/index1.html>

Nation's Capital Child and Family Development (NCCFD)

Mission:

Nation's Capital Child and Family Development seeks to develop, promote and enhance quality services to children, their families and the communities in the District of Columbia.

http://www.nccfd.org/history_vision_mission_goal.htm

SmartWood (Rainforest Alliance)

SmartWood's purpose is to improve the effectiveness of sustainable forestry in conserving bio-diversity and providing equity for local communities, fair treatment to workers, and creating incentives for businesses so that they can benefit economically from responsible forestry practices.

www.smartwood.org

Golden Gate Community Inc.

Golden Gate Community, Inc. (GGCI) is an innovative nonprofit that seeks to transform the lives of at-risk youth and young adults through economic and personal growth opportunities.

Since 1981, GGCI has been addressing the economic, social, spiritual, emotional, and physical needs of the homeless in San Francisco.

Through its innovative social purpose enterprises and women's transitional home, GGCI provides employment, job training, and support for at-risk youth and young adults who are taking steps to improve their lives.

<http://www.ggci.org/website/index.html>

Triangle Residential Options for Substance Abusers (TROSA)

Mission:

To assist in changing lives and increasing law-abiding behavior by providing a self-supporting, two-year, residential, self-help community serving offenders and substance abusers at no cost to the individuals.

www.trosainc.org

Community Vocational Enterprise, Inc. (CVE)

Community Vocational Enterprises (CVE), a nonprofit organization established in 1986, creates opportunities for individuals with psychiatric disabilities to successfully reconnect with the community through innovative employment training, placement, and support services.

www.cve.org

Bidwell Vocational Training School/Bidwell Food Services

Bidwell Training Center's vision is to respond to employment markets in southwestern Pennsylvania by offering programs providing career paths and opportunities in the high-tech, culinary and medical fields. Bidwell believes that education offered in an intelligent, planned and financially sound manner will bear real results for our students and the entire community.

<http://www.bidwell-training.org/>

The Metropolitan Atlanta Council on Alcohol & Drugs

The Council on Alcohol and Drugs is a substance abuse prevention and education agency that develops programs and materials based on the most current research on drug use and its impact on community.

Since our establishment in 1969, we have served the community through high-quality services and effective prevention programs. We have an exciting range of educational programs and services designed to engage children & teens, address the needs of parents, and to provide employers, educators, health professionals, policy-makers and the media with authoritative information on tobacco, alcohol and drugs such as marijuana, cocaine, and heroin.

<http://www.macad.org/>

Homeboyz Interactive

Homeboyz Interactive was founded by Brother, Jim Holub, S. J. to discover and discuss specific ways that the Christian community can bring the peace of God to the violent world of inner city youth.

Homeboyz Interactive operates a web development business that supports digital media, software development, and network administration training programs. Their training efforts in web technology industries address the increasing gap between technological 'haves' and 'have-nots' by enabling young people who would not otherwise gain access

to computer technology to develop the awareness and skills that will help them succeed in high technology work situations.

Since 1996, 142 young people have graduated from the training programs and moved into full time IT careers.

<http://www.homeboyz.com/homeboyz-2002/flash/index-hbi2k2.php>

Girl Scouts of the USA

Girl Scouts of the USA is the world's pre-eminent organization dedicated solely to girls — all girls — where, in an accepting and nurturing environment, girls build character and skills for success in the real world. In partnership with committed adult volunteers, Girl Scouts cultivate their full individual potential. The qualities they develop in Girl Scouting — leadership, values, social conscience, and conviction about their own self-worth — serve them all their lives.

www.girlscouts.org

The Manchester Craftsmen's Guild

Mission:

A national model for education, training and hope, Manchester Craftsmen's Guild reshapes the business of social change through the arts, entrepreneurship and community partnership.

www.manchesterguild.org/home/indexFlash.html

Accion International

Mission:

The mission of ACCION International is to give people the tools they need to work their way out of poverty. By providing "micro" loans and business training to poor women and men who start their own businesses, ACCION's partner lending organizations help people work their own way up the economic ladder, with dignity and pride. With capital, people can grow their own businesses. They can earn enough to afford basics like running water, better food and schooling for their children.

In a world where three billion people live on less than \$2 a day, it is not enough to help 1,000 or even 100,000 individuals. Their goal is to bring microlending to millions of people - enough to truly change the world. They know that there will never be enough donations to do this. That's why ACCION has created an anti-poverty strategy that is permanent and self-sustaining.

www.accion.org

ApproTEC (Africa)

Mission:

ApproTEC's mission is to promote sustainable economic growth and employment creation in Kenya and other countries by developing and promoting technologies which can be used by dynamic entrepreneurs to establish and run profitable small scale enterprises.

www.approtec.org

Guate Salud (Guatamala)

GuateSalud, the popular name for the Association for the Promotion of Rural Health, is a not-for-profit, non-governmental organization formed in late-1989 to provide basic health care services to finca (farm) workers and their families in several agricultural regions of Guatemala. It offers an example of the process through which a self-supporting, employer-based managed health care organization can significantly expand the geographic coverage of its current services, and to extend and adapt its operations to include community-based services.

<http://www.jsi.com/intl/INIT/guat.htm>

Help the World See (HTWS)

Purpose:

Help The World See provides primary eye care and eyeglasses to people in developing countries.

Help the World See was founded by Dr. Wayne Cannon in 1986 and began bringing eye care to the needy through it's eyeglass recycling efforts. Used eyeglasses were collected from the public and processed into a clinically reusable form. Once sufficient glasses were available, a team of volunteer doctors and technicians would travel to a poor region to hold a temporary eye clinic. Eye examinations and eyeglasses were provided at no cost.

As the effort grew, increasing support was obtained from Lions Clubs in the area. By 1990, a separate, affiliated foundation "Lions In Sight" was formed to concentrate on eyeglass recycling.

The formation of Lions In Sight allowed Help The World See to concentrate its efforts on establishing permanent, self-financing primary care clinics.

www.sbachman.com/htws/paho.htm

The Latin American Youth Center

The Latin American Youth Center (LAYC) is a non-profit youth and family center in Washington, D.C. Founded in 1974 for the purpose of serving at-risk immigrant Latino youth, LAYC now works each year with over 5,000 infants, children, teens, and adults from the city's Latino, Vietnamese, Caribbean, African-American, and African communities. Based in Columbia Heights, LAYC attracts individuals citywide to programs in academics, health educations, job training, social services, leadership development, substance abuse prevention, housing, arts, humanities, and recreation.

www.layc-dc.org

Saiban Khuda-Ki-Basti (KKB) Project

In an attempt to reach the lowest income groups in Hyderabad, HDA launched an incremental development scheme. The scheme is based on the idea that people should settle before houses and infrastructure are constructed and that, once settled, they can develop their housing and the infrastructure incrementally, as and when they have the resources. The incremental development scheme in Hyderabad imitates the approach followed by the illegal subdividers: it is characterized by ease of entry, immediate delivery of the plot and incremental development of the houses and the infrastructure. HDA initially recruited illegal subdividers to assist the agency in the identification and settling of low income families in the incremental development scheme.

www.unesco.org/most/asia9.htm

Waste Concern (Bangladesh)

Waste Concern aims to:

- Improve the environment by promoting waste recycling activities in the country
- Conduct research, experiments on solid waste management, recycling, clinical and hazardous waste management, waste water treatment and organic farming
- Develop community-private sector-municipal partnership for improvement of urban environment
- Create job opportunity by promoting recycling of waste.

www.wasteconcern.org

Jiva (India)

They design and deploy innovative products and services, technologies and models that foster sustainable development. They also conduct capacity building courses and workshops for nonprofits to help them make the transition from an NGO to a social enterprise. To optimize their effectiveness, particularly as an enterprise mentor, they rely on leading-edge management strategies, tools and techniques. Their approach has

uniquely positioned them as a bridge between the high-end and the low-end of the social spectrum, between the developed and the emerging economies, between the big corporations and the small NGOs. Because they are focused at both the ends, they have emerged as a vital knowledge repository for bridging the existing gaps.

www.jiva.org

Kashf Foundation (Pakistan)

Kashf's mission, as expressed on its web site, is

to provide cost effective and quality microfinance services to poor women, by adding value to women's existing economic opportunities in order to enhance their role in economic and social decision-making. At the same time Kashf aims to lead to a sustained improvement in clients' incomes in order to enable them to move beyond the poverty trap.

www.kashf.com

BRAC (Bangladesh)

BRAC, formerly known as Bangladesh Rural Advancement Committee, was established as a relief and rehabilitation organization in 1972 after the Bangladesh Liberation War by Mr. Fazle Hasan Abed. Over the years BRAC has gradually evolved into a large and multifaceted development organization with the twin objectives of Alleviation of Poverty and Empowerment of the Poor.

<http://www.brac.net/>

Women's Self Employment Project

WSEP is a 501(c)(3) with the mission of assisting women make their dreams come true. WSEP is a nationally recognized leader and innovator in the field of microenterprise development and microfinance. Since 1986, WSEP has assisted over 8,000 low and moderate income increase their economic self-sufficiency and establish a sustainable livelihood for themselves and their families.

<http://www.wsep.net/WSEP.htm>

CompuMentor

We're a nonprofit organization specializing in technology assistance for community-based organizations and schools. Through our consulting practice, we offer technology planning, implementation, and support services. CompuMentor is also the home of TechSoup.org, the technology website for the nonprofit sector.

<http://www.compumentor.org/>

SEWA – Self Employed Women’s Assoc. (India)

Goals:

In their experience, poor women’s growth, development and employment occurs when they have work and income security and food security. It also occurs when they are healthy, able to access child care and have a roof over their heads. In order to ensure that they are moving in the direction of their two goals of **Full Employment** and **Self Reliance**, constant monitoring and evaluation is required. In a membership-based organization, it is the member’s priorities and needs which necessarily shapes the priorities and direction of the organization. Hence, it is appropriate that member’s themselves develop their own yardstick for evaluation. The following ten question have emerged from the members and continually serve as a guide for all members, group leaders, executive committee members and full-time organizers of SEWA. It is also useful for monitoring SEWA’s progress and the relevance of its various activities and their congruence with member’s reality and priorities. It also increases the accountability of SEWA’s leaders and organizers, to their members.

www.sewa.org

Social Firms (UK)

Social Firms UK plans to retain a small core infrastructure whose function it will be to secure resources for social firms to be managed and distributed through the regional social firm networks. This development activity will be accompanied by promotion, dissemination, and research and lobbying to improve awareness and conditions for social firms.

www.ermis.co.uk

Suruchi Foods (India)

SURUCHI FOODS a catering service, is the first endeavor by CCBT to provide jobs for the street youth of our city in association with corporate houses, NGOs, MMC and other concerned individuals for this particular case. Started on December 1995, today, it gives employment to 25 street youth and 10 riot affected ladies and is getting accepted by the society. The primary objective of the project is to provide wholesome and hygienic food to office goers.

<http://www.cozucare.org/keylinks/suruchi.shtm>

Phulki (Bangladesh)

Mission:

Although the challenges are great and the solutions depend on cooperation between government, business and civil society, Phulki's mission is to create a world where working women will not have to sacrifice their children's well-being in order to achieve economic emancipation.

Vision:

Phulki envisages a future where children can grow in an environment that is not only secure and healthy but also provides them with a proper education with which to face the future.

www.phulki.org/phulki.htm

McSense (Scotland)

McSense Group of Companies are essentially profit making (and are registered charities), with all proceeds either being ploughed back into the business or used to improve and develop community facilities. The objectives of the Group are to create long-term sustainable employment opportunities; to provide a source of employment and training for local people; to foster an entrepreneurial spirit of business enterprise; and to demonstrate the importance of taking personal and joint responsibility for the well being of the community.

<http://www.mcsence.co.uk/>

Editora Expressao Popular (Brazil)

<http://www.expressaopopular.com.br/home.html>

Jhai Foundation Internet Learning Centers (Laos)

<http://www.un.int/unitar/patit/NYtraining/2003SemI/Jhai%20Foundation.pdf>

Aspire Group (UK)

<http://society.guardian.co.uk/societyguardian/story/0,7843,501853,00.html>

Fast Track to Employment

FTE focuses on creating sustained employment for hard-to-employ persons, such as many residents in Vancouver's downtown eastside (DTES). FTE creates employment by creating a continuum of services built upon the capacity and collaboration of the existing community-based training and educational expertise and using industry-based employment relationships and partnerships. The training exists, the industry opportunities exist, and FTE connects and facilitates the components into a successful connection for individuals to employment.

<http://www.ftebusiness.org/home.cfm>

New Market Intermediates

Working Today

Working Today is a national nonprofit organization that represents the needs and concerns of America's growing independent workforce through advocacy, information and service. These independent workers—freelancers, consultants, independent contractors, temps, part-timers, contingent employees and the self-employed—currently make up about 30% of the nation's workforce.

www.workingtoday.org

TransFair

In 1992, the non-profit association TransFair first started its activities. Its aim is to support disadvantaged producers in Africa, Asia and Latin America, and to improve their working and living conditions through Fairtrade. 40 renowned organizations active in development co-operation, the church, social work, consumer protection, the co-operative system, and education are TransFair members. Being an independent initiative, TransFair itself does not trade, but concedes its label to products traded fairly and according to license agreements. Fair Trade criteria are based on the international standards of Fairtrade Labelling Organizations International (FLO). Through marketing, information and promotion activities, TransFair aims at gaining further partners and supporters for Fairtrade. At the TransFair Germany office, a total of ten people – some of them part-time – work for the realization of these aims. They are being supported by committed people from the member organizations and the 70 licensees, many honorary supporters as well as numerous committed private people. The board, elected by the meeting of members, is responsible for the realization of the political and strategic guidelines.

www.transfair.org

CEPICAFE (Peru)

Cepicafe is an association of small-scale coffee producers in northern Peru. Their 35 grassroots organizations with more than 1,400 members are located on the western slopes and the Andes mountains in Piura, which are blessed with a unique climate and ideal soils for growing coffee. The association's activities are to market coffee and represent their members.

<http://cepicafe.hypermart.net/English/cepicafei.htm>

Proarte (Nicaragua)

Proarte's purpose is to be a profitable company, offering their commercialization and exportation services in order to benefit artisans. Proarte's core objective is to help artisans export their products and thus create employment and increase incomes for them. Proarte

provides services of marketing, intermediary shipping, and other practical services which address the obstacles that prevent artisans from exporting. Products include hammocks, soapstone, calabash, ceramics and corn cob items.

<http://www.shared-interest.com/cust/proarte.htm>

Niagara Presents (Canada)

Niagara Presents is a community based network that provides co-operative product development, marketing and distribution support to independent Niagara-based growers and processors of speciality foods.

<http://www.niagarapresents.net/>

Equal Exchange (Latin America)

“To build long-term trade partnerships that are economically just and environmentally sound, to foster mutually beneficial relations between farmers and consumers and to demonstrate through their success the viability of worker-owned cooperatives and fair trade.”

www.equalexchange.com

Crecer (Central America, Mexico & the Caribbean)

<http://www.crecer.org.bo/>

Cauqueva (Argentina)

The valley known as the Quebrada de Humahuaca in the north of Argentina comprises three departments of the province of Jujuy (Tumbaya, Tilcara and Humahuaca), as well as a fourth in the province of Salta (Iruya). It covers more than 150,000 hectares and is populated by about 2,300 families, mainly small farmers of indigenous origin.

This is a different Argentina, one of stone and fine air, where the landscapes look like the handiwork of a bunch of half lazy, half crazy set designers. Its skies are compact and without depth and its mountains have the most unexpected colors - red, violet and yellow. This is where Cauqueva - *Cooperativa Agropecuaria y Artesanal Union Quebrada y Valles* (Agricultural and Artisan Cooperative Union of the Quebrada and Valleys) - was born in 1996. The event was at once a point of arrival and a point of departure. As one set of activities, directed by the agronomist Javier Rodríguez, who had come to the Quebrada a few years earlier, was coming to a close, so one of the most interesting examples of agricultural cooperation in the country was just getting under way.

This is an Argentina you don't expect to see at the start of your journey, when, like the Montalbán character Pepe Carvalho, you distractedly associate the country with the familiar trio: 'Tango, Maradona and *desaparecidos*'.

http://www.slowfood.it/ita/premio/inglese/Argentina_02.html

EcoTrust

Ecotrust was created in 1991 by a small group of diverse people who sought to bring some of the good ideas emerging around sustainability back to the rain forests of home. We set out to [characterize this region](#) and [articulate a more enduring strategy](#) for its prosperity.

These efforts are predicated on the notion, gaining an ever wider currency, that economic and ecological systems are mutually interdependent. To this relationship Ecotrust and others have sought to add a third "e" - social equity - to ensure that economic development awards benefits to all the region's citizens. Economy, ecology, equity: the triple bottom line.

<http://www.ecotrust.org/>

Traidcraft

Traidcraft is a public limited company which seeks to promote fairness in world trade. The company buys goods from Third World countries at realistic prices ensuring that those who produce the goods get fairly paid. In this way, when we buy goods from Traidcraft we are working together with the producers for a better future for poor communities.

Traidcraft goods, craft goods and clothes, paper and dry foods are sold by catalogue or through representatives in the community. In Dunblane the Council of Churches has a stall which sells goods from 10.00am until 12 noon every Saturday in the Cockburn Coffee Lounge of Dunblane Cathedral Halls. It is operated by a group of volunteers.

<http://www.dunblanecathedral.org.uk/traidcraft.htm>

Fairtrade Foundation

The Fairtrade Foundation exists to ensure a better deal for marginalised and disadvantaged third world producers.

<http://www.fairtrade.org.uk/>

Strategic/Effective Philanthropy

General Overview

Strategic/Effective Philanthropy

General Overview

Information Resource (Books, Articles, Websites)

Council on Foundations Publications

The Council on Foundations is a membership organization of more than 2,000 grantmaking foundations and giving programs worldwide. They provide leadership expertise, legal services and networking opportunities—among other services—to their members and to the general public.

www.cof.org

Philanthropy News Digest

<http://fdncenter.org/pnd/index.jhtml;jsessionid=CDG1Q2HW23Y4KP5QALRSGXD5AAAC12F>

Venture Philanthropy Partners.org website

Venture Philanthropy Partners (VPP), a philanthropic investment organization, is working to improve the lives of children from low-income communities by pursuing two interrelated goals. First, we help strengthen nonprofit organizations, offering not just major funding but also significant management expertise and other non-financial resources that are too rarely available to nonprofits. Second, we are joining with others in our field to inspire philanthropists, corporate and nonprofit leaders, and public policymakers to help increase the effectiveness and the flow of capital, talent, and other resources to nonprofit organizations meeting the core needs of children.

<http://venturephilanthropypartners.org/>

McKinsey & Co./VPP Report on Effective Capacity Building

Effective Capacity Building in Nonprofit Organizations brings some common language to the discussion of capacity building and offers insights and examples of how nonprofits have pursued building up their organizational muscle. The report contributes to the growing national conversation about how to help nonprofits become stronger, more sustainable, and better able to serve their communities. McKinsey & Company prepared the study at the request of VPP. McKinsey also developed a practical assessment tool for this report that nonprofits can use to measure their own organizational capacity. We hope that nonprofits and funders alike find value in this report.

<http://venturephilanthropypartners.org/learning/reports/capacity/capacity.html>

Morino Institute/VPP Venture Philanthropy Reports by CWV

Venture Philanthropy 2002: Advancing Nonprofit Performance Through High-Engagement Grantmaking is Venture Philanthropy Partners' third annual report on this emerging field. Prepared for VPP by Community Wealth Ventures, the report is a useful resource for those working in venture philanthropy and other forms of high-engagement grantmaking as well as those interested in learning more about the field. The report emphasizes valuable lessons learned and features a series of essays from funders, recipients, and leaders in the field. It also includes comprehensive profiles of 50 national and international organizations involved in high-engagement grantmaking, as well as a detailed analysis of survey data tracking trends in the field.

<http://venturephilanthropypartners.org/learning/reports/report2002/report2002.html>

Guidestar

Connecting people with nonprofit information since 1994, GuideStar offers basic, in-depth, and customized data services.

<http://www.guidestar.org/>

“Philanthropy Measures Up” report by Global Leaders for Tomorrow (World Economic Forum)

Benchmarking Philanthropy Task Force

The Task Force on Benchmarking Philanthropy aims to address a critical issue faced by all donors and non-governmental organizations (NGOs): how to measure the effectiveness of Philanthropy. In recent years there has been a dramatic increase in concern about the effectiveness of philanthropy and the tangible impact of non-profit organizations. Non-profit publications, academic and trade journals and even mainstream media reveal a generalized fixation on results.

The task force produced *Philanthropy Measures Up*, an 85-page report which looks at the leading 20 initiatives in this area. The goal of this report is to provide a collaborative framework for world leaders to work together to:
increase the amount and impact of philanthropy around the world through the development of systems that increase philanthropy's effectiveness
reduce transaction costs for donors and NGOs alike.

As a result, *Philanthropy Measures Up*:
provides an overview of the key systems and developments in the field of measuring philanthropic effectiveness;
demonstrates the practical application of several systems to real life grantees;
provides a matrix summary of the benefits and best uses of key systems for measuring effectiveness;

provides practical ideas for donors as well as best practices in the area to help donors and NGOs alike make their systems more effective.

<http://www.weforum.org/pdf/GLT/Philanthropy.pdf>

Philanthropy Capacity Building Resources Database (Human Interaction Research Institute)

The PCBR database contains 228 descriptions of capacity-building programs being carried out by various types of U.S. foundations. From this database, you may request a profile of any program, conduct searches according to geography or type of capacity-building work, and more.

The PCBR Database is intended to be a free-standing information and referral resource. As part of its ongoing work on nonprofit capacity building and philanthropy, the Human Interaction Research Institute welcomes inquiries from funders needing specialized information or technical assistance on capacity building, from planners of educational or conference activities seeking a speaker, or from research colleagues.

www.humaninteract.org/pcbrdatabase.htm

“Moving Ideas and Money: Issues in Funder Collaboration” by R. Hamilton (TFN)

This paper was written by Ralph Hamilton and intended to inform the Funders' Network for Smart Growth and Livable Communities (TFN) about issues in and approaches to funder funding collaboration. Rather than a comprehensive survey, the paper presents a first level of analysis of funding collaboration, reports general findings from a diverse sample of experienced collaborators, and frames tensions funders face when choosing a collaborative approach. The final section suggests both cautions about funder collaboration, as well as opportunities that funder collaboration offers philanthropy.

http://www.fundersnetwork.org/info-url_nocat2778/info-url_nocat_list.htm?attrib_id=5820

Worldwide Initiative for Grantmaker Support (WINGS) website

Worldwide Initiatives for Grantmaker Support (WINGS) is a global network of around 100 membership associations serving grantmakers and support organizations serving philanthropy, which have joined together to:

- create opportunities to learn from and support one another
- develop modes of communication and collaboration
- contribute to the strengthening of philanthropy worldwide

www.wingsweb.org

“Discovering Philanthropy in the 21st Century” by K. Fulton & A. Blau (GBN)

The following is a part of GBN’s evolving work on the future of philanthropy. This section describes some forces in philanthropy today that we believe are shaping the experience of leaders and practitioners throughout the field. It introduces a set of broad themes that, we believe, ought to be considered by any individual funder or philanthropic organization interested in strengthening strategies and improving effectiveness.

http://www.wfnet.org/news/story.php?story_id=179

“The Changing Funding Environment for community Based Organization” by McKinsey/VPP

On Tuesday, June 3, 2003, McKinsey & Company facilitated a workshop for Venture Philanthropy Partners (VPP) to explore the "Implications of the Changing Funding Environment for Community-Based Nonprofits Serving Children of Low-Income Families." Eighteen participants from, or with past experience of, a variety of sectors—including federal and state government, community-based nonprofits, foundations, nonprofit and philanthropic affinity groups, high net-worth donors, public policy, and high-engagement philanthropic organizations—provided insight into the challenges and opportunities of this changing environment.

<http://venturephilanthropypartners.org/learning/perspectives/workshop/index.html>

Global Philanthropy & Foundation Building Website (Synergos Institute)

The Global Philanthropy & Foundation Building website is part of Synergos' efforts to strengthen the institutional and financial capacity of grantmaking foundations and other private social investment organizations to support local efforts to reduce poverty, increase equity and advance social justice. Synergos provides an array of capacity-building services to over 400 foundations, philanthropic support organizations and social investment groups in nine countries in Southern Africa, Southeast Asia and Latin America, and more limited services globally.

<http://www.synergos.org/globalphilanthropy/>

“Where Money Meets Mission: Breaking Down the Firewall Between Foundation Investments and Programming” by J. Emerson

Foundations must bridge the "investment gap" – the huge chasm between what they invest in pursuit of economic growth and what they invest in pursuit of mission. A few have already started blazing the path, maximizing total returns by putting their money where their mission is.

<http://www.gsb.stanford.edu/ssir/Summer2003/EMERSON.pdf>

Grantcraft.org Website

GrantCraft began at the Ford Foundation, with a kernel of case studies and examples that had long served as orientation materials for new program officers. From there, starting in October 2001, we've sought out hundreds of grant makers and grantees from other organizations to add examples and insights of their own, share successes and disappointments, and draw lessons from what they've done and observed. A team of consultants and writers has organized this information into a variety of formats designed for self-study or workshops -- all aimed at helping grant makers work more effectively in whatever field or community they support.

www.grantcraft.org/

BBB Wise Giving Alliance

The BBB Wise Giving Alliance collects and distributes information on hundreds of nonprofit organizations that solicit nationally or have national or international program services. It routinely asks such organizations for information about their programs, governance, fund raising practices, and finances when the charities have been the subject of inquiries.

www.give.org

Philanthropy Information Retrieval Project Newsletter

Aspen Institute takes over production of Philanthropy Information Retrieval Project

The Aspen Institute's Nonprofit Sector and Philanthropy Program has announced that it will take over publishing the Philanthropy Information Retrieval Project (PIRP), which was established in 1996 with funding from the John D. and Catherine T. MacArthur Foundation. PIRP provides monthly summaries of new and emerging issues that may affect foundations. To subscribe, send an email to philanthropy@aspeninstitute.org with "subscribe" in the subject line.

<http://www.synergos.org/globalgivingmatters/briefs/0305resources.htm>

<http://www.nonprofitresearch.org/newsletter1531/newsletter.htm>

Social Capital Partners Website (Canada)

Mission:

Social Capital Partners will invest in and incubate revenue generating social enterprises that employ at-risk youth and other populations outside the economic mainstream in Canada.

The goal of these social enterprises will be to acquire scale, to eventually exist without external funding, and to create improved social outcomes and financial self-sufficiency for the populations they employ.

SCP will be a catalyst for encouraging other creative approaches in the sector aimed at improving social outcomes through the use of innovative funding mechanisms.

www.socialcapitalpartners.ca

Philanthropy UK Newsletter

The project brief is to promote new philanthropy, including encouraging the creation of new foundations, in various ways:

- Providing a first point of contact for people who may be able to commit substantial resources, helping them to explore strategies and options
- Researching and documenting the motivation and concerns of donors of significant wealth, leading to a significant publication on this theme
- Providing a second stage of advice to help potential donors draw on the experience of existing philanthropists and philanthropic organizations (matched according to location, occupation, or cultural and ethnic background)
- Providing hard practical information and advice on legal and structural options, tax relief mechanisms, and model governing instruments
- Engaging professional advisers in encouraging philanthropy among suitable clients
- Collecting and publicizing relevant statistics, fostering positive articles in the media, promoting further developments in the tax framework as necessary
- Engaging in public and private discussions, and forging appropriate working links with government and with broader campaigns on charitable giving
- Establishing a 'connective network' among organizations active in promoting philanthropy and foundations, thus facilitating sharing of good practice, experience, literature (especially from other countries), and cross-referral of potential donors

www.philanthropyuk.org/newsletters.asp

The Philanthropy Atlas (UK)

The Institute for Philanthropy is a non-profit making organization which was set up in 2000 to develop a greater understanding of philanthropy and its place in modern society, and ultimately to allow philanthropy to thrive by:

- promoting research into the incentives and barriers to giving;
- devising improved methods for increasing giving;
- ensuring that the maximum benefit reaches the ultimate cause.

www.instituteforphilanthropy.org.uk/atlas.html

Alliance Magazine (UK)

This quarterly magazine examines issues relevant to people working to strengthen civil society across the world. The magazine reaches 4,000 professionals working in funding institutions, international NGOs, companies, governments, and other civil society organisations. The purpose of the publication is to provide a forum for discussion and communication between members of the international funding community, to further understanding of the challenges they face, and to stimulate new thinking on how these challenges can be addressed.

<http://www.comminit.com/ma2003/sld-7764.html>
<http://www.allavida.org/alliance/alliancehome.html>

“The Competitive Advantage of Corporate Philanthropy” HBR article by M. Porter & M. Kramer

Porter, Michael E., Mark. R. Kramer. The Competitive Advantage of Corporate Philanthropy. Harvard Business Review OnPoint, 2002.

www.nhcc-hq.org/documents/philanthropy.pdf

Global Giving Matters

Global Giving Matters is a newsletter on best practices and innovations in individual and family philanthropy and social investment. It is produced jointly by Synergos and the World Economic Forum (WEF) for members of WEF and the Global Philanthropists Circle (GPC). GPC member Adele Simmons, a leading advocate of global philanthropy and member of Synergos' Board of Directors, serves as Senior Advisor to the WEF and joins me in providing editorial guidance for this newsletter. Myra Alperson is Consulting Editor. Rockefeller Philanthropy Advisors provides support for its distribution.

www.synergos.org/globalgivingmatters/

Venturephilanthropy guide.org

VenturePhilanthropyGuide.org is a navigational map which charts the Who, What, Why, When and Where to the world of venture philanthropy.

A web search for "venture philanthropy" results in thousands of returns. The aim of this site is to provide an easily navigable map of the sometimes uncharted and confusing landscape of venture philanthropy, strategic philanthropy and, in part, its close ally social entrepreneurship. Hopefully, along the way of their journey they can help to build a bridge between the two worlds of traditional and venture philanthropy.

www.venturephilanthropyguide.org

Changemakers.net Website

Changemakers is an initiative of Ashoka: Innovators for the Public that focuses on the rapidly growing world of social entrepreneurship. Its mission is to provide inspiration, resources, and opportunities for those interested in social change throughout the world.

www.changemakers.net

“Agile Philanthropy: Understanding Foundation Effectiveness” by J. Orosz, C. Phillips & L W Knowlton

Orosz, Joel J., Cynthia C. Phillips, Lisa Wyatt Knowlton. Agile Philanthropy: Understanding Foundation Effectiveness. Grand Valley State University, 2003.

www.nonprofitbasics.org/PDF/Article7.PDF

INSP – Theory of Change Tool

INSP (ed.): INSP Theory of Change Development Tool

This software was designed for use by organizations such as Foundations, Trustees, NGOs, and individuals such as donors, philanthropists or consultants to facilitate the development of a Theory of Change, the first step in strategic philanthropy. Working through this Tool and creating a Theory of Change allows organizations to be more strategic by identifying up-front the boundaries of their work – the population, the strategies and the desired outcomes.

www.insp.efc.be/frameset.php?display=show.php&d=65

The Global Philanthropy and Foundation Building Website (Synergos Institute)

The Global Philanthropy & Foundation Building website is part of [The Synergos Institute](http://www.synergos.org)'s efforts to strengthen the institutional and financial capacity of grantmaking foundations and other private social investment organizations to support local efforts to reduce poverty, increase equity and advance social justice.

<http://www.synergos.org/globalphilanthropy/>

Resource Organizations

Hauser Center for Non-profit Organizations (Harvard)

Mission:

The Hauser Center for Nonprofit Organizations seeks to expand understanding and accelerate critical thinking about civil society among scholars, practitioners, policy makers and the general public, by encouraging scholarship, developing curriculum, fostering mutual learning between academics and practitioners, and shaping policies that enhance the sector and its role in society.

The Hauser Center was launched in April 1997 with a generous gift from Rita and Gustave Hauser. The Center is an interdisciplinary research center at Harvard University based at the John F. Kennedy School of Government.

www.ksg.harvard.edu/hauser/

Independent Sector

Vision:

A just and inclusive society of active citizens, vibrant communities, effective institutions, and a healthy democracy.

Mission:

To promote, strengthen, and advance the nonprofit and philanthropic community to foster private initiative for the public good.

www.independentsector.org/about/about-is.htm

Center for Effective Philanthropy

Mission:

The mission of the Center for Effective Philanthropy is to advance the practice of philanthropy by providing management and governance tools needed to define, assess, and improve overall foundation performance.

This mission is based on a vision of a world in which pressing social needs are more effectively addressed. It stems from a belief that improved performance of funders, and in particular foundations, can have a profoundly positive impact on non-profit organizations and those they serve.

www.effectivephilanthropy.org

Grantmakers for Effective Organizations (GEO)

Grantmakers for Effective Organizations is dedicated to promoting learning and encouraging dialogue among funders committed to building strong and effective nonprofit organizations. GEO's mission is to advance and expand organizational effectiveness practices in and by the philanthropy community. GEO does this by

- Commissioning and contributing to research,
- Developing programs and products, and
- Building a community of practice that expands the resources available on nonprofit effectiveness.

Currently, GEO has more than 600 individual members representing more than 400 grantmaking organizations.

www.geofunders.org

UCLA Corporate, Foundation and Research Relations

The UCLA office of Corporate, Foundation and Research Relations (CFR2) serves as a catalyst for promoting and strengthening relationships between corporations and foundations and the UCLA community. The office represents the broad priorities of the academic units and the overall campus to the corporate and foundation community, promoting opportunities for interaction to enhance research, philanthropy, recruiting, marketing and other initiatives.

<http://cfr.support.ucla.edu/>

Council on Foundations

The Council on Foundations is a membership organization of more than 2,000 grantmaking foundations and giving programs worldwide. They provide leadership expertise, legal services and networking opportunities—among other services—to their members and to the general public.

www.cof.org

Center for the Study of Philanthropy and Voluntarism (Duke Univ.)

Whether or not they are grouped together as a "sector" of the economy, classified as a mode of behavior or studied as an orientation towards life, philanthropy and voluntary organizations constitute important phenomena that are worth serious attention. Duke University's Center for the Study of Philanthropy and Voluntarism was created in 1986 in order to provide such serious attention. It is housed within the Terry Sanford Institute of Public Policy, an academic unit of the university that has an interdisciplinary research program and offers a professional master's degree in public policy analysis and

management as well as an undergraduate major in public policy. The Center has three major objectives: to support scholarly research on issues related to philanthropy and voluntarism, to stimulate the exchange of ideas and research findings among scholars and practitioners, and to encourage the development of university courses in the area of philanthropy.

www.pubpol.duke.edu/centers/philvol/

New Philanthropy Capital (UK)

New Philanthropy Capital is a registered charity, established in 2001 by a group of leading figures from the UK's financial community. NPC is driven by a mission to improve the efficiency and effectiveness of charities, both in the UK and internationally. Our work is underpinned by research-based analysis and guidance that sheds light on the scale and nature of the need for charitable services, on the delivery options and the outcomes that can be achieved.

<http://www.philanthropycapital.org/index.html>

National Network of Grantmakers

The National Network of Grantmakers (NNG) is an organization of individuals involved in funding social and economic justice, not a funding group. NNG is committed to the goal of increasing resources, financial and otherwise, to organizations working for social change. Our members are individual donors, foundation staff, board, and grantmaking committee members. Founded in 1980, NNG provides services to both funders and practitioners or grantseekers.

<http://www.nng.org/>

The Funders Network for Smart Growth and Livable Cities (TFN)

The Funders' Network is an active resource and focal point for foundations, nonprofit organizations and other partners working to solve the environmental, social, and economic problems created by suburban sprawl and urban disinvestment. It informs funders of critical policy and grassroots developments; enables program staff to share effective strategies and tools; builds the capacity of key constituencies to promote smart growth and livable communities; and raises awareness about the interdisciplinary nature of these issues and the need for sustained engagement by a diverse coalition of funders.

<http://www.fundersnetwork.org/>

Philanthropy Australia, Inc. (Australia)

Philanthropy Australia is the national membership body for the philanthropic sector. It promotes and protects the interests of family, private, corporate and community giving within Australia.

Philanthropy Australia works to improve public understanding and recognition of the relationship between philanthropy and the wellbeing of the community. Advocacy is a key task of Philanthropy Australia. One of the major advocacy tasks relates to Taxation Reform.

Established more than 25 years ago as the Association of Australian Philanthropic Trusts (later the Australian Association of Philanthropy), Philanthropy Australia was incorporated in 1988 and has had a full-time secretariat since 1995.

www.philanthropy.org.au

Social Venturing Foundation (The Netherlands)

The Foundation brings together people, knowledge and money to help supporting venturing projects. The aim of the Social Venturing Foundation is to bring together people, knowledge and money to let ICT bridge the divide by venturing into Assisting Technologies, New Employment and Digital Care all over the world.

<http://www.socialventuring.net/>

The Philanthropy Workshop and the Philanthropy Workshop West

The mission of The Philanthropy Workshop West (TPW West) is to create an active, global association of strategic philanthropists with the skills, commitment and imagination to make a significant contribution to the pressing issues of their time. TPW West consists of four quarterly workshops, offered over the course of a year, that provide opportunities for leadership, lifelong learning and collaborative problem solving. TPW West values an approach to philanthropy based on intellect, humility, creativity and the courage needed to foster social innovation.

www.tpwwest.org

Institute for Philanthropy (UK)

The Institute for Philanthropy is a non-profit making organization which was set up in 2000 to develop a greater understanding of philanthropy and its place in modern society, and ultimately to allow philanthropy to thrive by:

- promoting research into the incentives and barriers to giving;
- devising improved methods for increasing giving;
- ensuring that the maximum benefit reaches the ultimate cause.

www.instituteforphilanthropy.org.uk/

Indiana University Center of Philanthropy

These are exciting and energizing times for the Center on Philanthropy. Through innovative leadership and collaboration with our colleagues, the Center is making important contributions to increase the understanding of philanthropy and improve its practice.

www.philanthropy.iupui.edu

Center for Venture Philanthropy (CVP)

The CVP was launched in 1999, to create an environment where community donors could collaborate and drive positive change in their communities. Using a venture capital model, investors base "social venture funding" on results-oriented business plans. Investors work directly with the CVP staff and nonprofit leaders to understand community and nonprofit issues, problem-solve, and structure their investments. The CVP's first Social Venture Fund, the Assets for All Alliance, has won national recognition for its anti-poverty efforts and leads the country in terms of documented results. The Raising A Reader™ venture fund, which provides take-home book bags and children's books to encourage early literacy, continues to expand its local and national outreach, garnering praise from child development experts.

www.pcf.org/venture_philanthropy/about.html

Social Enterprise Alliance

Vision:

Strong, self-sustaining nonprofits lead positive social change

Mission:

To build stronger, more effective nonprofit organizations by mobilizing a community of practitioners and investors to advance earned income strategies.

Social Enterprise Alliance is a network of support connecting entrepreneurial nonprofits with learning opportunities, technical assistance and resources to further their efforts.

www.se-alliance.org

American Association of Fundraising Counsel (AAFRC)

The founding firms of the American Association of Fundraising Counsel sought to enhance the professionalism of a field that was disorganized and sometimes misunderstood and mistrusted. Their first act was to develop a fair practice code. The code, known today as the Standards of Practice and Professional Code of Ethics, is widely accepted as a model for professional ethics in the field.

Beyond this original mission to promote the evolution of the professional fundraising field, the Association's other commitment—promoting philanthropy—has also expanded through the years. Giving USA was first published as a public service in 1955.

www.aafrc.org

European Foundation Centre

Vision:

A community of informed, inspired, committed, independent funders engaged in seeking solutions to challenges facing humanity in Europe and Internationally.

Mission:

The European Foundation Centre (EFC) is a knowledge-based membership association dedicated to strengthening organized philanthropy, which is embedded in and supports civil society, in Europe and Internationally. The EFC helps nurture efforts aimed at supporting independent, accountable and sustainable funders throughout the New Europe, particularly when this fundamental human right to associate private capital for public benefit needs fostering.

www.efc.be

Canadian Centre for Philanthropy

The Canadian Centre for Philanthropy is a membership-based organization that works with charities, governments and corporations to advance the role and interests of the charitable sector for the benefit of Canadian communities.

The Centre collects and disseminates information, generates research and publications, advocates for an improved regulatory environment, and acts as a catalyst for partnerships between the voluntary and corporate sectors.

www.ccp.ca

www.wingsweb.org/network/profiles/CCP.html

Asia-Pacific Centre for Philanthropy & Social Investment (Swinburne Univ.)

The Centre offers consultancy and professional development services to the corporate sector and to private clients.

The Asia-Pacific Centre for Philanthropy and Social Investment is to have an active reach into the Asia-Pacific, using distance education, on-line teaching and on-site programs.

www.swinburnephilanthropy.net/homemain.htm

Social Venture Partners

Social Venture Partners was the inspiration of former Aldus Corporation President Paul Brainerd. Additional founding members include technology industry leaders Scott Oki, Ida Cole, Bill Neukom and Doug and Maggie Walker. The vision of the founders was to build a philanthropic organization using a venture capital model, where Partners actively nurture their financial investments with guidance and resources.

<http://www.svpseattle.org/>

Social Ventures Australia

Social Ventures Australia aims to source innovative solutions to many of Australian society's entrenched community problems.

They aspire to becoming the focal point for the mentoring, nurturing and financing of Australian-based social ventures.

Established in 2002, SVA is the result of the pooled resources of The AMP Foundation, The Benevolent Society, The Smith Family and WorkVentures.

<http://www.socialventures.com.au/home.asp>.

Synergos Institute Global Philanthropists Circle

The Global Philanthropists Circle is built around a series of activities and services that can be tailored to the needs and time availability of each membership. Intergenerational family groupings, couples, or individuals are welcome to participate under a single membership. Synergos recognizes the importance and interest of successor generations in becoming effective social investors and philanthropists.

www.synergos.org/philanthropistscircle

Association of Foundations (Philippines)

The Association of Foundations is a network that exists to improve the capacities of its member foundations to deliver innovative, quality programs for Philippine development, consistent with the highest professional and ethical standards.

Through the Philippine Foundation Center, AF provides relevant information, training, consultancy and technical services based on foundation best practices and emerging technologies. AF matches resources and builds on its members' strengths to enrich their competencies.

With local and global partner institutions, AF works to improve the legal and enabling environment for Philippine philanthropy and foundation development.

<http://www.afonline.org/>

Educational Foundation of America

Mission:

The Educational Foundation of America (EFA) exists to improve individual lives and their surroundings through education and awareness, in hopes of bettering humanity and the world they inhabit.

www.efaw.org

Emerging Practitioners In Philanthropy (EPIP)

www.synergos.org/03/philanthropology101.pdf

Association of Charitable Foundation (UK)

ACF receives no government funds. It is entirely dependent on its members, who pay a subscription according to size; for most, this is no more than one thousandth of their grant-giving in the previous year. Over 300 independent trusts and foundations, large and small, have joined - with total grant-giving of more than £1 billion per year.

www.acf.org.uk

Association of Small Foundations

About ASF

Foundations with few or no staff provide half of the total foundation funding in the U.S., giving essential financial support to hospitals, libraries, youth programs, senior programs, education, historic preservation, the arts, social services, and other important activities in thousands of communities across the country. While these foundations meet a critical need in our communities, it became clear that many of their needs were unmet in the larger philanthropic community. They wanted a network and a community to help them be as effective as possible.

The Association of Small Foundations was created out of this need. ASF is committed to building and strengthening small foundation philanthropy by providing top quality, timely, practical, member-driven programs to all foundations with few or no staff.

<http://smallfoundations.org/>

National Committee for Responsive Philanthropy (NCRP)

Founded in 1976, the National Committee for Responsive Philanthropy is dedicated to helping the philanthropic community advance the traditional values of social and economic justice for all Americans. Committed to helping funders more effectively serve the most disadvantaged Americans, NCRP is a national watchdog, research and advocacy organization that promotes public accountability and accessibility among foundations, corporate grantmakers, individual donors and workplace giving programs.

<http://www.ncrp.org/>

Dorethy A. Johnson Center for Philanthropy and Nonprofit Leadership at Grand Valley State University

Mission:

Their mission is to promote effective philanthropy, community improvement, and excellence in nonprofit leadership.

The Johnson Center encourages an understanding of the historical roots and contemporary practice of philanthropy within the university and throughout the community by focusing financial, technical and administrative support on three goals of teaching, research and service.

www.gvsu.edu/philanthropy

Consultants

Abt Associates

The employee-owners of Abt Associates Inc. are committed to performing research and consulting that improves the quality of life and economic well being of peoples worldwide.

They devote their energy and creativity to help governments, businesses, and private organizations make better decisions and deliver more-effective products and services. Whether policy or profit driven, their clients turn to them for the integrity of their methods and findings, the objectivity of their thinking, and the practical utility of their results.

They are an employee-owned company, committed to sustained financial health and increased shareholder value. They provide a continuous learning environment and are committed to hiring and retaining a diverse staff with the highest quality technical, management, and entrepreneurial talents. They provide staff with a quality of work life characterized by creativity, high performance, and mutual respect.

www.abtassoc.com

The Bridgespan Group

Mission:

Like the nonprofit organizations and foundations they serve, the Bridgespan Group is committed to making a difference in the world. They are a not-for-profit consulting firm exclusively focused on the distinctive challenges facing nonprofit organizations. Their close strategic partnership with Bain & Company uniquely positions them to be a bridge between nonprofit organizations and the leading-edge management strategies; tools and talent that can help them achieve greater social impact. Their work is highly customized, addressing each organization's real-world challenges. Their mission—their passion—is to help nonprofit organizations achieve their desired results.

Their desire to make an impact extends beyond clients of the Bridgespan Group. They are also devoted to sharing what they learn with the broader nonprofit community, to help other organizations **pursue their own missions more effectively.**

www.bridgespangroup.org/BSGweb/default.asp

Center for Effective Philanthropy

Mission:

The mission of the Center for Effective Philanthropy is to advance the practice of philanthropy by providing management and governance tools needed to define, assess, and improve overall foundation performance.

This mission is based on a vision of a world in which pressing social needs are more effectively addressed. It stems from a belief that improved performance of funders, and in particular foundations, can have a profoundly positive impact on non-profit organizations and those they serve.

www.effectivephilanthropy.org

Community Wealth Ventures

Vision:

The sector will have the resources it needs to sustain effective social solutions.

Mission:

To build community wealth by helping nonprofit clients develop earned income strategies and for profit clients strategically connect business and philanthropic objectives.

www.communitywealth.org

Foundation Strategy Group

Their goal is to help foundations attain greater impact and organizational effectiveness. They tailor their services to meet the unique requirements of each client—and they keep their work strictly confidential.

www.foundationstrategy.com

McKinsey & Co. Nonprofits Practice

McKinsey & Company has helped nonprofit leaders understand and respond to their most critical challenges for more than 75 years. Throughout that time, they've placed great importance on making a positive impact in the communities they serve through work for nonprofit and public sector clients. Last year, they served more than 200 nonprofit, public sector, and philanthropic organizations with full-time teams. In addition, more than half of their partners in North America are on the boards of at least one nonprofit.

McKinsey is equally committed to serving the broader nonprofit community through the development and dissemination of innovative ideas directly into the sector. Through ongoing publications, event presentations, and this website, they deliver McKinsey's distinctive knowledge to those organizations they will not have the opportunity to serve.

www.mckinsey.co.th/practices/nonprofit/

New Philanthropy Capital (UK)

The Institute for Philanthropy is a non-profit making organization which was set up in 2000 to develop a greater understanding of philanthropy and its place in modern society, and ultimately to allow philanthropy to thrive by:

promoting research into the incentives and barriers to giving;

- Devising improved methods for increasing giving;
- Ensuring that the maximum benefit reaches the ultimate cause.

www.instituteforphilanthropy.org.uk/in10.html

Rockefeller Philanthropy Advisors

The mission of the Rockefeller Philanthropy Advisors is to help donors create thoughtful, effective philanthropy throughout the world.

www.rockpa.org/index.html

The Philanthropic Initiative

The Philanthropic Initiative, Inc.

is a non-profit philanthropic consulting firm founded in 1989 to help donors increase the impact of their philanthropy. Over the years, TPI has gained considerable experience in designing, implementing and evaluating a wide range of philanthropic programs and grants initiatives on behalf of individual donors, families, foundations and corporations. Our commitment is to help our clients identify their philanthropic interests and passions and to create strategic approaches that make important differences in society.

<http://www.tpi.org/>

TCC Group

TCC Group (formerly The Conservation Company) is a consulting firm that develops strategies and programs that enhance the efficiency and effectiveness of nonprofit organizations, philanthropies and corporate citizenship programs to achieve social impact.

<http://www.consco.com/>

Initiatives

The Foundation Incubator, Capacity Building Venture Fund

Similar to a small business incubator, The Foundation Incubator provides shared facilities, mentoring, and networking opportunities to its Affiliated Members so they can

be more effective in their grantmaking. Affiliates can access these facilities and services whether or not they choose to locate their offices at TFI.

TFI's doors are open to family, independent, corporate, and public foundations of all sizes and interests. TFI also welcomes satellite offices of mature foundation, affiliated philanthropic organizations, and academic fellows, making it a rich and diverse environment for collaboration.

www.foundationincubator.org

Three Sector Initiative

Vision:

A just and inclusive society of active citizens, vibrant communities, effective institutions, and a healthy democracy.

Mission:

To promote, strengthen, and advance the nonprofit and philanthropic community to foster private initiative for the public good.

www.independentsector.org/programs/leadership/3Sector_Overview.html

Initiative on Indigenous Philanthropy (Aga Kahn Foundation)

For over two years, the Initiative on Indigenous Philanthropy has focused on two related objectives. The primary goal was to increase not only the quantity of giving and volunteering in Pakistan, but the quality as well. In addition to traditional forms of charity to relieve immediate needs or assist victims of disaster or emergency, the Initiative sought to find ways to direct indigenous philanthropy toward long-term social development. By improving the quantity and quality of indigenous philanthropy, the Steering Committee had confidence that the second goal would be achieved: Pakistan moving towards greater self-reliance and away from dependency on external aid.

www.akdn.org/agency/philanthropy/ingphilINTRO.html#initiative

Transatlantic Community Foundation Network (TCFN)

The TCFN provides a platform for the exchange of experience and know-how between European and North American community foundations. The network seeks to identify good practice, develop tools and concepts and share them with emerging and existing community foundations.

www.tcfn.efc.be

Philanthropix Partners, Inc.

Philanthropix Partners is a newly formed information services nonprofit, based in San Francisco.

jim@philanthropix.org

Access Information Project

A cross-sectorial partnership dedicated to solving the world's most pressing problems by radically increasing the volume and impact of investment in community based organizations and social entrepreneurs.

Contact david.bonbright@akdn.ch

GEO Mapping the Field of Funders Networks

GEO has received funding from the David and Lucile Packard Foundation for research to map the universe of grantmaking associations and networks, both formal and informal. Recognizing that research is only valuable if it informs decision-making, this project will consist of two phases:

- an initial research phase that maps the landscape of funder networks, and
- a second phase that will convene infrastructure groups, grantmaker associations and networks to discuss, based on the findings, how these networks should work together to best serve philanthropy and determine a future course of action.

<http://www.geofunders.org/index.cfm?fuseaction=Page.viewPage&pageID=103>

Global Equity Initiative (Hauser Center)

The initiative pursues its mission in three related programs:

- Human Security
- Global Equity
- Global Philanthropy

<http://www.ksg.harvard.edu/gei/research.htm>

International Network on Strategic Philanthropy (INSP)

INSP acts as a decentralized think tank that enables foundation leaders, staff, consultants and researchers as well as representatives of support organizations to gather and disseminate know-how, to place issues of philanthropy and foundation activities on the national and global agenda and to design innovative implementation mechanisms for new approaches in strategic philanthropy.

www.insp.efc.be

Community Foundation Network (UK)

Community Foundation Network (CFN) aims to promote the concept of community foundations in the UK, stimulate and support their growth and best practice, and give support to individual community foundations and their networking with others.

CFN's objective is to ensure a network of thriving community foundations throughout the UK, each one able to strengthen their local community through strategic grant-making and excellent service provision to donors.

To achieve its purpose, CFN upholds a number of external values, including:

- Proactively providing leadership, specialist knowledge and support to members and to the broader community foundation field
- Sharing and promoting knowledge and best practice within the worldwide community foundation movement

www.communityfoundations.org.uk

UK Charitable Trusts Initiative

The Institute for Philanthropy is a non-profit making organisation which was set up in 2000 to develop a greater understanding of philanthropy and its place in modern society, and ultimately to allow philanthropy to thrive by :

- Promoting research into the incentives and barriers to giving
- Devising improved methods for increasing giving
- Ensuring that the maximum benefit reaches the ultimate cause.

www.instituteforphilanthropy.org.uk/in16.html

GVSU Philanthropic and Nonprofit Knowledge Management Initiative

The Philanthropic and Nonprofit Knowledge Management (PNKM) Initiative at the Dorothy A. Johnson Center for Philanthropy and Nonprofit Leadership seeks to capture, organize, disseminate, and promote the use of good practices in the nonprofit sector. The PNKM Initiative seeks to offer nonprofits the opportunity to improve the effectiveness of management, community service learning, and collaboration between grantors and grantees for the success of nonprofit organizations as a whole. It also contains a focus on raising awareness of the need for funder effectiveness, especially through education for grantmakers.

www.gvsu.edu/philanthropy/kmi.htm

Strategic/Effective Philanthropy

Leadership Examples

Leadership Examples

Social Venture or Venture Philanthropy Funds

Roberts Enterprise Development Fund (REDF)

The Roberts Enterprise Development Fund, featured in The Chronicle of Philanthropy, evolved out of a six-year effort to expand economic opportunity for homeless and very low-income individuals through the creation of social purpose business ventures. These businesses, free of "training" time limits imposed by traditional government funded efforts, could employ individuals for longer periods of time and were operated by nonprofits in order to provide transitional and permanent employment to individuals outside the economic mainstream.

www.redf.org/index2.htm

Center for Venture Philanthropy of the Peninsula Community Foundation

The CVP was launched in 1999, to create an environment where community donors could collaborate and drive positive change in their communities. Using a venture capital model, investors base "social venture funding" on results-oriented business plans. Investors work directly with the CVP staff and nonprofit leaders to understand community and nonprofit issues, problem-solve, and structure their investments. The CVP's first Social Venture Fund, the Assets for All Alliance, has won national recognition for its anti-poverty efforts and leads the country in terms of documented results. The Raising A Reader™ venture fund, which provides take-home book bags and children's books to encourage early literacy, continues to expand its local and national outreach, garnering praise from child development experts.

www.pcf.org/venture_philanthropy/

NewSchools Venture Fund

Vision:

The Desired Social Outcome: 21st Century Literacy

To succeed in the knowledge economy of the 21st century, students need a firm grounding in the basic skills. They must read at grade level by 3rd grade; write and communicate clearly, accurately, and compellingly to multiple audiences; master symbolic reasoning by 8th grade, then move on in high school to algebra, geometry, and, ideally, calculus.

But students today must be able to do more than master these foundational skills, as they alone are no longer sufficient to open the doors of opportunity. Students must acquire up-to-date scientific and technology literacy skills; work collaboratively as part of diverse teams; communicate using a variety of media and devices; and participate in their democracy as involved and informed citizens.

www.newschools.org/

Acumen Fund

Mission:

Acumen Fund was established as a non-profit organization to accelerate global change. They operate like a venture capital firm – first, they identify innovations with high potential to solve the tough issues of their time, whether they operate in the non-profit or for-profit sectors. They then support these innovations with financial assistance, technical assistance and connections. Their portfolio managers monitor their results and, importantly, report regularly to their network of “investors”.

Acumen Fund works to continually expand their network of investors who bring not only their charitable contributions, but also their contacts and other resources so necessary for change to be affected. Finally, their investors receive a return of social change rather than financial reward.

Created with seed money from The Rockefeller Foundation, Cisco Systems Foundation and a group of dedicated individual investors, Acumen Fund possesses the stability afforded by mainstream institutions and the flexibility of a small, nimble organization to leverage its resources and credibility with agility and expediency.

Acumen Fund is pioneering new ways to invest charitable contributions in innovations that promise breakthrough products and services to improve the lives of the poor internationally. They believe that the people are the key to change. Their network of investors, innovators and advisors attest to the power of a smart community focused on solving tough problems.

www.acumenfund.org/Acumen/Portal/About/POCShowDoc.asp?path=mission.htm

New Profit Inc.

Vision:

New Profit Inc. believes that high impact social change is possible and necessary in their lifetimes and that the lack of strong incentives and failure to believe in big change has prevented America from tackling these issues. Their theory is that if foundations and individual philanthropists allocated funds based on performance instead of need, they would create an environment that would, in turn, produce higher performing nonprofits. Their plan is to demonstrate this by investing in and partnering with a select group of leading social entrepreneurs. Critical elements of their strategy include: picking winners, building competitive portfolios, awarding long term capacity grants, allocating resources based on performance and providing strategic consulting and governance. Their goal is that the organizations in their portfolio will achieve exponential results and hit societal homeruns because they achieved the necessary resources and incentives.

Mission:

New Profit Inc.'s mission is to partner with the most promising social enterprises and to

help them increase their social impact by providing financial and management development support.

NPI's levers of intervention include the following:

- Identifying proven social entrepreneurs from a rich pipeline of nonprofit leaders.
- Selecting a portfolio of organizations through rigorous due diligence.
- Investing resources for organizational capacity building.
- Providing strategic and growth counsel.
- Managing the portfolio to deliver "social return" and accountability to investors.
- Practicing performance-based funding by allocating resources to the highest performers.
- Planning exit strategies that include increasing revenue generation and attracting new capital sources for portfolio organizations.
- Sitting on portfolio organization's boards.
- Providing access to New Profit Inc.'s extensive network.
- Participating in New Profit Inc.'s learning institutes.

www.newprofit.com

Rinconada Ventures Foundation

Rinconada's team has drawn on the strength of hundreds of talented individuals to begin changing that equation. The foundation offers innovative financing—usually low interest loans and investments—and management consulting support to enterprises for which the opportunities are the greatest, working aggressively to lower the otherwise inherent risks.

www.rinconada.org

CFSV Skoll Fund

Mission:

The Skoll Foundation advances systemic change to benefit communities around the world by investing in, connecting and celebrating Social Entrepreneurs.

Vision:

Their vision is to live in a world of peace and prosperity where all people, regardless of geography, background, or economic status, enjoy and employ the full range of their talents and abilities.

The Skoll Foundation is the largest supporting foundation at CFSV, with its own grant guidelines, Board of Directors and professional staff. Established in 1999, Skoll focuses on promoting social entrepreneurship to effect systemic social and economic change. Founded by Jeff Skoll, and led by Sally Osberg, the Skoll Foundation is focused on benefiting communities locally and around the world.

www.siliconvalleygives.org/skoll.html

Silicon Valley Social Venture Fund

Mission:

By activating new donors and creating philanthropic leaders, SV2 is a network which leverages its collective intellectual, financial, and leadership capital to make a positive, measurable, and strategic difference in the Silicon Valley community.

Vision:

- SV2 is an ever-widening circle of activated, new and seasoned philanthropists. Every Partner is a successful and generous leader in his/her own right whose experience in SV2 has allowed a difference to be made in their local community and beyond.
- Every SV2 Partner is well educated concerning the public benefit sector and is participating financially as well as voluntarily with public benefit corporations on a deep, focused, and thoughtful level.
- An SV2 Partner's experiences in giving through SV2 build individual commitment for life-long philanthropy and for connection with the Community Foundation Silicon Valley and/or other likened groups.
- Both Partners and Grantees reap great benefits from SV2. Partners have formed a close-knit community with other developing philanthropists. Partners who joined early on are fully active in their own philanthropy apart from SV2, and other partners are following suit. They are fulfilling their spoken goals of producing "serial philanthropists."
- The recipients of their SV2 grants have demonstrated growth and development. Among Public Benefit Corporations, SV2 has a reputation for awarding great grants that really help grow organizational capacity. Public Benefit Corporations are eager to receive SV2 grants and to work with them.
- SV2 is the model for similar organizations across the country. They are recognized at the local, state, and federal levels for their philanthropy and volunteerism. They have a well-developed template that is replicated elsewhere.

www.sv2.org

Legacy Venture

Mission:

Legacy Venture's mission is to amplify the size and effectiveness of philanthropy in two unique ways:

- 1) Legacy provides investment access to the best venture capital firms in the country.
- 2) Legacy is a bridge to philanthropic ideas, resources, and people.

Financial Engine: Legacy Venture is a fund-of-funds. Legacy Venture invests in a select group of premier venture capital firms who in turn invest in promising early stage companies. These top funds are highly sought after and are not accessible to anyone

outside of a very small circle of investors. Legacy investors have committed over \$100M to be amplified through venture capital and subsequently donated (with substantial tax savings) to effective philanthropic organizations.

Community: In addition to being a strong financial vehicle, Legacy Venture is building a unique community to improve the effectiveness of charitable giving. Investors gain exposure to world-class philanthropic thinkers in forums, luncheons, and other venues. Particularly exciting is the sharing of causes and best practices among investors. Legacy members are constantly interfacing with exceptional non-profits in almost any area of social interest. Because of the nature and caliber of its investors, the results in the philanthropic arena will likely be as revolutionary and impressive as they have been in the for-profit sector.

www.legacyventure.com

New Ventures (WRI)

New Ventures supports sustainable enterprise creation by accelerating the transfer of venture capital to outstanding investment opportunities that incorporate social and environmental benefits. By providing sound business opportunities for investors and the growing Latin American economy, New Ventures is demonstrating that investing in sustainable enterprises makes good business sense.

New Ventures is the first collaborative effort in Latin America to connect investors with sustainable business leaders. Interest in profitable investments that meet social and environmental criteria is growing. New Ventures is helping to meet this demand by identifying promising enterprises, providing business-mentoring services, and introducing entrepreneurs to potential investors. New Ventures is growing the pipeline of sustainable businesses in Latin America and building local capacity to support hundreds of entrepreneurs in the region.

www.new-ventures.org/aboutus.whatwedo.html

The Entrepreneurs' Foundation

The Entrepreneurs' Foundation (EF) is a new foundation operating in California's Silicon Valley. Its mission? Establish community reinvestment as an integral part of the entrepreneurial culture in the Silicon Valley in particular, and in the Bay Area in general.

http://www.genie.org/op_grantmaker6.htm

New American Schools

New American Schools (NAS) is a leading provider of professional services and investment in K-12 education. As a business-led, nonpartisan, nonprofit organization,

NAS and its strategic partners provide support to state departments of education, school districts, charter authorizers, and networks of schools, offering key stakeholders the tools and external assistance needed to facilitate and sustain both student and adult learning.

www.naschools.org

Blue Ridge Foundation, NY

Blue Ridge Foundation New York operates a Venture Philanthropy Fund to support social change strategies that connect children and families in high poverty communities to the opportunities, resources, and support they need to fulfill their full potential. Blue Ridge works by providing intensive support to new, innovative organizations that seek to address important social issues, especially those related to youth development, education, community building, and the public interest use of technology. They provide significant financial and in-kind resources to a small number of grantees with highly promising concepts and work closely with organization directors to achieve program goals.

www.brfny.org

Impact Partners (India)

A public service venture capital firm, Impact Partners offers professional services and funds to visionary individuals and organizations. They build portfolio organizations that are sector leaders, incubate start-ups, and provide the infrastructure to implement innovative ideas that advocate positive and systemic social change in India.

They believe they must earn the right to advise or invest in social entrepreneurs. Whether that means strengthening their strategic planning, accessing talented individuals, building sector networks, or assisting in fundraising beyond their own commitment, they know it takes more than money to build successful, groundbreaking organizations.

While their vision and strategy is compelling, the real difference comes from the active, hands-on involvement of their investment committee, which combines significant venture capital and social entrepreneurial experience. Their investment committee uses a proactive “outbound” approach to identify capable and distinguished social entrepreneurs, which means they look for you. Daily interactions and regular fieldwork not only allow them to become a team member of the organization but also offer them invaluable learning opportunities.

They manage their investors in a “for profit” manner. Where appropriate, they involve them in specific investments and report to them regularly. And by building a visible brand around Impact as well as select portfolio organizations, they mobilize creative and young people to consider social entrepreneurship as an exciting and serious career option.

www.impactpartners.org

World in Need (UK)

Mission:

To support social change as an expression of their Christian values

They seek to achieve this by

- Investing in the ideas of social entrepreneurs
- Using the techniques of venture philanthropy

www.world-in-need.org.uk

Venture Philanthropy Partners

Mission:

VPP invests in high-potential nonprofit organizations that are serving the core developmental, learning, and educational needs of children from low-income families in the National Capital Region. Although they do not have any desire to achieve a financial return on the money they contribute, they do hope to help nonprofit leaders grow their organizations in size, strength, and community impact. And by demonstrating the value of their approach, they hope to inspire philanthropists, corporate and nonprofit leaders, and public policymakers to help increase the effectiveness and the flow of capital, talent, and other resources to nonprofit organizations showing the greatest potential for improving the lives of children.

<http://www.venturephilanthropypartners.org/>

Social Capital Partners (Canada)

Mission:

Social Capital Partners will invest in and incubate revenue generating social enterprises that employ at-risk youth and other populations outside the economic mainstream in Canada.

The goal of these social enterprises will be to acquire scale, to eventually exist without external funding, and to create improved social outcomes and financial self-sufficiency for the populations they employ.

SCP will be a catalyst for encouraging other creative approaches in the sector aimed at improving social outcomes through the use of innovative funding mechanisms.

www.socialcapitalpartners.ca

Charity Aid Foundation's Venturesome Fund (UK)

Venturesome is an initiative of the Charities Aid Foundation, exploring ways of providing risk or patient capital to charities and social enterprises.

http://www.sel.org.uk/social_enterprise/ViewADocument.asp?ID=289&CatID=99

Global Partnerships

Our mission is to support excellent programs in Latin America that help people to overcome poverty and to encourage individuals and businesses in the U.S. to support promising, businesslike solutions to poverty around the world.

<http://www.globalpartnerships.org/mission.asp>

Impetus Trust (UK)

The UK's first general Venture Philanthropy charitable fund has announced it is targeting a launch in September 2003. The Impetus Trust helps fill a gap in the charity sector by providing long-term funding of core costs, combined with considerable management support. The need for this combination arises particularly when charities are at a point of major change: ready for growth, suffering serious management or financial problems, or contemplating a merger.

<http://www.philanthropyuk.org/giving/17.asp>

ARK– Absolute Return for Kids (UK)

Mission:

ARK's mission is through the support of local and international projects, to transform the lives of children, who are victims of abuse, disability, illness and poverty.

This is achieved by providing grants to charities and charitable projects whose activities have been comprehensively researched by ARK, and where ARK has a high degree of confidence that funds will be efficiently and effectively deployed.

ARK's activities are supervised by an international group of professionals from within the Alternative Investment Industry who apply the same principles and disciplines to managing the charity as they have done in their own businesses.

ARK aims to maximize the impact of all donations and as such, the Board of Trustees and Patrons have arranged to meet the administrative costs of ARK so that 100% of all donations to ARK are used exclusively to help those in need; hence further expanding the opportunities for cost effective giving.

ARK seeks to become a significant platform for philanthropy emanating from the Alternative Investment industry.

www.arkonline.org

Sustainable Jobs Fund

Sustainable Jobs Fund (SJF) helps build great companies. SJF invests in expanding ventures that create excellent employment opportunities in the Eastern United States. SJF and co-investors provide private business equity financing from \$500,000 to \$5 million.

SJF is a community development venture capital fund that uses the tools of venture capital and in-depth management and investors. Sustainable Jobs Development Corporation (SJDC) is a nonprofit organization that provides workforce development and sustainable enterprise service to SJF portfolio and prospect companies and their employees.

www.sjfund.com/cms/

Funding Intermediaries

Global Fund for Women

The Global Fund for Women is a grantmaking foundation supporting women's human rights organizations around the world working to address critical issues such as gaining economic independence, increasing girls' access to education and stopping violence against women.

www.globalfundforwomen.org

Global Fund for Children

The Global Fund for Children was founded in 1994 by Maya Ajmera on the premise that an educational nonprofit group could use the entrepreneurial skills of a start-up company and the power of the market to create a new kind of wealth—social wealth. The Global Fund for Children strives not only to improve the lives of children, but also to integrate their voices into all that they do.

An integral part of their mission is promoting global understanding of cultural and social diversity through communications and educational outreach. Their children's-book-publishing venture, Shakti for Children, offers young readers insight into cultural, social, and environmental diversity. Their award-winning books are powerful educational and advocacy tools that inform children and adults everywhere about the lives of young people. By combining thoughtful grant making and an innovative communications strategy, the Global Fund for Children is helping to expand opportunities for children around the world.

www.globalfundforchildren.org

Global Greengrants Fund

Mission & Overview:

Global Greengrants Fund supports grassroots groups working for environmental justice and sustainability around the world.

Our grants help fund grassroots action in some of the world's most despoiled and impoverished places where other sources of support often are not available. They believe that that grassroots groups are key to solving some of the world's most intractable problems and halting the cycle of poverty, powerlessness and environmental devastation.

To identify prospective grantees they rely on a network of nearly a hundred volunteer advisors around the world. Local scientists and activists, leaders of small networks or coalitions, teachers, journalists, engineers, physicians and international environmental leaders have teamed up with Global Greengrants Fund to identify worthy groups and projects. These volunteers allow us to capitalize on the expertise of people who know first hand where the most exciting and promising work is going on.

www.greengrants.org

Give2Asia

Give2Asia®, a US non-profit organization founded by The Asia Foundation, provides individuals, families, corporations, and foundations with the tools for fulfilling their charitable goals in Asia. They make giving to Asia easier, more effective, and more accountable, and eliminate many of the challenges encountered by international donors.

<http://give2asia.org>

Brazil Foundation

BrazilFoundation channels its resources to not-for-profit organizations, without political affiliations, operating in five key areas: education, health, human rights, citizenship and culture. They select projects for support that distinguish themselves for their ability to transform social conditions in Brazil and serve as models for other social programs in the country.

Partnerships with other philanthropic entities allow BrazilFoundation to function as a bridge between a growing international donor community and selected projects in Brazil. The foundation considers proposals presented by non-governmental organizations from all regions of the country. According to its by-laws, BrazilFoundation, does not fund proposals from individuals. With technical and financial support from **Brazil**Foundation, recipient organizations can maximize their ability to create social change.

www.brazilfoundation.org

America India Foundation

The American India Foundation (AIF) is devoted to accelerating social and economic change in India by connecting communities and resources across the United States and India.

<http://www.aifoundation.org/>

EcoLogic

The EcoLogic Development Fund works to support conservation of wildlife and wild lands throughout Latin America by advancing sustainable development and community-based management of natural resources.

www.ecologic.org

International Development Exchange (IDEX)

International Development Exchange (IDEX) is a San Francisco based non-profit organization that partners with grassroots organizations in seven countries in Africa, Asia and Latin America, while actively engaging and informing North Americans in the challenges facing communities in these regions. Since 1985, IDEX has channeled over \$2.2 million to fund more than 500 self-help community projects that create social change and economic independence for people who earn less than \$1 a day, particularly women, indigenous peoples and youth.

<http://www.idex.org/>

Highly Engaged Donor Funds

Full Circle Fund

“Full Circle Fund members provide so much more than money. Through business consulting they have helped them improve their ventures and the work experience they provide their participants. Through mentoring, they have opened the eyes and minds of their youth to the possibilities of the world. Through networking, they open new markets for their non-profit fundraising efforts and business development.”

www.fullcirclefund.org

Silicon Valley Social Venture Fund

Mission:

By activating new donors and creating philanthropic leaders, SV2 is a network which leverages its collective intellectual, financial, and leadership capital to make a positive, measurable, and strategic difference in the Silicon Valley community.

Vision:

- SV2 is an ever-widening circle of activated, new and seasoned philanthropists. Every Partner is a successful and generous leader in his/her own right whose experience in SV2 has allowed a difference to be made in their local community and beyond.
- Every SV2 Partner is well educated concerning the public benefit sector and is participating financially as well as voluntarily with public benefit corporations on a deep, focused, and thoughtful level.
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- SV2 is the model for similar organizations across the country. They are recognized at the local, state, and federal levels for their philanthropy and volunteerism. They have a well-developed template that is replicated elsewhere.

www.sv2.org

Social Venture Partners – various locations

"Social Venture Partners seeks to develop philanthropy and volunteerism to achieve positive social change in the Puget Sound region. Using the venture capital approach as a model, SVP is committed to giving time, money and expertise to create partnerships with not-for-profit organizations."

SVP is a dual mission organization. They seek to be both an engaged grantmaker as well as a catalyst for smart giving.

Their grantmaking is focused on the following four areas:

- Early Childhood Development and Parenting programs.
- K-12 Education programs that help students to succeed in school and fully realize their academic potential.
- Out-of-School Time programs for youth ages 5-18 that promote quality time with caring adults, and programs that focus on safe places, constructive activities, and opportunities to contribute to the community.

- Environment programs that promote a healthy future for all life in the Puget Sound region by fostering environmental stewardship that are ecologically based and economically sound.

www.svpseattle.org

Entrepreneurs Foundation – various locations

The Entrepreneurs Foundation of Oregon helps companies make a promise that if they are successful, they will give back to the community. The Foundation helps companies set aside stock options for community work and establish community involvement programs. The EF concept originated with investors who understand the benefits to both companies and to the community.

www.efbayarea.org

Washington Women's Foundation

The foundation's purpose is to:

- Inspire women to become leaders in philanthropy
- Demonstrate the impact of large-scale, targeted grant-making
- Provide education in current issues and strategies in philanthropy

www.wawomensfoundation.org

ephilanthropy

Network for Good

Network for Good is the Internet's leading charitable resource — an e-philanthropy site where individuals can donate, volunteer and speak out on the issues they care about. The organization's goal is to connect people to charities via the Internet — using the virtual world to deliver real resources to nonprofits and communities.

Founded in 2001 by the AOL Time Warner Foundation and AOL, Inc.; the Cisco Foundation and Cisco Systems, Inc.; and Yahoo! Inc., Network for Good is an independent, 501(c)(3) nonprofit organization headquartered in San Francisco, California.

In addition to connecting the public with opportunities to give, Network for Good works to advance nonprofit adoption of the Internet as a tool for fundraising, volunteer recruitment and community engagement. It represents a groundbreaking partnership with leading technology and media companies and more than 20 nonprofit foundations and associations who share the desire to foster the informed use of the Internet for civic participation and philanthropy.

www.networkforgood.org

NetAid

Mission:

Their mission is to build an active network of people and organizations in developed countries committed to ending extreme poverty around the world.

In September 2000 world leaders committed themselves to cutting poverty in half by 2015. NetAid brings people together in ways that will help achieve this goal.

www.netaid.org

Charity Navigator

Charity Navigator works to guide intelligent giving. They help charitable givers make intelligent giving decisions by providing information on twenty-five hundred charities and by evaluating the financial health of each of these charities. They ensure their evaluations are widely used by making them easy to understand and freely available to the public. By guiding intelligent giving, they aim to advance a more efficient and responsive philanthropic marketplace, in which givers and the charities they support work in tandem to overcome their nation's most persistent challenges.

Charity Navigator is a 501 (c) (3) non-profit organization under the Internal Revenue Code and does not accept any contributions from any charities they evaluate.

www.charitynavigator.org

GenevaGlobal.com

Last year just 2% of American philanthropy went beyond US borders. Why so little? Their research found that donors did not know where to look or who to trust overseas. Most of all, they lacked confidence that money they gave would produce meaningful results.

Geneva Global Inc. bridges this confidence gap, providing donors with reliable access to effective local initiatives in the world's most difficult places.

www.genevaglobal.com

Global Exchange for Social Investing (GEXSI)

One of the overarching goals of their work at Venture Philanthropy Partners is to share what they've learned and to learn from others in the process. They devote considerable resources to capturing, codifying, and sharing their experiences. "Knowledge capture and dissemination" is a mantra for us. It is key to their strategy of extending the impact of their work to a wide variety of organizations.

www.venturephilanthropypartners.org/learning/resources/exchanges.html

Give Foundation (India)

In essence, they believe that the "giving industry" needs to be professionalized. Not necessarily in terms of conventional stereotypes (MBAs in suits and ties, conferences in 5* hotels), but certainly in terms of bringing highest standards of transparency, accountability and efficiency to the "third sector".

Just as the give-and-take industry (stock markets, etc.) has been professionalized over decades. Their vision is a proactively implemented trickle-down (as opposed to a passively awaited indirect impact of reforms), financed by sensitive and caring Indians all over the world, and backed by the best expertise that ensures that every rupee donated is spent efficiently, transparently and in an accountable manner.

www.givefoundation.org/vision.htm

Charity Technology Turst (UK)

Aim:

To improve charities' efficiency and their donor relationships by the production of fun and secure fundraising and promotional tools on digital media.

www.ctt.org

Visible Hand

Visible Hand™ (VH) is a pragmatic, holistic approach to corporate-sponsored economic development. VH has been active in facilitating relationships between social investors and smaller-scale community-linked organizations and projects in the Middle East and East Africa since 1999.

<http://www.visiblehand.info/>

IEG Sponsor Direct

IEG SponsorDirect was founded to radically improve the way sponsorships are bought and sold. With corporations increasingly turning to the benefits of sponsorship as an integral part of their marketing mix and with the proliferation of sponsorship opportunities, the old way of doing business is rapidly becoming outdated and inefficient. Screening unmanageable numbers of proposals and sourcing the right opportunity has become an overwhelming challenge.

They provide a solution to these problems. By creating a platform for properties to more effectively present themselves to buyers, and by offering sponsors and agencies services to efficiently source the right sponsorships to achieve their business objectives, they offer a better way to realize successful sponsorship relationships.

www.iegsporsordirect.com/marketing/about/articles/bloomberg_radio.asp

GlobalGiving (formerly Development Space)

GlobalGiving allows you to find and fund the world's most unique social and economic development projects. Whether it's university education for Afghan women or clean water for Nigerian villages, GlobalGiving opens up the world to donors that want to make an impact at the grassroots level.

<http://www.globalgiving.com/>

The Virtual Foundation

The Virtual Foundation is a unique online philanthropy program, which supports grassroots initiatives around the world. Carefully screened community improvement projects in the fields of environment, health and sustainable economic activity are posted on their web site. They can be read and funded by online donors.

www.virtualfoundation.org

Highly Engaged Foundations

The Schwab Foundation for Social Entrepreneurs (Switzerland)

Mission:

To be the global reference point for excellence in social entrepreneurship for its leading practitioners and for others working in the public, corporate, citizen, academic and communication sectors that seek to support them

www.schwabfound.org

Edna McConnell Clark Foundation (EMCF)

The Edna McConnell Clark Foundation provides the bulk of its grantmaking support to local nonprofit organizations that work with 9- to 24-year olds during out-of-school time, and which are located on the Eastern seaboard. The Foundation primarily looks for organizations with evidence pointing to the effectiveness of their youth programming. In addition, it makes a small number of grants to national youth-serving organizations whose programs also have been demonstrated to be effective in achieving positive outcomes for youth. (For the most part, such national organizations operate chapters or affiliates in the East Coast areas where we are concentrating our grantmaking - or they are planning to expand into those locations.) Finally, the Foundation make a few very targeted grants to intermediary organizations that directly help its current youth-serving grantees enhance and extend the scope of their work.

www.emcf.org

Rockefeller ProVenEx

The Program Venture Experiment (ProVenEx) seeks to catalyze private-sector investments in areas that will benefit poor and excluded people. Through this program, the Foundation makes philanthropically motivated investments that are structured using market principles in early-stage and growing businesses that will further the work of one of the Foundation's four main themes. To date, ProVenEx's investments include businesses that: create jobs in low-income inner-city communities in the United States, enhance the development and distribution of locally adapted seed varieties to African farmers, develop preventive technologies against HIV, and preserve and distribute culturally important music.

<http://www.rockfound.org/display.asp?context=3&SectionTypeID=55&Preview=0&ARCurrent=1>

The Pew Charitable Trust's Venture Fund

The Pew Charitable Trusts support nonprofit activities in the areas of culture, education, the environment, health and human services, public policy and religion. Based in Philadelphia, with an office in Washington, D.C., the Trusts make strategic investments that encourage and support citizen participation in addressing critical issues and effecting social change.

www.pewtrusts.com/grants/grants_item.cfm?image=img3&program_area_id=16

The Robin Hood Foundation

Since 1988, Robin Hood has targeted poverty in New York City. By applying sound investment principles to philanthropy, they've helped the best programs save lives and change fates.

www.robinhood.org/home/home.cfm

Aga Khan Foundation

The Foundation focuses on a small number of specific development problems by forming intellectual and financial partnerships with organizations sharing its objectives. Most Foundation grants are made to grassroots organizations testing innovative approaches in the field.

With a small staff, a host of cooperating agencies and thousands of volunteers, the Foundation reaches out to vulnerable populations on four continents, irrespective of their race, religion, political persuasion or gender. In 1999, it funded 120 projects in 13 countries and spent \$88.9 million.

www.akdn.org/agency/akf.html

Jacobs Family Foundation

The Jacobs Foundation was established by Klaus J. Jacobs in December, 1988, in Zurich, Switzerland, as a private philanthropic organization. It operates throughout the world. The Foundation supports scientific research projects and their implementation which

- lastingly enhance the quality of young people's lives
- promote their personal and professional development, and
- enable them to personally contribute to shaping tomorrow's world

www.jacobsfoundation.org/portrait/p0.htm?Openpage

Kirlin Foundation/eFundLLC

eFund is an investment partnership focused on early-stage investments in communications and Internet companies. They are experienced company founders and builders who have been actively involved in starting, growing, managing, financing and supporting high-growth technology companies. They have been engaged both in senior management positions, as advisors and investors. As investors, they have invested in over 60 high-tech investments in the past few years which have a combined equity today of over \$20 billion.

www.efundllc.com/efundo.htm

The Broad Foundation

Mission:

The Broad Foundation's mission is to dramatically improve K-12 urban public education through better governance, management and labor relations.

www.broadfoundation.org

Tides Foundation

Mission:

The Tides Foundation partners with donors to increase and organize resources for positive social change.

They facilitate effective grantmaking programs, create opportunities for learning and build community among donors and grantees.

www.tidesfoundation.org

Kirsch Foundation

Vision:

They want a safe and peaceful world, one without the threat of destruction. They want a healthy world, one without disease and without pollution of their air, water and land, and one in which all species have the ability to survive and flourish.

Mission:

They invest in causes where high-impact, leverageable activities can result in a safer and healthier world. Using whatever means are most effective, they work to solve significant problems and issues that place individuals, the world community, and the world itself at risk.

www.kirschfoundation.org

Mott Foundation

Vision:

The Charles Stewart Mott Foundation affirms its founder's vision that each of us "is in a partnership with the rest of the human race" - that each individual's quality of life is connected to the well-being of the community, both locally and globally. They pursue this vision through creative grantmaking, thoughtful communication and other activities that enhance community in its many forms. The same vision of shared learning shapes their internal culture as they strive to maintain an ethic of caring, integrity and service. The Foundation seeks to strengthen, in people and their organizations, what Mr. Mott called "the capacity for accomplishment."

www.mott.org

Strategic Philanthropy Foundations

The Hewlett Foundation

The Hewlett Foundation, incorporated as a private foundation in the State of California in 1966, was established by the late Palo Alto industrialist William R. Hewlett, his wife, Flora Lamson Hewlett, and their eldest son, Walter B. Hewlett. The Foundation's broad purpose, as stated in the articles of incorporation, is to promote the well-being of humanity by supporting selected activities of a charitable nature, as well as organizations or institutions engaged in such activities.

www.hewlett.org

Ford Foundation

The Ford Foundation is a resource for innovative people and institutions worldwide. Their goals are to:

- Strengthen democratic values,
- Reduce poverty and injustice,
- Promote international cooperation and
- Advance human achievement

This has been their purpose for more than half a century.

www.fordfound.org

W.K. Kellogg Foundation

Mission:

"To help people help themselves through the practical application of knowledge and resources to improve their quality of life and that of future generations."

The W.K. Kellogg Foundation is a nonprofit organization whose mission is to apply knowledge to solve the problems of people. Its founder W.K. Kellogg, the cereal industry pioneer, established the Foundation in 1930. Since its beginning the Foundation has continuously focused on building the capacity of individuals, communities, and institutions to solve their own problems.

www.wkkf.org

Charles and Helen Schwab Foundation

Vision:

The Charles and Helen Schwab Foundation is a private charitable organization that serves to steward a philanthropic vision of investing in people to transform their lives, their work and their society for good. The Foundation was established by financier Charles R. Schwab and his wife Helen O'Neill Schwab. Through direct service and partnership in grantmaking initiatives, the Foundation seeks to impact individual lives in a meaningful, lasting way and work collaboratively to inform philanthropic practices.

www.schwabfoundation.org

Omidyar Foundation

Mission:

To provide leadership that will...

 Inform, inspire and engage individuals,

 Be a catalyst for connectivity; and,

 Create enabling environments

To cultivate community effectiveness.

The enduring aspects of building effective communities seems to be, not in the initiatives themselves, but in the capacity for change that they build, the connections they forge among people and organizations, the broad strategic principles they promote and the opportunity for knowledge development they provide.

The Foundation's investing is guided by the conviction that the union of self-organization and self-help creates empowerment, brings dignity and self-respect, and in turn generates human creative energy leading to sustainable, effective communities.

Priority for investing is given to community-based, participatory, innovative and integrated approaches that respect the local culture of the community and reinforce civil society.

Through long-term investing in initiatives and through research, policy dialogue, convenings and publication, The Foundation shares its knowledge and experience with others.

The Foundation's current work is geographically focused in the United States.

www.omidyar.org

Robert Wood Johnson Foundation (RWJF)

The Robert Wood Johnson Foundation seeks to improve the health and health care of all Americans. To achieve the most impact with our funds, we prioritize our grants into four goal areas:

- To assure that all Americans have access to quality health care at reasonable cost. More than 40 million Americans, nearly 10 million of them children, go without health insurance. This is the single greatest barrier to obtaining timely, appropriate health care services.
- To improve the quality of care and support for people with chronic health conditions. One hundred million Americans suffer from chronic health conditions, and that number is almost certain to increase as the population ages.
- To promote healthy communities and lifestyles. Our health behaviors, level of social interaction, and other factors outside medical care are important influences on overall health.
- To reduce the personal, social and economic harm caused by substance abuse — tobacco, alcohol, and illicit drugs. Tobacco, alcohol, and illicit drugs inflict an enormous toll on Americans, especially among our youth.

<http://www.rwjf.org/index.jsp>

Surdna Foundation

Family stewardship of Surdna over the years has been informed by Mr. Andrus' values: thrift, practicality, modesty, loyalty, excellence and an appreciation for direct service to those in need. These values have been applied both to oversight of the two Memorials and to more general grant programs. In 1989, the third and fourth generations of the Andrus family on the Surdna board established programs in Environment and Community Revitalization and decided to enlarge the professional staff to broaden the Foundation's effectiveness. In 1994, programs in Effective Citizenry and the Arts were added. The Nonprofit Sector Support Program was added in 1997 to address crosscutting issues affecting the sector.

www.surdna.org

Gates Foundation

The Bill & Melinda Gates Foundation is building upon the unprecedented opportunities of the 21st century to improve equity in global health and learning—because the life and potential of a child born in one place is as valuable as that in another.

www.gatesfoundation.org/AboutUs/

Rockefeller Foundation

The Rockefeller Foundation is a knowledge-based global foundation with a commitment to enrich and sustain the lives and livelihoods of poor and excluded people throughout the world.

www.rockfound.org

Skoll Foundation

Skoll Foundation Mission:

The Skoll Foundation advances systemic change to benefit communities around the world by investing in, connecting and celebrating social entrepreneurs.

Skoll Foundation Vision:

Our vision is to live in a world of peace and prosperity where all people, regardless of geography, background, or economic status, enjoy and employ the full range of their talents and abilities.

"Many of the problems of our modern world, ranging from disease to drugs to crime to terrorism, derive from the inequities between rich and poor...be they rich nation vs poor nation or rich community vs. poor community. It is in the best interests of the well-off to help empower those who are not as well-off to improve their lives."

-Jeff Skoll, 03.25.02

www.skollfoundation.org

Hitachi Foundation

Mission:

The Hitachi Foundation is a nonprofit, philanthropic organization that promotes social responsibility through effective participation in global society. The Foundation seeks to build the capacity of all Americans, particularly those underserved by traditional institutions. The Foundation helps people address the multicultural, community and global challenges they face.

www.hitachi.org

Bradley Foundation

The Lynde and Harry Bradley Foundation is devoted to strengthening American democratic capitalism and the institutions, principles and values that sustain and nurture it. Its programs support limited, competent government; a dynamic marketplace for economic, intellectual, and cultural activity; and a vigorous defense at home and abroad of American ideas and institutions. In addition, recognizing that responsible self-government depends on enlightened citizens and informed public opinion, the Foundation supports scholarly studies and academic achievement.

www.bradleyfdn.org

Canadian Women's Foundation

Canadian Women's Foundation (CWF) is Canada's first and only national public foundation dedicated to improving the lives of women and girls through economic and social change. The Foundation raises funds and makes grants to charitable projects that help women and girls achieve greater self-reliance and economic independence.

www.cdnwomen.org

Maytree Foundation (Canada)

The Maytree Foundation is a private Canadian charitable foundation established in 1982. The Foundation is committed to reducing poverty and inequality in Canada and to building strong civic communities. The Foundation seeks to accomplish its objectives by identifying, supporting and funding ideas, leaders and leading organizations that have the capacity to make change and advance the common good

www.maytree.com

Wallace Foundation

Our mission is to enable institutions to expand learning and enrichment opportunities for all people. We do this by supporting and sharing effective ideas and practices. To achieve our mission we have three objectives:

- Strengthen education leadership to improve student achievement
- Improve after-school learning opportunities
- Expand participation in arts and culture

<http://www.wallacefunds.org/>

Other Engaged Grantmaking

The Chicago Public Education Fund

As a venture capital fund for public education, The Fund invests in high-impact programs to improve school leadership and student achievement system wide.

Launched by a group of corporate and civic leaders, The Fund brings private sector dollars and expertise to effective programs that align with Chicago Public Schools priorities.

Supporting The Chicago Public Education Fund is good business. The Fund is unique:

- An unprecedented catalyst for private sector investment in system-wide Chicago school reform
- A venture capital model means maximum return on investment
- Close alignment with Chicago Public Schools leverages their investments to make a measurable impact on the system
- A focus on school leadership--the most widely agreed upon way to improve student achievement
- A strong impact on the future workforce of local businesses and the future of the city

Better schools are everybody's business.

www.cpef.org

Common Good Investment in nonprofit Solutions

Common Good Ventures is a philanthropic organization that partners with nonprofit groups to improve their performance. They utilize capital investments and long-lasting business-consulting partnerships to assist nonprofit groups in delivering more social good for every philanthropic dollar invested. Focused on accountability and results, Common Good Ventures provides nonprofits with the basics for success, ultimately leading them to greater self-sufficiency.

www.common-good.net/about.html

The Diana Princess of Wales Memorial Fund

The Memorial Fund started with the donations at the time of the Princess's death in 1997. Five years on, they have built a global humanitarian organization, creating a living memorial to Diana, Princess of Wales. Their strapline The Work Continues says it all.

www.theworkcontinues.org

Southern California Social Enterprise Initiative

This report describes the results of a study of the capacity development needs of local nonprofit business enterprises, and outlines a comprehensive, coordinated strategy to support nonprofit social purpose business activity throughout Southern California. The Southern California Social Enterprise Initiative described in this report will support businesses established by nonprofit organizations that create jobs and job training opportunities for low-income, disabled and disadvantaged individuals.

www.cnmsocal.org/AboutNonprofits/VFI.PDF

Three Guineas Fund

Mission:

Virginia Woolf wrote the book *Three Guineas* in 1938. In it, she examines women's philanthropic choice and develops a theory of social change based on investing in women and girls. The Foundation's name reflects this key principle and core strategy. *Three Guineas Fund promotes social justice by creating economic opportunity for women and girls.* The Fund's strategies, criteria, and philanthropic program are designed to achieve social justice gains that enable women and girls to earn an independent living, participate fully in the economy, and give back to their communities.

www.3gf.org

Jewish Venture Philanthropy Fund

Mission:

The mission of the Jewish Venture Philanthropy Fund is to identify and support initiatives which will have a significant impact on the quality of Jewish life, reinvigorate Jewish institutions, ensure a bright Jewish future, and leverage personal philanthropy through collaborative giving.

www.jvpf.org

A Glimmer of Hope Foundation

It's of women being able to care properly for their children. It's of people digging their own wells, building their own schools, creating enterprise in agriculture and industry, rebuilding their villages and improving their lives.

A Glimmer of Hope does not aim to cure Ethiopia. It extends its hand and its heart to a nation torn apart by starvation, AIDS, disease and war. In a country where terrible suffering is commonplace, the foundation's role is to help the Ethiopians by providing them with money and expertise.

The vision is of a global foundation operating as an entrepreneurial business. Profit will not be measured in terms of personal gain but in terms of social impact.

Another important part of the vision of A Glimmer of Hope is the unique offer it makes to its supporters and donors - 100 percent of every donation will reach the people who need it.

www.aglimmerofhope.org

Kingdom Ventures

At Kingdom Ventures, they invest in people with the heart, faith, and skills to build innovative ministries where God is at work. Their focus is to provide these individuals with capital, business guidance, and contacts to help build and sustain their ministry. Kingdom Ventures fully believes that their role in any ministry building process is secondary. There is no substitute for prayer and the power of the Holy Spirit. There is no substitute for listening to God's voice and being in His will. Nor is there any substitute for loving God and loving those around them. But, they recognize that just as there are many parts to the Body of Christ, likewise there are many pieces to the building of any ministry. Their focus is on the piece of financing, organizational planning, and tactical execution. They desire people to come to have saving faith in Jesus Christ. They desire for the poor to be ministered to as Jesus intended. They desire for the sick to be healed. They desire for the outcast to know the love of God. Their objective is to help build ministries that share this vision.

www.kingdomventures.org

First Nations Development Institute

Mission:

First Nations Development Institute is a Native American nonprofit of 20 years' standing. Their primary mission is to promote culturally appropriate economic development by and for Native peoples; to this end they serve as an educator, advocate, researcher, funder, fundraiser, and purveyor of information, resources and ideas. They are preparing a better future for Native Americans, and your understanding is part of their provision for getting from here to there.

www.firstnations.org

Donor Advised Funds

Fidelity Charitable Gift Fund

Mission:

Their mission is to bring more dollars and donors to charitable giving. An active community of donors and nonprofit organizations has grown rapidly, underscoring their shared commitment to make a difference for people and causes in need across the country.

www.charitable-gift.org/

Vanguard Charitable Endowment Program

The Vanguard Charitable Endowment Program has changed all that. Established by The Vanguard Group in 1997, we've quickly become a nationally-recognized, independent donor-advised fund as a result of our:

- Exceptionally low costs
- Simplified gifting process
- Personalized service

Lower-costs, fewer complications, better service - enriching the lives of others has never been easier.

www.vanguardcharitable.org

American Gift Fund

<http://www.giftfund.org/>

Calvert Giving Fund & Giving Folios

Calvert Giving Fund is a donor advised fund that allows you to combine the positive impact of socially responsible investment with strategic giving over the years, building a lifelong commitment to philanthropy.

[www.calvertgiving.com/giving_fund.htm?source=
www.calvertgiving.com/folios.htm](http://www.calvertgiving.com/giving_fund.htm?source=www.calvertgiving.com/folios.htm)

Tides Foundation

Tides donor advised funds provide an alternative to direct giving or setting up a private foundation. As a fund advisor, you contribute cash, securities or other property to your fund and retain the privilege of recommending grants to social change organizations of your choice. In accordance with IRS regulations, ultimate grant approval remains with our Board of Directors.

www.tidesfoundation.org

Socially Responsible Investing (SRI)

General Overview

Socially Responsible Investing (SRI)

General Overview

Information Resources(Books, Articles, Websites)

SocialFunds.com

SocialFunds.com is a website of SRI World Group, Inc., a news, research, and consulting firm that advises clients regarding sustainability investment issues and corporate responsibility practices.

Whether you are an institutional investor that is seeking to utilize sustainability criteria in your investment process or a medium- or large-sized company trying to identify the value of corporate responsibility practices, they can help

www.socialfunds.com

Social Investment Forum Websites (socialinvest.org & UKSIF.org)

The Social Investment Forum site offers comprehensive information, contacts and resources on socially responsible investing.

www.socialinvest.org

www.uksif.org/Z/Z/Z/dir/main/index.shtml

Sustainable Business.com

Vision:

A world where human activities live in harmony with earth's carrying capacity

<http://www.sustainablebusiness.com/>

KLD Socrates Social Research Tool

KLD Research & Analytics, Inc. is the leading provider of social research for institutional investors. KLD Research & Analytics, Inc. serves institutional clients who wish to integrate social criteria into their investment decisions.

To meet the needs of social investors, KLD provides performance benchmarks, corporate accountability research, and consulting services analogous to those provided by financial research service firms.

KLD has been providing research products and services to the financial services market since 1988. Featuring the largest corporate social research staff in the world, KLD produces high-quality consistent research that institutions have come to rely on.

www.kld.com

“Envisioning Socially Responsible Investing” by Steven D. Lydenberg

Lydenberg, Steven D. Envisioning Socially Responsible Investing. Greenleaf Publishing, 2002.

Within the past five years, socially responsible investing (SRI) along with the related discipline of corporate social responsibility (CSR) have attracted worldwide attention. The strong momentum behind these two movements implies that they will soon work their way into the mainstream of the financial and corporate worlds. Much needs to happen, however, before they are fully integrated. This paper envisions major SRI and CSR initiatives that may well take place within the next five years in the three communities: the corporate community (increased attention to mission, stakeholders and disclosure), institutional investors (increased responsibility for voting, public disclosure of social investment policies and increased intra-industry dialogue on social and corporate governance issues) and the financial community, including its academic and SRI analogues (increased attention to education, training and the professionalisation of the SRI and CSR disciplines). Looking ahead to the potential outcomes of these initiatives will help in assessing their usefulness and in allocating the resources necessary to implement them.

www.domini.com/common/pdf/SL_SRI_Vision.pdf

Social Investment Forum’s “2001 Report on Socially Responsible Investing Trends in the US”

In examining socially and environmentally responsible investing trends in the two years since its last study, the Social Investment Forum found that the field is healthy and expanding. All of the socially responsible investment strategies embraced by socially conscious investors in the U.S.—screening, shareholder advocacy, and community investing—have enjoyed a robust two years of activity.

www.socialinvest.org/areas/research/trends/SRI_Trends_Report_2001.pdf

The Corporate Library

The Corporate Library is intended to serve as a central repository for research, study and critical thinking about the nature of the modern public corporation, with a special focus on corporate governance and the relationship between company management, boards and shareholders.

<http://www.thecorporatelibrary.com/>

“The Environmental Fiduciary Project” – Rose Foundation

Mission:

- Fostering community and environmental stewardship.
- Improving communications between businesses and their neighbors.
- Recognizing individual responsibility for the environmental consequences of personal actions
- Forging positive links between environmental stewardship and sustainable job creation
- Harnessing economic power to leverage environmental sustainability
- Instilling respect for the inalienable rights protected by their nation’s constitution and the essential human rights to clean air, clean water and individual dignity

www.rosefdn.org/efp.html

“Engaging the Mainstream with Sustainability” by B. Pierce & J. Ganzi

Ganzi, John and Brian Pierce, “*Engaging the Mainstream with Sustainability: A Survey of Investor Engagement on Corporate Social, Environmental and Ethical Performance*,” Forum for the Future’s Centre for Sustainable Investment and The Finance Institute by Global Sustainability, August 2002.

<http://www2.bren.ucsb.edu/~aloret/epacapmks/John%20Ganzi%20Engaging%20the%20Mainstream.pdf>

“Socially Responsible Investing, Making a Difference and Making Money” book by A. Domini

Selecting investments to meet specific social criteria, and keeping the twin goals of justice and environmental sustainability at the forefront, investors can achieve better results in their portfolio and create a better future. For every investor who wants the money to follow the principles, Socially Responsible Investing outlines all the details to bring congruence to investing and social awareness.

Amy Domini, the woman whose name is on the premier index of socially responsible companies, has become one of the most visible and outspoken advocates for SRI. The Domini 400 index tracks highly targeted, select socially responsible companies. This benchmark index, and The Domini Social Equity Fund, a mutual fund that invests in indexed companies, are the brainchildren of Domini and her partners who set out to prove that investing with conscience can be a profitable venture. For its eight years since inception, the fund’s results beat the S&P 500.

<http://www.amazon.com/exec/obidos/tg/detail/-/0793141737/104-5698325-8867125?v=glance>

“The Rise of Fiduciary Capitalism” by J. Hawley & A. Williams

Fiduciary institutions primarily public and private pension funds now own almost 50 percent of the equity of American corporations. And about 50 percent of Americans now either own stock individually or have a retirement interest in these institutions. Hawley and Williams (both of the School of Economics and Business Administration, Saint Mary's College of California) argue that this has put fiduciary institutions into position as "universal owners" with a significant stake in a broad cross-section of the largest publicly traded US firms. They thus have the potential to make the firms they invest in more responsive to the needs of the Americans to whom they are responsible, and so make the firms more democratic. Annotation c. Book News, Inc., Portland, OR (booknews.com)

<http://search.barnesandnoble.com/booksearch/isbnInquiry.asp?userid=36240P4TW0&isbn=0812235630&itm=18>

“A Capital Idea: Total Foundation Asset Management and The Unified Investment Strategy” by J. Emerson

http://www.socialvc.net/FileUpload/A_Capital_Idea_Final_Version%5B1%5D.pdf

The Green Pages and Connections Newsletter (Co-op America)

Co-op America's Green Pages Online™ is America's premier directory of qualified green companies — companies with demonstrated commitments to social and environmental responsibility. All companies in the Green Pages Online™ have been screened and approved by Co-op America.

www.greenpages.org/about.cfm

SRIstudies.org Website

This website is intended as a resource for people interested in the impact of social screening on investment performance, and in other quantitative aspects of socially responsible investing (SRI). This site is updated annually and includes:

- An annotated bibliography of quantitative studies of socially responsible investing.
- A list of the sixteen studies I believe merit your closest attention.
- A revised version (last updated in September 2000) of an essay on the academic literature that was originally published in *Journal of Investing*.
- Links to other SRI sites of interest.

<http://www.sristudies.org/>

Calvert Website

Calvert Web site provides you with a full range of interactive tools and information on Calvert's investment products and socially responsible investing. Whether you're a shareholder, financial advisor, or an individual or institutional investor, their site has information and tools designed especially for you.

www.calvertgroup.com

Trillium Website

For over twenty years, Trillium Asset Management Corporation has been the leader in socially responsible investing. We are guided by a belief that active investing can offer good returns to the investor, while also promoting social and economic justice. Trillium Asset Management is an independent employee-owned firm, dedicated to professional, high quality, individualized service for our valued clients.

<http://www.trilliuminvest.com/>

“Investing for Good: Making Money While Being Socially Responsible” by Kinder, Lydenbury & Domini

Kinder, Peter D., Steven D. Lydenberg Amy L. Domini. Investing for Good: Making Money While Being Socially Responsible. HarperCollins, 1994.

www.amazon.com/exec/obidos/ASIN/0887306624/inktomi-bkasin-20/102-2513133-6405710

SRI World's Leading Social Investment Indicators Report 2001

Keeping on top of important news in the growing social investment industry can be a time consuming endeavor for investment professionals and institutional investors. The Leading Social Investment Indicators Report (2001) summarizes last year's developments, trends, new products, and relevant statistics.

The Leading Social Investment Indicators Report offers one centralized source for the information you need - saving you time and enabling you to serve your clients or institutions better.

<http://www.ishareowner.com/reports.html#indicators>

“The New Global Investors: How Shareowners Can Unlock Sustainable Prosperity Worldwide” by R. Monks

Monks, Robert A.G. *“The New Global Investors: how Shareowners Can Unlock Sustainable Prosperity Worldwide,”* 1st ed. Capstone Pub, 2001.

Summary:

Large corporations dominate their world. More than any other factor it is corporations that decide who is rich and who is poor, what kind of education they enjoy, the quality of their environment and the use of force in international affairs. Corporate energy is perceived as the single most effective tool for creating wealth and solving society’s problems. But there is a price, and a new and potentially destructive element has emerged which fundamentally changes and increases the danger that big business represents. Through control over their boards of directors, their compensation committees, ‘independent’ consultants, the accounting authorities and even governments, CEOs have acquired the capacity to pay themselves as much as they wish. Is there now any effective limit to the power of corporate management? As the world’s most prominent and notorious shareholder activist, Robert Monks has relentlessly stalked ineffective management waging it shaking it and replacing it.

www.amazon.com/exec/obidos/tg/detail/-/1841121096/ref=ase_inktomi-bkasin-20/102-2513133-6405710?v=glance&s=books

ASRIA.org

Sustainable and Responsible Investment (SRI), also known as Socially Responsible Investment, is investment which allows investors to take into account wider concerns, such as social justice, economic development, peace or a healthy environment, as well as conventional financial considerations.

www.asria.org

PaxWorld Website

Pax World enables investors to align their financial goals with their personal values through a selection of professionally managed socially responsible mutual funds. By screening companies not only by their investment potential but also by standards of social responsibility, Pax World challenges companies to reach for a higher "bottom line" and offers investors the opportunity to do good while doing well.

<http://www.paxfund.com/proxytimeline.htm>

“The SRI Advantage: Why Socially Responsible Investing has Outperformed Financially” book by P. Comejo

SocialFunds.com

With the completion of The SRI Advantage, Peter Comejo has filled a large gap in the existing literature about socially responsible investing. Previous books have concentrated on how one can and why one should participate in social investing, often from ethical or moral perspectives. Mr. Comejo's contribution is focused squarely on dispelling a widely held myth that SRI investments do not earn competitive returns. Mr. Comejo is very well versed in SRI strategies. He is the founder and chair of Progressive Asset Management, an investment firm that specializes in SRI. (Continued on website).

<http://www.growingwealthy.com/prod/0865714770.html>

Domini Social Investments Website

They are an investment firm specializing exclusively in socially responsible investing. They manage more than \$1.5 billion in assets for individual and institutional investors who wish to integrate social and environmental criteria into their investment decisions.

www.domini.com

Green Money Journal

We are approaching SRI from a variety of different angles in this issue. In the mix are the Sustainable Business top 20 stocks, Barron's SRI cover article, plus SRI mutual fund news and a report on Shareholder Advocacy. This will give you a partial picture of the fast growing and ever expanding SRI marketplace. Online at- www.greenmoney.com you will find even more SRI articles and a useful list of resources including books and web sites.

www.greenmoney.org

Brooklyn Bridge Newsletter

Brooklyn Bridge is a knowledge broker, specializing in Triple Bottom Line or Social Responsibility. We make connections for companies and individuals from the old to the new sustainable economy, by utilizing our extensive global network. The focus is finance.

<http://www.tbli.org/>

“The Magic Roundabout” report by B.D. Bell & S. Vincent

The launch of The Magic Roundabout, a new publication on program related investment for charities, was hosted by the Chief Secretary to the Treasury, The Rt Hon Paul Boateng MP, at 11 Downing Street on 6 May 2003. The Chancellor of the Exchequer, the Rt Hon Gordon Brown MP, wrote the foreword to the publication.

Westminster law firm, Bircham Dyson Bell, is pleased to be involved with The Magic Roundabout. The publication aims to help charities to use program related investment as one of the ways in which they can achieve their charitable objects.

With practical advice and many case studies, The Magic Roundabout explores how charitable funds can be creatively recycled and explains how charities can make their money go further. It sets out how charitable investments and grants budgets can be made to work harder, and smarter, through program related investment.

www.bdb-law.co.uk/html/news/recent/article1.html

The Progressive Investor Newsletter by Sustainable Business.com

Progressive Investor shows you how and when to invest in the companies leading the way to a clean economy: fuel cells, renewable energy, green building, organic foods. It is the only newsletter that covers the top sustainable companies across the full range of industry sectors worldwide. Let them help you make informed, financially sound investments that support your ethical principles.

www.sustainablebusiness.com/progressiveinvestor/index.cfm

iShareowner.com Website

ishareowner is a website of SRI World Group, Inc., a financial information services and consulting company. The company is a leading provider of news, data, and analysis to the sustainable and responsible investing and corporate social responsibility markets. It specializes in understanding the implications of market trends and the use of sophisticated online databases.

SRI World Group does not sell investment products and is not an investment advisor and thus can provide objective information and analysis to clients.

SRI World Group was founded by Jay Falk in 1998 in response to an information gap about social, environmental, and ethical issues in investing and corporate operations. Jay has more than 16 years of experience in the social investment field and is a former board member of the Social Investment Forum.

www.ishareowner.com

Shareholder Action Network

Mission:

The Shareholder Action Network serves as a clearinghouse of information and analysis to the socially responsible investing community on shareholder advocacy. A project of the Social Investment Forum, they seek to link institutional investors and financial advisors with faith-based groups, and social justice, labor, and environmental organizations to encourage greater corporate responsibility.

SAN 's goal is to create a network of support for investors and shareholder advocacy organizations, promoting communication amongst diverse constituencies on corporate issues up for a proxy vote. Through their web site, publications, Shareholder Advocates Directory, and their Shareholder Action Online Discussion Group, they build momentum for the resolution process, as well as educate their members on key environmental, corporate governance, and workplace issues.

www.shareholderaction.org

Morning Star Reports on SRI Funds

<http://search.morningstar.com/MstarSrch/MstarSrch2.aspx?topnav=search>

Shareholderaction.org Website

Mission:

The Shareholder Action Network serves as a clearinghouse of information and analysis to the socially responsible investing community on shareholder advocacy. A project of the Social Investment Forum, they seek to link institutional investors and financial advisors with faith-based groups, and social justice, labor, and environmental organizations to encourage greater corporate responsibility.

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www.shareholderaction.org

Foundation Partnership on Corporate Responsibility Website

<http://www.foundationpartnership.org/>

“The Emperor’s Nightengale: Restoring the Integrity of Shareholder Activism”
book by R. Monks

Weaving together parables and case studies, and drawing from the new science of complexity, Monks reveals the true character of the corporation as it struggles to reconcile the opposing forces of certainty and uncertainty, the predictable and the serendipitous, the mechanistic and the human. The Emperor's Nightingale paints a picture of the corporation at a crossroads, its future dependent upon its ability to balance the internal drive for maximizing profits with its responsibility to society, customers, employees, and - most importantly - its owners, the individual and institutional investors. Successful companies of the future will be those that learn to manage the ever-changing relationships among these actors and are willing to invest in delivering long-term economic value rooted in the social good.

<http://btobsearch.barnesandnoble.com/booksearch/isbninquiry.asp?endeca=1&sourceid=00395996645644787198&btob=Y&ean=9780201339963>

Dow Jones Sustainability Group Indexes

The Dow Jones Sustainability Indexes are a cooperation of Dow Jones Indexes, STOXX Limited and SAM Group. By bringing together the expertise of two leading index providers and the world-renowned pioneer in sustainability investing, the DJSI family rests on a strong foundation to meet the growing market demand for professional, objective and reliable sustainability benchmarks.

www.sustainability-index.com

Resource organizations

SRI Compass/CSR Europe

The SRI Compass website aims to guide you through the world of socially responsible investment (SRI) in Europe and point you in the right direction for your SRI needs.

www.sricompass.org

KLD Research & Analysis Inc.

KLD Research & Analytics, Inc. is the leading provider of social research for institutional investors. KLD Research & Analytics, Inc. serves institutional clients who wish to integrate social criteria into their investment decisions.

To meet the needs of social investors, KLD provides performance benchmarks, corporate accountability research, and consulting services analogous to those provided by financial research service firms.

KLD has been providing research products and services to the financial services market since 1988. Featuring the largest corporate social research staff in the world, KLD produces high-quality consistent research that institutions have come to rely on.

www.kld.com

Interfaith Center on Corporate Responsibility (ICCR)

ICCR is a thirty-year-old international coalition of 275 faith-based institutional investors including denominations, religious communities, pension funds, healthcare corporations, foundations and dioceses with combined portfolios worth an estimated \$100 billion. As responsible stewards, they merge social values with investment decisions, believing they must achieve more than an acceptable financial return. ICCR members utilize religious investments and other resources to change unjust or harmful corporate policies, working for peace, economic justice and stewardship of the Earth.

www.iccr.org

Social Investment Forum

The Social Investment Forum site offers comprehensive information, contacts and resources on socially responsible investing.

www.socialinvest.org

Sustainable Investment Research Institute

The Sustainable Investment Research Institute (SIRIS) has been developed as a dedicated research group, providing social investment research to wholesale and retail investors, lenders and other users of financial analytical data.

www.siris.com.au

INAISE (International Association of Investors in the Social Economy)

INAISE is an international network of "social investors" which was created in 1989 by seven founding members - seven financial organizations who wished to share experience and work on common projects.

The explicit goal of the association and its members was, and still is, to foster and support the development of financial organizations which invest in enterprises of an ethical, ecological, cultural and self managing nature, including women s undertakings and enterprises run by ethnic minorities, in enterprises whose aims encompass the needs of disabled people, healthier living, peace and the Third World, in enterprises working within the social economy generally.

www.gdrc.org/icm/network/inaise.html

Investor Responsibility Research Center (IRRC)

IRRC is an independent research firm that has been the leading source of high quality, impartial information on corporate governance and social responsibility issues affecting investors and corporations, for 30 years. Founded in 1972, IRRC provides research, software products and consulting services to more than 500 institutional investors, corporations, law firms, academics, foundations, religious institutions and other organizations. IRRC is unique in the industry as it does not advocate on any side of the issues it covers. Clients can be assured that the information and analysis it provides is objective and unbiased.

www.irrc.org

SRI World

SRI World Group Inc. is a leading provider of social investing and corporate social responsibility information. We pride ourselves at being independent and objective sources of information that empower individuals and institutions.

Originally called SocialFunds.com, SRI World Group was founded in 1999 by Jay Falk. SocialFunds.com was an idea that was born during Jay's 15 years in the social investing industry to bring information to individual investors. SRI World Group now also serves institutional investors with news, research, consulting and other services that can be found at www.ishareowner.com. We also assist corporations in delivering their positive corporate social responsibility messages through CSRwire. In addition, we provide strategic web development focusing on dynamic databases and administrative controls.

As part of its effort to employ corporate social responsibility strategies, SRI World Group has prepared a [2002 Environmental Assessment](#) that details our environmental impacts and efforts to mitigate these impacts. Please take an opportunity to read the report.

<http://www.sriworld.com/>

Sustainable Asset Management (SAM)

SAM Sustainable Asset Management is an independent asset management company headquartered in Zurich, Switzerland. Established in 1995, SAM was among the first asset managers to specialize in the field of sustainability-driven investments.

www.sam-group.com

Finasol (France)

www.finasol.org is the unique French portal allowing anyone to discover French Social and Solidarity finance systems. It provides rich and up-to-date information on the sector and answers any of your questions on this particular topic.

This webpage let our non French speaking friends to find out more about Social and Solidarity financial systems and their French specificities through the presentation of the network Finasol. Links towards similar European and international institutions will allow you to get more information on actions realised within this field in your country.

<http://www.finasol.org/International/anglais.asp>

Verite

Verité is an independent, non-profit social auditing and research organization established in 1995. Our mission is to ensure that people worldwide work under safe, fair and legal working conditions. Where Verité auditors identify exploitation of workers or health and safety violations in the workplace, we develop concrete steps to correct them through a combination of trainings for management and workers, education programs and remediation programs.

Verité has earned the respect of corporations, workers, labor unions and advocacy groups internationally. Our experience and links with non-governmental organizations (NGOs) span over 61 countries, with regionally-based coordinators overseeing operations throughout Asia, Latin America, Africa, the United States and Europe.

Verité's global expertise stems from knowledge of regional labor regulations and industries, extensive field networks, experience with local languages, cultures and socio-economic issues, enabling Verité and its NGO partners to accurately assess and improve factory conditions.

<http://www.verite.org/>

Social Investment Organization (Canada)

Established in 1989, the Social Investment Organization is a national non-profit organization dedicated to the advancement of socially responsible investment in Canada. It is funded primarily from membership dues and is accountable to its membership. The SIO has over 500 members across Canada, representing:

- Socially- and environmentally-screened mutual funds and their staff
- Financial institutions providing socially responsible investment products or operating according to corporate social responsibility principles

- Investment advisors providing advice and assistance on socially responsible investment
- Investment managers managing socially responsible investment assets
- Institutions investing according to socially responsible investment guidelines
- Retail investors investing according to socially responsible investment guidelines
- Non-governmental organizations and other groups with an interest in responsible investment

Their members manage funds on behalf of more than 200,000 Canadian investors.

The SIO works to raise the public profile of socially responsible investment; to reach out to other groups interested in socially responsible investment; to provide information to their members and the public and to take a leadership role in coordinating the development of the socially responsible investment agenda in Canada.

www.socialinvestment.ca

ASrIA (Asia)

Sustainable and Responsible Investment (SRI), also known as Socially Responsible Investment, is investment which allows investors to take into account wider concerns, such as social justice, economic development, peace or a healthy environment, as well as conventional financial considerations.

www.asria.org

Ethical Investment Association (Australia)

Ethical investment is the integration of personal values with investment decisions. It is an approach to investing that considers both profit potential and the investment's impact on society and the environment.

www.eia.org.au

Innovest Strategic Value Advisors

Mission:

Innovest Strategic Value Advisors is an internationally recognized investment research and advisory firm specializing in analyzing companies' performance on environmental, social, and strategic governance issues, with a particular focus on their impact on competitiveness, profitability, and share price performance.

Innovest provides its clients with three basic types of products and services:

- Industry, company and specialized reports
- Asset management sub-advisory services
- Custom research, consulting and portfolio analysis

www.innovestgroup.com

UK Social Investment Forum

- To inform, educate and provide a forum for discussion and debate for their membership and the public at large about issues and developments in the SRI field.
- To promote the understanding of SRI and to encourage the development of appropriate SRI practices and vehicles.
- To identify, encourage and help develop working models that demonstrate the effectiveness of SRI in protecting the environment, alleviating social hardship and stimulating sustainable economic development.
- To support and encourage a greater sense of social accountability amongst investors - both corporate and individual - and by financial institutions.
- To encourage and expect high ethical standards of professional conduct from their members and the public at large.
- To initiate and publish research for required changes in legislation and company policies and practices in order to enable SRI to develop rapidly and effectively both in the UK and internationally.
- To promote co-operation with European and other international SRI organizations through the exchange of information and ideas.

www.uksif.org/Z/Z/Z/home/main/index.shtml

Co-op America

Mission:

Co-op America, a national nonprofit organization founded in 1982, provides the economic strategies, organizing power and practical tools for businesses and individuals to address today's social and environmental problems. While many environmental organizations choose to fight important political and legal battles, Co-op America is the leading force in educating and empowering our nation's people and businesses to make significant improvements through the economic system.

www.coopamerica.org

Corporate Knights (Canada)

Corporatknights.ca is a website that works together with other Corporate Knight Inc. media facets to promote understanding on the growing space where business ethics is not an oxymoron. The aim of Corporate Knights is to be the primary resource for citizens (both human and corporations) on the topic of responsible business. To submit to the industry jargon, Corporate Knights' specific areas of coverage include Socially Responsible Investing (SRI) and Corporate Social Responsibility (CSR).

www.corporateknights.ca

European Sustainable and Responsible Investment Forum (Eurosif)

Eurosif is the pan-European stakeholder network for promoting and developing sustainable and responsible investment. The Eurosif board is represented by the Five Founding Social Investment Forums.

www.eurosif.info

Institutional Shareholder Services (ISS)

Institutional Shareholder Services, Inc. (ISS) is the world's leading provider of proxy voting and corporate governance services. ISS serves more than 950 institutional and corporate clients worldwide with its core business — analyzing proxies and issuing informed research and objective vote recommendations for more than 10,000 U.S. and 12,000 non-U.S. shareholder meetings each year.

www.issproxy.com

Pensions & Investment Research Consultants (PIRC)

www.pirc.co.uk

Initiatives

TBLI Conference

We are proud to present the fifth Triple Bottom Line Investing Conference! It is the world's largest international learning event dealing with sustainable investment. During the two-day event, the latest developments on screening, auditing, reporting, sri analysis, corporate citizenship, indexes and research will be covered. Anyone involved in the financial sector should attend. The TBLI 2003 conference will take place November 6 to 7, 2003 in Amsterdam, The Netherlands.

<http://www.tbli.org/>

SIF Industry Research Program (Moskowitz Prize)

The Social Investment conducts and sponsors a range of research on issues in socially responsible investment. A number of these reports are available online.

www.socialinvest.org/areas/research

Milken Institute Double Bottom Line Initiative

Creative ideas and financial innovations that expand access to capital stimulate economic development. Our work in this area applies financial innovations offering new approaches to business, public, social and environmental challenges.

Our research addresses capital access and wealth gaps across markets, and explores capital structures that expand business ownership and opportunity. We develop models for investments that generate both a financial and social return – the “double bottom line” – and track public-policy initiatives. Regularly released indices in this area provide usable benchmarks of progress. We also apply financial technology to environmental challenges such as developing options for monetizing ecosystem and environmental services that foster sustainable development worldwide.

Our Center for Emerging Domestic Markets (CEDM) supports the expansion of investment in traditionally undervalued and undercapitalized entrepreneurs, enterprises and communities, including women and ethnic business owners, urban cores, rural areas and low-income populations, through research and data collection. These entrepreneurs and customer bases represent the fastest growing segments of the U.S. economy and are driving forces behind growth and prosperity.

www.milkeninstitute.org/research/research.taf?cat=capacc

Initiative for Fiduciary Responsibility (The Global Academy)

Mission:

At the outset of the 21st century humanity faces diverse challenges and opportunities that are interrelated in the complex web of global life.

The mission of the Global Academy is to address those challenges and opportunities, which they believe are most central to the evolution of humanity and the natural world. By using a whole systems approach, the Academy works to deepen the understanding of these issues, to create models for change, and to support the implementation of these models into the mainstream of society. They believe this is the most effective strategy to build societies that are environmentally and socially sustainable, economically successful and technologically responsible.

The Global Academy recognizes the importance of partnerships and works closely with governments, business, civil society, educators scientists and the faith community around the world. In the spirit of partnership the Global Academy helps to build networks that allow all parties to learn from each other, share strengths, and create effective action.

The interdisciplinary educational work of the Academy is organized within six institutes, or areas of involvement, which focus on education programs and multi-stakeholder dialogues ranging from town hall meetings to international conferences, as well as media and online initiatives.

www.theglobalacademy.org

Institute for Responsible Investment (Boston College Center for Corporate Citizenship)

Every corporation is a citizen – an economic and social force touching many stakeholders. Increasingly, customers, employees, business partners and government demand that corporations take an active role in social, environmental and community concerns. That's why strategic corporate citizenship is more than good business – it's a business essential.

That's where we come in. The Center for Corporate Citizenship at Boston College can help you become a good corporate citizen and enjoy all the benefits of being one. We do it with executive education, convenings, consulting, research and benchmarking. Join us, and become part of an organization that understands the value of corporate citizenship and can support you in your efforts.

<http://www.bc.edu/centers/ccc/index.html>

Socially Responsible Investing (SRI)

Leadership Examples

Leadership Examples

Indexes

Citizens Index 300

All investment considerations are subject to Citizens' proprietary research, which examines all the factors - fundamental and social - that they believe affect a company's performance over time. The specific financial criteria they examine vary according to each investment strategy and approach. Their proprietary research is a balanced review of both qualitative and quantitative variables that contribute significantly to investment performance or risk.

www.citizenfund.com/sponsors-admins/philosophy/citizensindex.asp

Domini Social Index 400

They are pleased to present short social profiles for each of the 400 companies on the Domini 400 Social IndexSM and in the Domini Social Equity Fund's portfolio. This information is updated on a quarterly basis.

www.domini.com/dsi400/index.htm

Dow Jones Group Sustainability Indexes

The Dow Jones Sustainability Indexes are a cooperation of Dow Jones Indexes, STOXX Limited and SAM Group. By bringing together the expertise of two leading index providers and the world-renowned pioneer in sustainability investing, the DJSI family rests on a strong foundation to meet the growing market demand for professional, objective and reliable sustainability benchmarks.

SAM Indexes GmbH is the operating company for the Dow Jones Sustainability Indexes (DJSI). The managing director of SAM Indexes GmbH takes responsibility for the operation of the company. The DJSI World Index Design Committee and the DJSI STOXX Index Design Committee are responsible for all decisions affecting the indexes, including changes to the composition and methodology.

www.sustainability-index.com

FTSE/JSE SRI Index (South Africa)

FTSE and the JSE are working with the FTSE/JSE SRI Advisory Committee to create an SRI Index as an evolving means of meeting the complex needs of SRI and as a contribution to the debate about CSR. The intention is for the SRI Index to identify best practice in CSR and highlight those companies with good records in respect of CSR, and measure their share price performance. As such, the proposed methodology will have to be consistent, and universally applied.

<http://ftse.jse.co.za/sri>

FTSE4Good

FTSE Group is an independent company whose sole business is the creation and management of indices and associated data services. FTSE has no capital markets involvement. The company originated as a joint venture between the Financial Times and the London Stock Exchange.

www.ftse.com/ftse4good/index.jsp

Mutual Fund Companies

American Trust allegiance Fund

American Trust Company is dedicated to one purpose: to provide personalized investment management for their clients.

www.allegiancefund.com/AmericanTrust/aboutus.shtm

Aquinas Funds

Mission:

The Aquinas Funds and Aquinas Investment Advisers, Inc., which manages the Aquinas Funds and other activities for The Catholic Foundation, has two missions; to achieve its investment objectives ("profits") and to promote Catholic and family values as outlined by the National Council of Catholic Bishops' investment guidelines. To some, these two missions may seem incompatible or even a disadvantage for an investor seeking long-term capital growth and/or current income, however, they believe otherwise.

www.aquinasfunds.com/default.asp

Ariel Mutual Funds

At Ariel Capital Management, Inc., we've learned that one of life's greatest lessons also holds true when investing: slow and steady wins the race. Chasing the speedy and glamorous, the trendy or hot is not the surest way to reach a goal. Just like the fabled tortoise, the symbol of our firm, we value patience and persistence over the fleeting and flashy. Ours is not a tale of guesswork or speculation, but of diligence and focus.

www.arielmotualfunds.com

Calvert Funds – Investments That Make a Difference®

At Calvert, you will find a full family of mutual funds designed to help you achieve financial security while helping to build a sustainable world and protect their quality of life. Calvert has been in the mutual fund business for 25 years and manages more than \$8.5 billion in assets. Learn about their funds by reviewing fund profiles, annual reports and prospectuses and biographies of their portfolio managers.

www.calvertinvestments.com/funds.html

Citizens Funds

Since 1982, Citizens has been a thought leader in its approach to investment management, and socially responsible investing in particular. Their investment management process stems from the belief that good corporate citizenship can enhance company performance. This kind of thinking has differentiated them not only in the socially responsible investing (SRI) arena but also from other investment managers. Over the past two decades, they have been at the forefront of mainstream SRI methodology and traditional investment approaches, continuously refining their research process to make theirs one of the most rigorous and efficient in the business.

Established on the premise that effective corporate citizens make for the most effective companies, Citizens serves institutional clients and retail investors by investing in companies that they believe are fundamentally strong and socially responsible. Every security in their portfolios is subject to Citizens' proprietary research, which examines all the factors – fundamental and social – that they believe affect a company's performance over time. The goal is to conduct a fully comprehensive, integrated analysis of all the factors that they believe affect a company's stock performance.

www.citizensfunds.com/content/default.asp

Domini Social Investments, LLC

They are an investment firm specializing exclusively in socially responsible investing. They manage more than \$1.5 billion in assets for individual and institutional investors who wish to integrate social and environmental criteria into their investment decisions

www.domini.com

The Dreyfus Corporation

Today's investment climate is dynamic — markets are globalizing, investment options are multiplying, and investors, faced with an array of investment choices, expect service and demand performance. To meet this need, you need an investment partner with worldwide resources and experience, coupled with the investment performance records your clients require. The answer — Dreyfus.

The 1994 merger of The Dreyfus Corporation and Mellon Financial Corporation combined the investment expertise and service excellence of Dreyfus with the global resources of Mellon to create a money management giant that currently has \$612 billion in assets under management, including approximately \$179 billion in mutual fund assets as of June 30, 2003. Each of these investment managers is an acknowledged leader in its discipline. Together, under one organization, you have access to a powerful array of diverse investment capabilities and opportunities.

Through The Dreyfus Corporation, you have access to the investment management expertise backing Dreyfus and the Dreyfus Premier Family of Funds. This includes Founders Asset Management, a growth specialist mutual fund manager, and Mellon Institutional Investors, a singular source for a complete array of investment capabilities to manage all asset classes using tailored and disciplined investment processes.

www.dreyfus.com

Enterprise Group of Funds

The Enterprise Group of Funds provides a level of professional money management once reserved for only the largest institutional investors. Enterprise's different investment portfolios are managed by separate, independent asset management firms, each a recognized specialist in its own area of investment expertise. Selected based upon industry reputation and investment track record, each firm is continuously monitored by Enterprise and a national consulting firm to ensure that high standards of performance and professionalism continue to be met. Significantly, these firms primarily manage multimillion-dollar portfolios on behalf of corporations, nonprofit organizations and government entities that are able to meet minimum investment requirements of up to \$100 million. Collectively, these independent firms manage nearly \$1 trillion in investment assets as of June 30, 2003.

Enterprise's distinctive management strategy provides individual investors the benefits of diversification amongst multiple asset management firms along with the conveniences of exchange privileges and consolidated statements — all with a minimum investment of \$1,000 per fund.

www.enterprisefunds.com

Ethical Funds (Canada)

Ethical Funds® is Canada's most comprehensive family of socially responsible mutual funds with approximately \$2 billion in assets under management. Their family of Funds provides professional money management while investing in a way that reflects the commonly held values of Ethical Funds investors.

www.ethicalfunds.com

First Ontario Fund (Canada)

First Ontario Fund was launched in 1995 as a Labor Sponsored Investment Fund (LSIF) with the objective of achieving long-term capital appreciation while stimulating job creation through its investment in small to medium sized companies in Ontario. The Fund is sponsored by five trade unions namely, the United Steelworkers of America - District Six, the Communications, Energy and Paperworkers' Union of Canada, the Service Employees International Union, the Power Workers' Union, and the Brewery, General and Professional Workers' Union, as well as the Ontario Worker Co-operative Federation.

www.firstontariofund.com

Green Century Funds

The company that administers both Green Century Funds, Green Century Capital Management (GCCM), was founded and is wholly owned by non-profit environmental advocacy organizations.

In sharp contrast, most other fund families are managed by for-profit corporations which benefit individuals or other for-profit corporations.

As a result of GCCM's non-profit ownership, 100% of the profits earned through the management of the Funds belong to a partnership of Green Century's non-profit environmental advocacy organization founders.

These revenues will be used to further efforts to preserve and protect the environment -- efforts that include researching and advocating to reduce the use of toxic chemicals, filing lawsuits against companies that illegally pollute their air and waterways, and campaigning to increase recycling and reduce wasteful packaging.

www.greencentury.com

MEDA Sarona Global Investment Fund

The Sarona Global Investment Fund (Sarona) an initiative of **Mennonite Economic Development Associates (MEDA)** is a social investment fund with a focus on ventures that strengthen the economic prospects of the poor in low-income countries. By providing loans to local micro-credit lending institutions, Sarona enables poor people to improve their business operations. Sarona also invests directly in social ventures (entrepreneurs, cooperatives, associations, etc.) which benefit the poor, in sectors such as agricultural production, marketing, and trade.

<http://www.socialfunds.com/ci/profile.cgi>

Miller/Howard Investments Inc. (FlexParnters)

Miller/Howard Investments, Inc. was formed in 1984 as an institutional research boutique providing quantitative and technical research on large capitalization stocks to clients such as Fidelity, CIGNA., USF&G;, Hughes Aircraft, Delta Airlines, Delaware Management, John Templeton, Steinhardt Partners, George Soros, Federal Express, and many others. They began large-capitalization equities management in 1987, utilizing a proprietary market-driven computerized approach. In 1990 they completed their landmark study of the long-term returns of utilities as an asset class and began managing utility portfolios in early 1991.

www.mhinvest.com

MMA Praxis Mutual Funds (Mennonite Mutual Aid)

Since 1945, MMA (Mennonite Mutual Aid) has been working to serve the needs of people who want to put their faith and values into action. They've been serving people all over the country for decades

www.mmapraxis.com

Morley Fund Management

At Morley we believe companies most likely to grow consistently in the future will be those that are promoting, or benefiting from, sustainable economic development. This means development that meets the needs of the present, without compromising the needs of future generations.

Morley has proved its commitment to this view by recruiting one of Europe's leading SRI teams. This team has developed an excellent performance record based on a unique thematic approach driven by commitment to sustainable development.

www.morleyfm.com

Neuberger Berman

Our passion is deep-rooted: In 1939, renowned investor Roy Neuberger founded the firm to manage money for wealthy individuals. The firm thrived and grew, earning a reputation for excellent performance and integrity.

In 1950, Neuberger Berman became one of the first firms to offer a no-load mutual fund to individual investors, and our mutual fund family has grown alongside the private client business. In October 1999, our holding company, Neuberger Berman Inc., became a public company whose shares are listed on the New York Stock Exchange.

Today, Neuberger Berman manages \$63.7 billion in assets. We offer a wide spectrum of investment products for a full range of clients, both individual and institutional. We have created trust companies to help our clients build and protect their wealth across generations. Yet the core of our business remains the same as when we started: We are a money management firm. Our objective is to help our clients build wealth, produce income and preserve capital.

<http://www.nb.com/home/>

New Alternatives Fund, Inc

- They are a socially responsible Mutual fund concentrating their investments in
 - Environmental Investment
 - Renewable Energy
 - Fuel Cells
 - Recycling and Energy Conservation
 - Organic Foods

- They were the first Environmental fund, founded in 1982.
- Read the prospectus (pdf) before investing.
- They seek to be the greenest fund in America.
- The Fund invests in common stocks.
- They seek long term gain for their investors.
- The Fund's ticker symbol NALFX

www.newalternativesfund.com

Noah Fund

"The NOAH FUND invests not only with what [they] believe is a moral, spiritual and ethical standard, but also with an emphasis on low risk, high growth stocks. [They] realize that simply because one has a strong moral value system, that shouldn't hinder one's potential financial gain in the marketplace. However, be aware that these goals may not be achieved from a financial standpoint."

Thus their mission is to provide the investing public a viable alternative to other mainstream investing while maintaining a core set of values and beliefs.

www.noahfund.com

The Parnassus Fund

The Fund's principal investment objective is long-term growth of capital.

In contrast to Wall Street convention, the Parnassus Fund uses a contrarian investment strategy, investing in stocks that are out of favor with the financial community and are, therefore, undervalued. The Fund looks for companies whose financial strength and resilience suggest that their stock is likely to increase in value over time.

www.parnassus.com/Parnassus_Fund.html

Pax World Funds

The Pax World Funds seeks to enable persons of conscience to invest in keeping with their ethical values and to challenge corporations to establish and meet certain ethical standards.

To achieve these goals, the Pax World Funds use both financial and social criteria to select their holdings. They invest in securities, which not only present financial opportunity but also reflect the values of their investors.

www.paxfund.com

Portfolio 21

In the 21st century and beyond, bold new thinking will be required to transform their society into one that is in balance with nature. Portfolio 21 is a no load mutual fund for individuals and institutions committed to investing in a sustainable future. They believe that companies using sustainability principles as a core part of their business strategies are positioned to prosper in the future and can be more efficient and profitable today. Portfolio 21 concentrates on companies that have made a commitment to environmental sustainability and have demonstrated this commitment through their business strategies, practices and investments.

www.portfolio21.com

Security Benefit Group

Mission:

The Security Benefit Group of Companies is a financial services organization specializing in the sale and service of annuity, mutual fund and retirement plan products. The Company will maintain a strong financial position and consistent growth for the security and protection of its policyholders and customers.

www.securitybenefit.com

Sierra Club Funds

The Sierra Club Funds represent a unique investment option in the crowded mutual fund marketplace. Never before has an environmental organization granted access to its environmental evaluation criteria to a family of mutual funds.

The Sierra Club Funds will help to support the efforts of the Sierra Club. Forward Management has agreed to pay the Sierra Club for access to the criteria it maintains to identify companies that meet the Club's social and environmental guidelines. The Sierra Club uses those revenues to support objectives that include safeguarding wildlands, curbing urban sprawl, protecting national forests and working to stop global warming.

www.sierraclubfunds.com

Trillium Asset Management

Trillium Asset Management will be the leader in investing to achieve financial gain, social equity, and ecological sustainability. To bring this vision to life, they seek to:

- Provide superior products and services that fulfill the financial, social, and ecological goals of individual and institutional investors
- Explore and develop all possible means of social progress offered by the capital markets, and educate other concerned investors in their use

- Create a work environment that encourages personal development and growth, and in which ownership, responsibilities and rewards are broadly shared
- Support other persons and organizations working to build a just society and a better world

www.trilliuminvest.com

Walden Asset Management (U.S. Trust Company of Boston)

Walden Asset Management provides a wide range of investment services for institutional and individual social investors through actively managed portfolios, including: domestic core, value and growth; and small and large capitalization equity management services. They offer a number of unique services, including their Community Development Investment Service and Small Cap Innovations socially proactive small-cap portfolios. Boston Trust Investment Management, Inc., a wholly owned subsidiary of United States Trust Company of Boston, is the adviser to the Walden family of no-load, socially screened mutual funds.

www.waldenassetmgmt.com/investment/

Winslow Management Company

Winslow Management Company distinguishes itself from other investment management firms through its strategy of investing exclusively in environmentally effective companies. Winslow believes that by taking advantage of environmental opportunities or by avoiding environmental liabilities, these firms gain a competitive advantage over their peers. From its inception in 1991, Winslow has invested in companies whose impact on the environment is either beneficial or benign, and has proven its premise by producing competitive financial returns.

www.winslowgreen.com/about.html

Women's Equity Mutual Fund

The Women's Equity Mutual Fund (symbol: FEMMX) invests in public companies that advance the social and economic status of women in the workplace. It's called "socially responsible investing", and WEMF is proud to be a mutual fund that makes use of this progressive investment strategy.

www.womens-equity.com

Advisors, Money Managers and Other

Adams Harkness & Hill (AH&H)

- They are intimately connected with the right institutional market leaders and industry decision-makers
- Deep industry knowledge—they spot trends that make or break businesses
- The right positioning for your company
- Credibility and contact gained through 30 years of unbiased and objective research opens doors
- Senior team driving the engagement
- Commitment to long-term, quality focused client relationships

www.ahh.com

A.G. Edwards and Sons

At A.G. Edwards, you are their first priority. This client-first philosophy has defined them since their founding in 1887. The key to their trusted advice and exceptional service is their nationwide team of more than 7,000 professional financial consultants who work to form trusting, one-on-one relationships with you, regardless of whether you are a seasoned investor or just starting out.

www.agedwards.com

Dexia Asset Management (Belgium)

Dexia Asset Management combines the asset management, research and financial analysis activities of the Dexia financial group. Dexia Asset Management can boast considerable experience and know-how developed within Cordius Asset Management and Dexiam.

The following legal entities appear in the Dexia Asset Management group:

- Dexia Asset Management Luxembourg S.A.:
a subsidiary of Dexia Asset Management Luxembourg, entered in the Register of Companies under number R.C. CH-660-0585999-2. Given that it has no distinct legal identity, its Registered Office is that of the parent company, Dexia Asset Management Luxembourg S.A., namely 283 Route d’Arlon, L-1150 Luxembourg.
- Dexia Asset Management Luxembourg S.A., Geneva branch:
limited company under Luxembourg Law, Register of

www.dexia-am.com

First Affirmative Financial Network, LLC (FAFN)

First Affirmative Financial Network, LLC (FAFN) is an independent investment advisory firm registered with the Securities and Exchange Commission doing business in all 50 states. They support a nationwide network of investment professionals who specialize in serving socially aware investors. They provide consulting and asset management services for institutions seeking to integrate mission and values into investment strategy and decision-making.

FAFN is recognized as a pioneer and leader in the social investment industry. With proven experience, resources and commitment to help you achieve your financial goals, they can show you how to put your money to work in ways aimed at improving society for all.

www.firstaffirmative.com

Foursome Investments (UK)

Aim:

They aim to prove that it is possible to make an investment grade return on capital while providing a significant improvement to society and/or the environment, at the same time.

Their strategy is to seek investment opportunities that provide a positive correlation between financial performance and social/environmental performance, rather than businesses which achieve strong social/environmental performance at the expense of their financial performance, and vice versa.

It is their belief that there is an inherent positive social dimension to any business that acts within the bounds of the laws and regulations governing its operation. However, they seek businesses that do more than just pay their taxes and treat their employees fairly. They believe that there are a growing number of sectors where added social and/or environmental benefit can be derived from the provision of goods and services. Obvious examples of this can be seen within the environmental technology and services sectors, which encompass: renewable energies, environmental remediation technologies, recycling, clean water and sustainable resource management, to name a few.

By investing in and supporting the development of such companies, Foursome believes it is encouraging a growing trend of entrepreneurial businesses focussed on generating profitable answers to some of society's most challenging questions.

www.foursome.net/home.php

George Avenue/Noaber Foundation (Netherlands)

George Avenue is a private equity fund, initiated by the Noaber Foundation (www.noaber.com) investing in the Information and Communication Technology (ICT)

sector addressing the [Digital Divide](#) with focus on sustainable development for late(r) developing communities. This type of investment has besides a normal financial return of investment also a dedicated focus on the social benefits. Worldwide, large groups of people are disconnected from the "digital society". They are disabled in personal sense, giving them a disadvantage by using the (wireless) mobile technology. The Digital Divide is one of the biggest challenges in the future to get a more balanced and human society. Initiatives addressing the shadow side of the digital society lead also to opportunities in the ICT, which are hardly used currently. The term social venturing is also exchanged for the term "Venture Philanthropy" or "Risk Philanthropy". George Avenue has the aim to invest in these technologies for underprivileged people, sometimes also living in under-invested areas, build sustainable business around it and in this way integrate them better in the digital society. Currently a new initiative, broadening these social venture activities is founded;

http://www.noaber.com/index.cfm?site_id=8&l_id=2&tree_id=48&ApplicationServer=WIS

Global Environment Fund

Global Environment Fund (GEF) is an international investment management firm established in 1989 to invest in, and provide management support to, companies that make positive contributions to environmental quality, human health and the sustainable management of natural resources. Through its private equity investment funds, individually managed accounts and principal investment activities, GEF has completed more than 30 private equity or early stage investments in businesses operating in a broad array of economic sectors and in all major geographical regions of the world. Today, the firm's private equity portfolio includes controlling or major interests in fast-growing, entrepreneurial companies whose aggregate sales are in excess of \$2 billion.

www.globalenvironmentfund.com

Harrington Investments

Their mission is to provide highly personalized asset management services that reflect a commitment to superior financial results consistent with positive environmental, ethical and social change. HII's investment goals are to:

- Invest their clients' assets to achieve maximum economic and social goals using comprehensive social screening and fundamental analysis.
- Work diligently to develop a personal relationship with their clients and their financial professionals to assure consistency.
- Inspire confidence through dependable strategies, policies, and results.
- Exert influence on public corporations to encourage both economic and social accountability and responsibility.
- Contribute to their community through participation in non-profit organizations and encouraging their employees and clients to do the same.

www.harringtoninvestments.com/overview.html

Henderson/NPI

Henderson Global Investors is a dynamic participant in investment markets across the globe, providing a wide range of investment products and services to institutions and individuals in Asia Pacific, Europe, and North and South America. Henderson is the international investment management subsidiary of AMP, the international financial services group. It manages over £89 billion (as at December 2002) in assets and employs more than 1,600 people around the world.

www.henderson.co.uk

Innovest

One of Innovest's principal activities is working with our asset management partners and others to design and provide ongoing research support to a variety of "sustainability-enhanced" funds. Specifically designed as value-added overlay, Intangible Value Assessment™ can be used as a complement to, rather than a substitute for, existing investment strategies. It can, therefore, add value and risk-adjusted performance benefits to a wide variety of investment styles and products: active, passive, enhanced index, long-only, long-short, value, growth, sector-focused, and others. This allows Innovest and our partners to tailor a wide variety of products to the specific risk/return objectives of our clients:

<http://www.innovestgroup.com/>

Insight Investment Management

Insight Investment is the asset manager of the Halifax and Bank of Scotland group.

Our aim is simple - to bring confidence to investors. Our focused websites are designed to provide you with the information and services that are relevant to your investment needs.

<http://www.insightinvestment.com/>

ISIS Asset Management

www.isis.ch

Light Green Advisors

Light Green Advisors (LGA) is a Seattle-based investment advisor. LGA was founded to provide mainstream, environmentally aware investors with investment options that are environmentally and financially sound. LGA manages Standard & Poors 500™-based investments for environmentally conscious organizations and individuals interested in supporting companies with the best track records in their industries.

www.lightgreen.com

Natural Investment Services, Inc.

Natural Investment Services Inc. (NIS) provides financial consulting for individual investors and institutions. They also maintain the NIS Social Ratingsm, which evaluates the social characteristics of socially screened mutual funds.

[www.naturalinvesting.com/natural_investment_services%20 inc.htm](http://www.naturalinvesting.com/natural_investment_services%20inc.htm)

Progressive Asset Management

They are an established SRI leader: Progressive Asset Management, Inc. was established in 1987 as the first independent socially responsible investment broker/dealer. In 1999, Progressive Asset Management, Inc. formed a strategic alliance with Financial West Group - an investment broker/dealer with 60 offices and approximately 400 registered representatives - to establish the PAM Network.

www.progressive-asset.com/initiatives.html

Progressive Investment Management

Progressive Investment Management continues success in a competitive marketplace comes from the personalized service we provide to individuals and groups of investors. We develop portfolio management strategies based on each client's specific financial objectives and social concerns.

<http://www.progressiveinvestment.com/>

Protected Investors of America

Founded in 1934 by Churchill C. Peters, PIA is a full-service Broker Dealer and a federally registered Investment Advisor proud to provide personalized service to clients in the Greater Bay Area and surrounding communities, as well as throughout the United States and foreign countries.

<http://www.protectedinvestors1934.com/>

SKBA Capital Management

SKBA's mission is to bring the investor a strategic array of value-based investment solutions, built on a foundation of integrity, intelligence and innovation.

SKBA was founded in 1989 as an independent investment advisory firm. In 1999, SKBA became an affiliate of Convergent Capital Management (CCM), strengthening their resources and broadening their ability to serve their clients. SKBA provides asset management services with a value orientation. Their significant experience has been gained through years of management of institutional and individual assets.

SKBA is a recognized leader in value investing. Their investment philosophy and process are backed by professional ethics and sustainable performance. They consistently apply their investment discipline and emphasize risk-adjusted returns.

www.skba.com/index.html

Solstice Capital

Solstice is committed to investing 50% of its capital in information technology and 50% in the following socially responsive investments:

- Alternative Energy;
- the Environment;
- Life Sciences; and
- Education.

www.solcap.com

Summit Funds

In 1984, we raised our first fund, Summit Ventures I, totaling \$160 million. Since then, we have raised five more funds focused on private equity and later-stage venture capital. In 1999, we introduced the Summit Accelerator Fund, a venture capital fund focused on growing, profitable companies with capital needs of \$2 million to \$10 million. Most recently, we raised Summit Ventures VI, a \$2 billion fund for growing, profitable companies with capital needs of \$10 million to \$250 million. We have also raised a total of nearly \$500 million in two Summit Subordinated Debt Funds.

<http://www.summitpartners.com/about/ourfunds.aspx?mid=1&SID=104>

Sustainable Asset Management (SAM)

SAM Sustainable Asset Management is an independent asset management company headquartered in Zurich, Switzerland. Established in 1995, SAM was among the first asset managers to specialize in the field of sustainability-driven investments.

www.sam-group.com

VanCity Real Assets (Canada)

Van City is Canada's largest credit union, with \$8.2 billion in assets, 286,000 members, and 39 branches throughout Greater Vancouver, the Fraser Valley and Victoria. VanCity owns Citizens Bank of Canada, serving members across the country by telephone, ATM, and the Internet. Both Van City and Citizens Bank are guided by a commitment to corporate social responsibility, and to improve the quality of life in the communities where we live and work.

<http://www.vancity.com/menuId/50083>

Mission Related Investing & Shareholder Activism

Calpers

Mission:

Their mission is to advance the financial and health security for all who participate in the System. They will fulfill this mission by creating and maintaining an environment that produces responsiveness to all those they serve."

That statement was adopted by the Board of Administration to define the CalPERS mission in serving its 1.3 million members and retirees. It is backed by a **Strategic Plan, Guiding Principles** and **Core Values**.

www.calpers.ca.gov/invest/invest.htm

Investors Circle

Investors' Circle (IC) is a non-profit national network of angel and institutional investors, foundation officers and entrepreneurs who seek to balance financial, social and environmental returns. IC is dedicated to catalyzing the flow of capital to private companies that deliver commercial solutions to social and environmental problems. Each year IC sponsors venture fairs and a national conference, in addition to circulating deal flow to its members.

www.investorscircle.net

Religious Shareholders: ICCR, ECCR, TCCR

<http://www.iccr.org/>

<http://www.eccr.org.uk/>

<http://www.web.net/~tccr/>

Evangelical Lutheran Church in America, Board of Pensions

Mission:

The Board of Pensions' mission is to provide pension, health and other benefits and related services that will enhance the lives of pastors, rostered laypersons, lay employees, and their families, and support the well-being of congregations and institutions of the Evangelical Lutheran Church in America.

Vision:

They are the first place to call when you need a caring and responsive partner to meet your health care and retirement needs. Information at their fingertips enables them to assist members with knowledgeable, supportive service. They are advocates to ensure that the ELCA benefit programs meet the needs of the entire church.

www.elcabop.org

American Friends Service Committee (AFSC)

Mission:

The American Friends Service Committee is a practical expression of the faith of the Religious Society of Friends (Quakers). Committed to the principles of nonviolence and justice, it seeks in its work and witness to draw on the transforming power of love, human and divine.

They recognize that the leadings of the Spirit and the principles of truth found through Friends' experience and practice are not the exclusive possession of any group. Thus, the AFSC draws into its work people of many faiths and backgrounds who share the values that animate its life and who bring to it a rich variety of experiences and spiritual insights.

This AFSC community works to transform conditions and relationships both in the world and in ourselves, which threaten to overwhelm what is precious in human beings. They nurture the faith that conflicts can be resolved nonviolently, that enmity can be transformed into friendship, strife into cooperation, poverty into well-being, and injustice into dignity and participation. They believe that ultimately goodness can prevail over evil, and oppression in all its many forms can give way.

www.afsc.org

The Pension Boards – United Church of Christ

Mission:

The Pension Boards administers comprehensive employee benefits programs for the United Church of Christ, providing the highest standards of service, access and options to active and retired UCC clergy and lay employees.

www.pbucc.org

Commons Capital

Commons Capital LP is a new venture capital fund seeking strong financial returns as well as significant social and environmental impact. They invest in "double bottom-line" early-stage companies whose products; services or corporate cultures promote a sustainable economy by delivering market solutions to major social and environmental challenges.

www.commonscapital.com

Canadian Unitarian Social Justice and Investment Committees

CANADIAN UNITARIANS FOR SOCIAL JUSTICE (CUSJ) was formed in 1996 when about 70 members of five Unitarian Universalist Congregations and Fellowships of Greater Toronto met to discuss their concern with government cuts to social services. The founding group, of about 35 members, felt that more must be done by Unitarians within their churches and the greater community to protect the social programs that define Canada as a civilized and compassionate nation

www.cuc.ca/links/cusj.htm

Unitarian Universalist Service Committee

Grounded in Unitarian Universalist principles that affirm the worth, dignity and human rights of every person, and the interdependence of all life, the Unitarian Universalist Service Committee is a voluntary, nonsectarian organization working to advance justice throughout the world.

www.uusc.org

Catholic Healthcare West

Mission:

Mercy Medical Center Redding, St. Elizabeth Community Hospital, Mercy Medical center Mt. Shasta, sponsored by the Sisters of Mercy of Auburn, affirms the dignity of the human person and the sacredness of all life. They exist to foster the healing ministry of the Catholic Church and the Sisters of Mercy in Northern California.

In a spirit of collaboration among their healthcare facilities, physicians, other affiliated groups, and community organizations who support Judeo-Christian values, they will:

- Deliver compassionate, high quality, affordable health services
- Provide direct services to the poor and advocate on their behalf
- Create partnerships that improve community health.

www.mercy.org

Needmor Fund

Mission and Vision:

The mission of the Needmor Fund is to work with others to bring about social justice. They support people who work together to change the social, economic, or political conditions which bar their access to participation in a democratic society.

<http://www.needmorfund.org/>

Arete Corporation

Aretê Corporation has been managing venture capital funds focused on the needs and interests of the electric and gas utility industries since 1985. As manager of the Micro-Generation Technology Fund, Aretê has the ability to:

- Participate in the origination of ventures to address unfilled needs in the micro-generation market.
- Provide active management assistance to ventures in the Fund's portfolio.

www.areté-microgen.com

Various Pension Funds (CA,CT, NYC, NYS, AL)

Educational Foundation of America (EFA)

The Educational Foundation of America (EFA) Exists to improve individual lives and their surroundings through education and awareness, in hopes of bettering humanity and the world they inhabit.

www.efaw.org

Jessie Smith Noyes Foundation

Mission:

The Jessie Smith Noyes Foundation is committed to protecting and restoring Earth's natural systems and promoting a sustainable society by strengthening individuals, institutions and communities pledged to pursue those goals.

www.noyes.org

As You Sow Foundation

As You Sow is a non-profit organization dedicated to promoting corporate social responsibility. Our mission is to:

Promote progressive social and environmental policies at companies through the Corporate Social Responsibility Program. At CSRP, we represent the interests of socially concerned investors in dialogue with some of the largest and most prominent U.S. corporations.

Our Environmental Enforcement Initiative holds corporations accountable for complying with California's toxics labeling law. In 1986, California voters approved an initiative to address growing concerns about exposures to toxic chemicals. That initiative became the Safe Drinking Water and Toxic Enforcement Act of 1986, better known by its original name: Proposition 65.

<http://www.asyousow.org/>

Rose Foundation

Mission:

- Fostering community and environmental stewardship.
- Improving communications between businesses and their neighbors.
- Recognizing individual responsibility for the environmental consequences of personal actions.
- Forging positive links between environmental stewardship and sustainable job creation.
- Harnessing economic power to leverage environmental sustainability.
- Instilling respect for the inalienable rights protected by our nation's constitution and the essential human rights to clean air, clean water and individual dignity.

www.rosefdn.org

Nathan Cummings Foundation

The Nathan Cummings Foundation is rooted in the Jewish tradition and committed to democratic values and social justice, including fairness, diversity, and community. We seek to build a socially and economically just society that values nature and protects the ecological balance for future generations; promotes humane health care; and fosters arts and culture that enriches communities.

The Foundation owes its existence and inspiration to Nathan Cummings, who rose from impoverished beginnings to become the founder and guiding force of the Sara Lee Corporation. He inherited a spirit of sharing and a sense of community from his immigrant parents and transmitted these values to his children and grandchildren, who now contribute their time and energy to the Foundation.

<http://www.nathancummings.org/>

Shefa Fund

The Shefa Fund was established in 1988 to encourage American Jews to use their *tzedakah* (charitable resources) to create a more just society, and in the process, to transform Jewish life so that it becomes more socially conscious and spiritually invigorating. The Shefa Fund has grown to provide a range of progressive *tzedakah* financial services including socially responsible grantmaking, low-income community investing and funder education.

By mobilizing the Jewish community's abundance (*shefa*), we believe The Shefa Fund is building a more just world and a more vibrant American Jewish community. And, at the same time, we're providing our supporters with tremendous personal, spiritual and ethical profit.

<http://www.shefafund.org/>

FPCR

First Presbyterian Rowlett, TX is a member church of the The American Reformation Presbyterian Church (ARPC), a Presbyterian denomination begun in 1994.

<http://www.fpcr.org/>

Social Investing – Community Development Double Bottom Line Investing

General Overview

Social Investing – Community Development

General Overview

Information Resources (Books, Articles, Websites)

Market Creek Plaza Case Study

On the surface, Market Creek Plaza might look like a commercial development project, but it's much more. Beginning as a partnership between community residents and a family foundation to redevelop an old factory site, Market Creek Plaza has evolved, through the creativity of hundreds of community stakeholders, into a skill-and asset-building opportunity of such scale and focus that working and learning together has become its signature.

Developed through a network of eight working neighborhood teams, Market Creek Plaza has become about building community building skills, building assets, and building ownership while residents rebuild their neighborhoods.

www.marketcreek.com/

Ford Foundation CDFI Study 2002 by Brody, Weiser, Burns Consultants

“Strategies to Increase Community Development Finance” by Brody, Weiser, Burns Consulting for Ford Foundation, January 2002.

Contact kevinm@brodyweiser.com

“From SRI to community Investment” by Shari Berenbach

Berenbach, Shari *“From SRI to Community Investment: Integrating Disadvantaged Communities into the Capital Marketplace,”* Calvert Social Investment Foundation, draft document, 2002.

Contact shari.berenbach@calvert.com

SocialFunds.com Guide to Community Investing

SocialFunds.com is a website of SRI World Group, Inc., a news, research, and consulting firm that advises clients regarding sustainability investment issues and corporate responsibility practices.

Whether you are an institutional investor that is seeking to utilize sustainability criteria in your investment process or a medium- or large-sized company trying to identify the value of corporate responsibility practices, they can help.

www.socialfunds.com

National Community Capital Association (NCAA) CDFI Industry Reports

Vision

Our vision is a world where all people experience social, economic, and political justice and so have the opportunity and ability to act in the best interests of their communities, themselves, and future generations. In this world, all people are able to participate fully and equally in social, economic, and political life. In our society, however, millions of people experience injustice leading to persistent and worsening disparities in wealth and income levels. For economically disadvantaged people, lack of access to capital with which to pursue economic opportunities is a primary barrier to social engagement, economic well-being, and political participation.

Mission

As a catalyst for lasting social, economic, and political justice, National Community Capital helps institutions and individuals provide capital that increases resources and opportunities for economically disadvantaged people and communities.

<http://www.communitycapital.org/customer/home.php?cat=263&XCARTSESSID=9320b21e8a3908cbe76844e3f51ae6a6>

Pacific Community Ventures Website

PCV, a 501(c)(3) non-profit organization that manages two for-profit investment funds, offers entrepreneurs access to valuable business development resources through various programs and services.

Through its cornerstone service, the Business Advisory Program, PCV utilizes the vast experience and enthusiasm of experienced Bay Area professionals looking for meaningful, effective ways to contribute their own skills and resources to develop enterprises and strengthen low-income communities in the Bay Area. Advisors are matched with portfolio companies to provide business advice and guidance on issues related to the company's growth and development. Other services available to entrepreneurs in PCV's advised and financed portfolios include: Business Roundtables, CEO leadership forums, job placement partnerships and legal assistance.

<http://pacificcommunityventures.org/aboutus/index.html>

“Creating Capital, Jobs & Wealth in Emerging Domestic Markets” by G. Yago, B. Zeidman & B Schmidt (Milken Institute & Ford Foundation)

Yago, Glenn, Betsy Zeidman, Bill Schmidt. Creating Capital, Jobs & Wealth in Emerging Domestic Markets. January 2003.

www.milkeninstitute.org/pdf/ford_researchreport.pdf

“A Measure of the Microenterprise Industry” by FIELD

This report from Microtest draws on three years of performance data to offer a succinct description of trends in the microenterprise industry. The publication highlights what top performance looks like among industry leaders in such areas as scale, program quality, sustainability, etc. for practitioners who want to compare their performance with top-performing programs.

www.fieldus.org/publications/

“Equity with a Twist: The Changing Capital Needs of the Community Development Field.” by N.O. Andrews (Capital Xchange)

This paper argues for the creation of a new form of capital to fit the emerging needs of multi-purpose, highly successful community development organizations.

<http://www.brookingsinstitution.org/es/urban/capitalxchange/andrews.pdf>

“Increasing Investment in Communities” SIF Industry Research Program”

The Social Investment conducts and sponsors a range of research on issues in socially responsible investment.

<http://www.socialinvest.org/areas/research/>

ASPEN Institute Self Employment Learning Project (SELP)

The Aspen Institute’s Self Employment Learning Project (SELP), a long-term study of the impact study of the impact of micro-enterprise and self-employment programs, tracked 405 micro-credit borrowers from 1991 to 1997.

www.gfusa.org/newsletter/winter00/aspen.html

The Finance Project

The Information for Decision Making (IFDM) website is a comprehensive, Internet clearinghouse designed to assist policy makers, researchers, program administrators and other interested in topics related to improving results for children, families, and communities, and in effective program managements and governance. The collection includes more than 20,000 links and 10,000 electronic resources that provide users with a broad array of information on human service and management issues including policy analysis, research and evaluation results, technical assistance resources, promising state and local initiatives, financial and program data and legislative and regulatory guidance. These resources are organized into a series of 20 websites, accessible through IFDM, that include such sites as the Welfare Information Network (WIN), Making Wages Work, Managing for Results, and Out-of-School Time.

www.financeprojectinfo.org/ost/

Center for Community Change Website

The Center for Community Change is committed to reducing poverty and rebuilding low income communities. To do this, we help people to develop the skills and resources they need to improve their communities as well as change policies and institutions that adversely affect their lives. We believe that poor people themselves – through organizations they control – need to lead efforts to eliminate poverty.

www.communitychange.org/about/aboutccc.htm

“Going Local” by Michael Shuman

Shuman, Michael H. Going Local. Routledge, 2000

“A brilliant synthesis of a new economics based on local self-reliance, community control, and renewal cyclical flows of regional capital...” – Paul Hawken

“This book outlines a new brand of economics and politics that empowers local people to regain control over what happens in their communities” – The Utne Reader

“A constructive, clearly written book that counters blind globalism with insightful and responsible suggestions for how to root capital in viable, local communities.” – Herman Daly

www.amazon.com/exec/obidos/ASIN/0415927684/inktomi-bkasin-20/002-9115152-7719260

“Community Development Finance Institutions: A new Financial Instrument for Social & Physical Renewal” by UK Social Investment Forum

The UK Social Investment Forum (UKSIF) joins forces with the Treasury and banks to highlight a new source of help for enterprises turned down for loans by banks.

Small businesses were today urged by the Treasury to take advantage of an emerging breed of not-for-profit financial service companies that specialize in lending to organizations refused loans by banks.

A new report published by UKSIF highlights how Community Development Finance Institutions (CDFIs) offer small enterprises the opportunity to borrow at market cost even where they have been refused loans by banks.

Community Development Finance Institutions: a new financial instrument for social, economic and physical renewal, stresses the important role that these new sources of finance are already playing in making lasting differences to communities across the UK.

www.enterprising-communities.org.uk/cdfi-report.shtml

New Economics Foundation (UK) Social Investment Taskforce Reports

The Task Force was the initiative of the UK Social Investment Forum, in partnership with the New Economics Foundation and the Development Trusts Association. HM Treasury had observer status on the Task Force.

http://www.neweconomics.org/gen/z_sys_PublicationDetail.aspx?PID=41

<http://www.enterprising-communities.org.uk/>

RISE Double Bottom Line Investor Directory

This directory includes information about institutional investors that invest through equity vehicles in for profit ventures with the aim of achieving social or environmental impacts.

http://www.riseproject.org/cgi-bin/rise_build_search.pl

Capital Xchange website

Capital Xchange is a web-based journal dedicated to exploring the changing world of finance and capital. It intends to be a collection of provocative, accessible articles that public officials, private sector investors and lenders, non profit leaders, real estate practitioners and community organizations can rely on to spark their thinking.

http://planning.urban.uiowa.edu/fall2002_297/new_page_3.htm

<http://www.brook.edu/es/urban/capitalxchange.htm>

“Seizing Opportunities: The Role of CDC’s in Urban Economic Development” by Ford Foundation

In the midst of record-breaking economic expansion, the plight of low-income inner-city neighborhoods remains a complex and unresolved issue. In urban centers throughout the nation, officials struggle to attract private investment and enhance economic development in troubled communities. To address these challenges, community development corporations (CDCs) across the country are using a combination of government contacts, grassroots support, and financial acumen to increase jobs, attract private investment, and link troubled neighborhoods - and their residents - to the economic mainstream. Seizing Opportunities showcases the economic contributions of CDCs in five cities and examines the elements that make CDC-led projects successful. It also identifies barriers to accelerating the pace of community revitalization efforts.

www.fordfound.org/publications/recent_articles/seizing_opportunities.cfm

“CDFIs: Providing Capital, Building Community, Creating Impact” report by CDFI Data Project (CFED)

This document is an in-depth analysis of data collected by 512 CDFIs for Fiscal Year 2001. This publication is intended for those who would like a deeper understanding of the structure, customers, and impact of CDFIs.

<http://www.cfed.org/>

Office of the Controller of the Currency (OCC) Website

The bank regulatory organization with primary responsibility for regulation of the administrative and investment policies of national banks in the United States. It shares banking regulatory responsibility with a number of agencies, principally the Federal Reserve Board and the Federal Deposit Insurance Corporation.

<http://risk.ifci.ch/00012229.htm>

“The Mystery of Capital” book by H. De Soto

De Soto, Hernando. The Mystery of Capital. 1st ed. Basic Books. 2000. 1-276.

www.amazon.com/exec/obidos/ASIN/0465016146/ref%3Dnosim/lksmsubsite-sub-bk-asin-20/103-7757109-9371869

“The Elusive Quest for Growth” book by W. Easterly

Easterly, William. The Elusive Quest for Growth. MIT Press, 2001

www.amazon.com/exec/obidos/ASIN/026205065X/ref%3Dnosim/lksmsubsite-sub-bk-asin-20/103-7757109-9371869

“The Financing of Social Enterprises” by the Bank of England (UK)

http://www.bankofengland.co.uk/financing_social_enterprise_report.pdf

“Taking Stock: CDFIs Look Ahead After 25 years of Community Development” by M. Pinsky

This article suggests recommendations for how CDFIs can remain viable and best serve the needs of low income and minority communities in the years to come.

<http://www.brook.edu/es/urban/capitalxchange/article9.htm>

“A Double Bottom Line: Lessons on Social-Purpose Enterprise” by T. Proscio

This report contains observations from the Venture Fund Initiative, a six-month inquiry into the state of social-purpose enterprises and their prospects for growth. In this discussion, the phrase "social-purpose enterprises" refers mainly to businesses formed by nonprofit organizations to carry out their social mission -- whether by providing jobs and training for people in need, by generating excess income to support charitable activities, or some combination of the two.

<http://www.rockfound.org/display.asp?Collection=3&context=1&DocID=227&Preview=0&ARCurrent=1>

Resource Organizations

PolicyLink

To accomplish its mission, PolicyLink has assembled a diverse and experienced staff of professionals dedicated to the vision of developing and implementing creative policy initiatives. PolicyLink is headquartered in Oakland, California with a communications office in New York City. PolicyLink President Angela Glover Blackwell, a lawyer by training, has been an advocate for social change for over 30 years. She has served as the managing partner at Public Advocates, the founder-president of the Urban Strategies Council, and the senior vice president at The Rockefeller Foundation.

www.policylink.org/about.html

Corporation for Enterprise Development (CFED)

Mission:

The Corporation for Enterprise Development promotes asset-building and economic opportunity strategies -- primarily in low-income and distressed communities -- that bring together community practice, public policy, and private markets in new and effective ways.

Vision:

The Corporation for Enterprise Development envisions widely shared, sustainable economic well-being and an inclusive economy where everyone is fully engaged and appropriately rewarded.

www.cfed.org/

Community Development Venture Capital Alliance (CDVCA)

The Community Development Venture Capital Alliance (CDVCA) is the trade association for the rapidly growing community development venture capital industry. Formed in 1993 and incorporated as a not-for-profit in 1995, CDVCA promotes use of the tools of venture capital to create jobs, entrepreneurial capacity and wealth to advance the livelihoods of low-income people and the economies of distressed communities. The organization began when representatives of several community development venture capital funds met to discuss issues of common concern and share experiences and solutions to common problems. Realizing that they had been "reinventing the wheel" in different corners of the country, these funds established a regular forum in which they could exchange ideas. Since then, CDVCA has grown rapidly, now with more than 100 members, bringing together practitioners at all levels of experience and providing opportunities for them to learn, explore best practices, and gain resources for their work.

www.cdvca.com

Kenan Institute – Center for Community Capitalism at UNC

Center Director Michael A. Stegman, Ph.D. created the Center in 1997 as a forum for examining ways to use new electronic financial services and other business strategies to provide opportunities for saving and asset accumulation by poor working people. Stegman's interest was stimulated by his work as assistant secretary for policy development and research at the U.S. Department of Housing and Urban Development during the Clinton administration.

Since its inception, the Center has grown to a staff of six full-time professionals who engage in a variety of research and initiatives around these issues. The Center has received more than \$5 million in project funding from external sources.

<http://www.kenan-flagler.unc.edu/KI/commCapitalism/index.cfm>

Center for Social Development (Washington University in St. Louis)

Purpose:

The purpose of CSD is to chart new directions and study innovations in the domestic arena, particularly where such innovations are likely to have the greatest impact on public policy and private action. The domestic arena includes areas that are typically thought of as "social welfare" and "economic development" as well as broader aspects of family, community, and national life.

CSD brings together and provides a stimulating environment for people working on diverse social development topics. The approach is multidisciplinary, drawing on existing knowledge, study methods, and experts from many fields. The Center builds alliances and fosters new approaches to inquiry. Through innovation, research, networking, and policy development, CSD makes intellectual and applied contributions in social development theory, federal and state policy, and community projects.

<http://www.gwbweb.wustl.edu/csd/>

IDA Network

The IDANetwork serves as a gateway to the individuals, organizations, and ideas that are collectively shaping the Individual Development Account (IDA) field. As a member of this fast-growing, high-spirited community, you can exchange information and ideas about how to best structure IDA initiatives and policies that enable low-income families and individuals to save, build wealth, and contribute to the nation's continued economic growth.

www.idanetwork.org/

Enterprise Foundation

The Enterprise Foundation is building America, one community at a time. They work with partners to provide low-income people with affordable housing, safer streets and access to jobs and childcare.

They provide loans, grants and technical assistance to nonprofit organizations that are building and revitalizing local neighborhoods. They have a national network of 2,400 nonprofit organizations, public housing authorities and Native American Tribes in 860 locations.

www.enterprisefoundation.org

National Congress for Community Economic Development (NCCED)

The National Congress for Community Economic Development (NCCED) is the trade association and advocate for the community-based development industry. Founded in 1970, NCCED represents over 3,600 community development corporations (CDCs) across America. CDCs produce affordable housing and create jobs through business and commercial development activities. NCCED services the community development industry through public policy research and education, special projects, newsletters, publications, trainings, conferences, and specialized technical assistance.

- CDCs create employment opportunities through business development and job training.
- CDCs support the development of light industry and small business enterprises.
- CDCs produce affordable housing through new construction and rehabilitation.
- CDCs are owned and controlled by the residents affected by their programs.

www.ncced.org/

Investor's Circle

Investors' Circle (IC) is a non-profit national network of angel and institutional investors, foundation officers and entrepreneurs who seek to balance financial, social and

environmental returns. IC is dedicated to catalyzing the flow of capital to private companies that deliver commercial solutions to social and environmental problems. Each year IC sponsors venture fairs and a national conference, in addition to circulating deal flow to its members.

Since 1992, Investors' Circle has facilitated the investment of over \$85 million in 143 socially responsible companies and small venture funds. Our members invest in the following categories: environment, renewable energy, health, education, community development and minority- or women-led companies.

<http://www.investorscircle.net/>

FIELD (Aspen Institute)

FIELD a program of the Aspen Institute Microenterprise Fund for Innovation, Effectiveness, Learning and Dissemination. Recognizing that on-going experimentation and documentation are required to expand and strengthen the field of microenterprise development in the United States, FIELD's mission is to identify, develop and disseminate best practices, and to broadly educate policymakers, funders and others about microenterprise as an anti-poverty intervention.

www.fieldus.org/home

Local Initiatives Support Corporation (LISC)

LISC provides grants, loans and equity investments to CDCs for neighborhood redevelopment. When LISC begins a new program, National LISC matches locally-raised funds and gives that much more to the community for renovation. The CDC then designates the funds to a variety of projects that will best suit the neighborhood, and the renovation begins. Check out the details on their National Programs for more information.

www.liscnet.org/

The Brookings Institute on Urban & Metropolitan Policy

Mission:

The Brookings Institution is an independent, nonpartisan organization devoted to research, analysis, education, and publication focused on public policy issues in the areas of economics, foreign policy, and governance. The goal of Brookings activities is to improve the performance of American institutions and the quality of public policy by using social science to analyze emerging issues and to offer practical approaches to those issues in language aimed at the general public.

www.brook.edu/es/urban/urban.htm

National Community Capital Association (NCCA)

The National Community Capital Association is a national membership organization of community development financial institutions (CDFIs). National Community Capital's Member CDFIs provide capital, technical assistance, and development services to support the revitalization of economically-disadvantaged urban, rural, and reservation-based communities across the United States.

Created in 1986 as the National Association of Community Development Loan Funds or NACDLF, Association Members voted in 1997 to change the name of the organization to the National Community Capital Association to reflect the expanded membership. National Community Capital's membership includes community development credit unions, community development venture capital funds, and micro-enterprise lenders, as well as community development loan funds.

www.communitycapital.org/

Ford Foundation

The Ford Foundation is a resource for innovative people and institutions worldwide. Their goals are to:

- Strengthen democratic values,
- Reduce poverty and injustice,
- Promote international cooperation and
- Advance human achievement

This has been their purpose for more than half a century.

www.fordfound.org/

CEDWORKS – Centre for Community Enterprise (Canada)

Community economic development (CED) puts local people in charge of their ways of life and work. Communities - neighborhoods, towns, First Nations, and other people pressed to the margins by the modern economy - use CED to restore their hope, pride, and power. But it takes skill: community organizing, research, and planning; business and organizational development; finance; and networking. And the clincher is to ensure that development is sustainable both ecologically and commercially.

www.cedworks.com/

The Canadian CED Network

The Canadian Community Economic Development Network (OCEDNet) is a national member based, democratic organization. They are a registered charitable non-profit organization.

The membership of CCEDNet is made up of Community Economic Development (CED) community-based organizations and practitioners from every region of the Canada. Their members bring urban, rural and northern experience and a diverse range of community economic development expertise to the work of CCEDNet.

Mission:

Their mission is to promote and support community economic development for the social. Economic and environmental betterment of communities within Canada.

<http://ccednet-rcdec.ca/>

FundingPost

Mission:

To showcase entrepreneurs to interested investors, while increasing their exposure and shortening their time to capital.

For over two years FundingPost has worked to bring entrepreneurs together with leading investors worldwide. They believe that it is important to reach investors in every medium possible - both online and offline.

Through their successful Venture Capital Events, Venture Guide Publications, and their online Venture Exchange, FundingPost has had the opportunity to work with thousands of Angel and Venture Capital investors representing over \$28.26 Billion.

www.fundingpost.com/

Financial Innovation Roundtable (FINIR)

The goal of the Financial Innovation Roundtable is to extend innovation to the financial institutions and instruments needed for community development across the United States. The Roundtable includes 90 members in the field of finance and related areas. Participants include leaders from conventional financial institutions including banks, mortgage companies, insurance companies and investment firms as well as leaders from public agencies, non-traditional lenders, foundations, pension funds, religious institutions and universities.

www.finir.org

Community Development Finance Association (CDFA)

The creation of a trade association for CDFIs was one of the recommendations made by the Social Investment Task Force in its report, ENTERPRISING COMMUNITIES: WEALTH BEYOND WELFARE, which was presented to the Chancellor of the Exchequer in October 2000.

www.cdfa.org.uk

Microenterprise Development institute (MDI)

The Microenterprise Development Institute at the School of Community Economic Development, Southern New Hampshire University (SNHU), was founded in 1999 and distinguishes itself as a program dedicated to building both financial and social capital. The challenges to practitioners in the field of microenterprise is to find a balance between these two aspects that will stimulate sustainable growth. The Microenterprise Development Institute-New Hampshire provides an intensive learning opportunity to explore these with fellow practitioners and experts from around the world.

www.mdi-nh.org

Capital Markets Access Program

The goal of the Corporate Partnership Program (CPP) is to link businesses with CDCs resulting in investment in CDC areas. The CPP staff has been working hard to develop specific tools which will encourage businesses to make these investments. Particularly because of the negative image associated with emerging markets, it is often difficult for investors to raise capital. Accordingly, the CPP has launched several initiatives to provide improved access to capital for businesses which want to invest and operate in CDC areas.

<http://www.ncced.org/cpp/accessCap.html>

Nonprofit Finance Fund (NFF)

Vision:

The vision of Nonprofit Finance Fund (NFF) is of a strong, well-capitalized and durable nonprofit sector that uses capital effectively to support the highest aspirations and most generous impulses of people and communities. NFF is a leader in achieving this vision, investing to build effective, innovative organizations that contribute to social and economic justice, artistic expression, education, and the healing of body and spirit. NFF believes that viable communities require such organizations.

Mission:

NFF's mission is to serve as a development finance institution for nonprofit organizations, working to fill their overall need for capital through financing and advisory services. NFF supports its nonprofit clients' multi-faceted contributions to communities, advances community and economic development goals, and works to fill the overall need for capitalization of organizations in this sector.

www.nonprofitfinancefund.org

CDFI Coalition

Formed in 1992 as an ad-hoc policy development and advocacy initiative, the Coalition of Community Development Financial Institutions (CDFI Coalition) is the lead national organization in the United States promoting the work of community development financial institutions (CDFIs). Through its twelve member organizations, the Coalition represents CDFIs working in all 50 states and the District of Columbia. This national network of CDFIs includes community development loan funds, community development banks, community development credit unions, microenterprise lenders, community development corporations and community development venture capital funds. The CDFI Coalition coordinates industry wide initiatives to increase the availability of capital, credit and financial services to low-income communities across the nation.

<http://www.cdfi.org/>

Commbuild.org Website

Comprehensive Community-Building Initiatives (CCIs) are neighborhood-based efforts that seek to improve the lives of children and families and the communities in which they live. Individual CCIs take different forms and structures, yet all are guided by principles of comprehensiveness and community building.

www.commbuild.org

Fannie Mae Foundation

Mission:

The Fannie Mae Foundation creates affordable homeownership and housing opportunities through innovative partnerships and initiatives that build healthy, vibrant communities across the United States. The Foundation is specially committed to improving the quality of life for the people of its hometown, Washington, D.C., and to enhancing the livability of the city's neighborhoods.

www.fanniemaefoundation.org

First Nations Oweesta Corporation

First Nations Oweesta Corporation (FNOC), a subsidiary of First Nations Development Institute, was launched in 1999 to assist tribes and Native communities with loans, investments, technical assistance, training and community development information.

Mission:

- To enhance the capacity of Native tribes, communities and people to access, control, create, leverage, utilize and retain financial assets; and
- To provide access to appropriate financial capital for Native development efforts

www.firstnations.org/fnoc/fnoc.htm

The Columbia RISE Project on Double Bottom Line Investing

Launched in early 2002, RISE is a project at Columbia Business School whose mission is to study and disseminate knowledge about the markets, metrics and management of for-profit and nonprofit social enterprise and social venturing.

RISE is sponsored within Columbia Business School by the Social Enterprise Program and the Eugene M. Lang Center for Entrepreneurship.

<http://www.riseproject.org/>

Microfinance Network

The MicroFinance Network (MFN) is a global association of leading microfinance practitioners. The members of the Network are committed to improving the lives of low-income people through the provision of credit, savings and other financial services. While the members serve their clients using many different methodologies, they believe in employing commercial principles to achieve sustainable and profitable financial institutions. Such institutions can reach a large number of clients who would otherwise not have access to affordable financial services.

Mission:

- Promote the commercial approach to microfinance among policy makers, donors and practitioners.
- Provide Network members with access to information and expertise that increases knowledge of best practices in microfinance.
- Facilitate the transformation of microfinance institutions into regulated financial institutions.

www.bellanet.org/partners/mfn/

The Microfinance Information eXchange (TheMIX)

The MIX MARKET™ is a global, web-based, microfinance information platform. It provides information to sector actors and the public at large on microfinance institutions (MFIs) worldwide, public and private funds that invest in microfinance, MFI networks, raters/external evaluators, advisory firms, and governmental and regulatory agencies. The MIX Market seeks to develop a transparent information market to link MFIs worldwide with Investors and Donors and promote greater investment and information flows.

<http://www.themix.org/en/index.html>

Initiatives

National Community Development Initiative (NCDI)

The National Community Development Initiative (NCDI), formed in 1991, has invested over \$150 million in CDCs and related community development activities in 23 cities. This executive summary highlights findings from an ongoing study of the impact of this investment on CDCs and the local systems that support them.

www.urban.org/pubs/comdev90/summary.html

Community Investing Campaign (Social Investment Forum and Co-op America)

Across America and around the world, many communities lack affordable housing, childcare, healthcare and jobs that pay a living wage.

Community investing is financing that creates resources and opportunities for economically disadvantaged people in the U.S. and overseas who are underserved by traditional financial institutions.

www.communityinvest.org/

CDFI Data Project (MacArthur Foundation and Ford Foundation)

The CDFI Data Project (CDP) is a collaborative initiative to create a data collection and management system that produces high quality, comprehensive data for and about the community development finance field. The mission of the CDP is to ensure access and use of data to improve practice and attract resources to the CDFI field. The data—and the system to collect and manage it—will bolster capacity building, policy making and research to strengthen the development finance field, as well as individual community development financial institutions (CDFIs). The CDFI Coalition is an active participant in the leadership of the CDP.

<http://www.cdfi.org/cdfiproj.asp>

Wholesale Intermediary Initiative - UK (Social Brokers, the Big Issue and Bank of Scotland)

Research into the feasibility of a wholesale fund for the sector, funded by the Phoenix Fund, was finalised in April 2002. The study concluded that the sector is not yet sufficiently credit worthy to attract fully commercial capital, however both CDFIs and banks expressed interest in the concept of a specialised wholesaler. It was felt that an interim or transitional wholesaler, that could become fully commercial as the sector developed, could provide a valuable catalyst towards a more commercially sustainable future for the CDF sector.

A partnership, including Social Brokers, the Big Issue and Bank of Scotland, has started to work on the development of such a transitional wholesaler with the expectation of launching it before the end of the year.

<http://www.enterprising-communities.org.uk/update4.shtml>

The Sustainable Development Reporting Project (WBCSD)

The WBCSD has long been working on issues of accountability, reporting and transparency.

Our most recent venture in this area is an in-depth examination of sustainable development reports. Our Sustainable Development Reporting project was launched in 2000 to support WBCSD member companies and the wider business community in moving from environmental to sustainable development reporting.

The results of this study are captured in our recently released Sustainable Development: Striking the Balance. The report covers three main areas:

- a step-by-step guide that helps companies to improve or develop their reports
- recommendations on how to bridge the gap between the information needs of the financial community and the reporting practices of companies
- insight into the debate on the standardization of reporting formats

http://www.wbcd.ch/DocRoot/GGFpsq8dGngT5K56sAur/20030106_sdreport.pdf

Social Investing – Community & Double Bottom Line Investing

Leadership Examples

Leadership Examples

Community Development Nonprofits and Loan Funds

USA

Alternatives Federal Credit Union

Alternatives is dedicated to economic justice.

Alternatives Federal Credit Union is a Community Development Financial Institution, dedicated to building wealth and creating economic opportunity for underserved people and communities.

<http://www.alternatives.org/>

New Communities Corporations (Newark, NJ)

The Community Investment Department works to maintain and expand access to capital and housing for low-income inner city residents who are underserved by traditional financial institutions. The three components of the department each play a role in achieving this goal. The New Community Federal Credit Union provides user-friendly consumer banking services. The New Community Development Loan Corporation (NCDLC) makes capital available for growing businesses and start-up ventures. Garden State Affordable Housing provides equity investments for the construction of affordable housing through the New Jersey Housing Opportunity Funds, a statewide housing equity pool.

<http://www.newcommunity.org/whatwedoframe.htm>

National Community Investment Fund (NCIF)

Mission:

To increase the number and capacity of domestic, depository institutions that are both effective agents of local community development and sound financial institutions.

www.ncif.org

Oikocredit (formerly Ecumenical Development Cooperative Society)

Mission:

Oikocredit, as a worldwide cooperative society, promotes global justice by challenging people, churches and others to share their resources through socially responsible investments and by empowering disadvantaged people with credit.

www.oikocredit.org

Pacific Community Ventures

PCV, a 501(c)(3) non-profit organization that manages two for-profit investment funds, offers entrepreneurs access to valuable business development resources through various programs and services.

Through its cornerstone service, the Business Advisory Program, PCV utilizes the vast experience and enthusiasm of experienced Bay Area professionals looking for meaningful, effective ways to contribute their own skills and resources to develop enterprises and strengthen low-income communities in the Bay Area. Advisors are matched with portfolio companies to provide business advice and guidance on issues related to the company's growth and development. Other services available to entrepreneurs in PCV's advised and financed portfolios include: Business Roundtables, CEO leadership forums, job placement partnerships and legal assistance.

<http://pacificcommunityventures.org>

Community Health Facilities Fund (CHFF)

CHFF was established in 1991 through the sponsorship of the National Council for Community Behavioral Healthcare and the International Association of Psychosocial Rehabilitation Services. Funded by the Robert Wood Johnson Foundation, CHFF's mission is to improve access to capital for community-based behavioral healthcare organizations throughout the United States. Their financial partners are also dedicated to that mission and directly invest their funds to make loans.

CHFF's financing program is designed so that each borrower is financed according to their own needs. The tax-exempt bonds that will be issued on your behalf will be unrated and will be purchased by their financial partners.

www.chff.org

Partners for Common Good

Mission:

The mission of Partners for the Common Good is drawn from John XXIII's Encyclical Mater et Magistra and its teachings on the "common good." The "common good" as described in Mater et Magistra is:

To provide employment for as many workers as possible ... to make accessible the goods and services for a better life to as many persons as possible ... to ensure that the advantages of a more humane way of existence not merely subserve the present generation, but have regard for future generations as well.

PCG accomplishes its mission by providing access to capital to community based organizations that build strong and healthy communities.

PCG's business objectives are to:

- Broaden interest and involvement in the community investment movement.
- Provide opportunities for faith-based and socially motivated investors to dedicate a portion of their resources to work in communities.
- Model innovative and emerging strategies for the production of goods and services and building communities.
- Expand the overall capital base to support community-based initiatives.

www.pcg21.org/about/missionhistory.asp

First Nations Development Institute

Mission:

They are a Native American nonprofit of 20 years' standing. Their primary mission is to promote culturally appropriate economic development by and for Native peoples; to this end they serve as an educator, advocate, researcher, funder, fundraiser, and purveyor of information, resources and ideas. They are preparing a better future for Native Americans, and your understanding is part of their provision for getting from here to there.

www.firstnations.org

Seedco

Founded in 1986, Seedco provides financial and technical assistance, and management support, for the community-building efforts of nonprofit organizations and small businesses in targeted disadvantaged communities throughout the United States. Working in partnership with local community organizations, universities, and other local and national groups, Seedco develops and supports wide-ranging initiatives that support working families, promote community economic development, and strengthen community-based nonprofits. Seedco's approach focuses on increasing its community partners' capacity to implement high-impact projects that build community and individual assets.

www.seedco.org

Boston Community Capital

Mission:

Boston Community Capital is a community development financial intermediary whose mission is to create and preserve healthy communities where low-income people live and work. They do this by investing in projects that provide:

- Affordable housing
- Good jobs
- Needed goods and services
- New opportunities for people who have been locked out of the economic mainstream

The capital that Boston Community Capital invests comes from socially concerned investors and donors -- individuals, religious organizations, banks, foundations and corporations.

www.bostoncommunitycapital.org

Nonprofit Finance Fund (NFF)

Nonprofit Finance Fund (NFF) is a nonprofit organization that serves the business needs of other nonprofits nationwide. We provide financial services -- chiefly loans -- and advisory services to help you meet your long-term strategic goals. We provide the kind of money and advice that nonprofits typically can't get from other sources.

<http://www.nonprofitfinancefund.org/>

Cascadia Revolving Fund

Cascadia is a private, nonprofit community development financial institution that provides loans and technical assistance to entrepreneurs and community building organizations in Washington and Oregon who have been unable to access traditional financing and support.

Cascadia's goal is to help entrepreneurs start and grow successful businesses, in an effort to bring much needed jobs and economic prosperity to distressed urban and rural communities in the Northwest.

Loans are made to:

- businesses owned by low-income people, women, immigrants, and minorities
- businesses located in distressed urban and rural communities
- businesses with a significant potential for job creation
- businesses that work to preserve or restore the environment
- community building organizations.

Cascadia also has a specific program to assist child care providers.

www.cascadiafund.org

Community Bank of the Bay

Mission:

As a community development bank, Community Bank of the Bay's mission is to promote economic prosperity and self reliance in low and moderate income areas while operating a safe and profitable bank. The Bank's lending activities are designed to improve capital access in credit-deprived Bay Area neighborhoods, thus helping to revitalize those communities.

Community Bank of the Bay is a California State chartered, FDIC insured commercial bank, which operates under the same regulatory framework as other commercial banks.

www.communitybankbay.com

Leviticus 25:23 Alternative Fund, Inc.

Community Development Financial Institutions or CDFIs are financial institutions that have community development as their primary mission and that develop a range of strategies to address that mission.

www.communitycapital.org/community_development/index.html

Mercy Housing

Mission:

To create and strengthen healthy communities through the provision of quality, affordable, service-enriched housing for individuals and families who are economically poor.

Vision:

Mercy Housing, in collaboration with others, will work to alleviate poverty and improve the quality of life of residents and neighborhoods through the development and operation of affordable housing that is community-based and resident-focused.

www.mercyhousing.org

Self-Help Credit Union

Self-Help's work is based on the belief that ownership allows people to improve their economic position. Owning assets, such as a home, can enable a family to send a child to college, start a business, or weather a financial crisis. Ownership provides communities with a solid foundation on which to grow and prosper. Lack of assets limits choice and opportunity.

In addition to direct lending, Self-Help acts as a laboratory for economic development—experimenting to find out what works and advocating for change in the public and private sectors.

Their impact has been felt across the nation. As a widely-recognized model for community development finance, they share their knowledge and experience with fellow community development organizations, legislators, government agencies, and others.

www.self-help.org

Shared Interest (South Africa)

Shared Interest is a co-operative lending society with around 8,350 members. Their members are aware of the problems faced by producers in the Third World in getting access to credit. They are willing to invest part of their savings in order to help producers pay for the costs of producing their goods until the goods can be sold to consumers.

They were established in 1990 and they have grown rapidly since then to reach total share capital of £18 million.

www.shared-interest.com

Southern Development Bancorporation

Southern Development Bancorporation's family of companies offers a full line of financial products and development services to residents in rural Arkansas and the Delta region of Mississippi including: bank credit, housing development, small business assistance, "non-bank" lending, work force training, asset building and advocacy for the poor.

www.southerndevelopmentbancorp.com

Rudolf Steiner Foundation

RSF is an innovative charitable organization that uses several financial vehicles to fulfill its charitable purposes. In addition to its donors, RSF's ability to accomplish its mission rests on the generosity of those who make loans to RSF-their "investors". By investing in RSF, you invest and share in the accomplishment of their charitable mission.

www.rsffoundation.org/nav.htm

Illinois Facilities fund (IFF)

Mission:

The Illinois Facilities Fund is a nonprofit financial institution which assists Illinois nonprofits through loans, facilities planning and facilities development.

Vision:

The IFF will become the pre-eminent financial and development services provider for undercapitalized nonprofits in Illinois. The IFF will continue to emphasize its efforts in

child car and public policy to improve the quality of life for underserved people in Illinois.

www.iffund.org

Access Capital Strategies

Access Capital Strategies is a registered investment advisor. The firm currently manages the Access Capital Strategies Community Investment Fund ("the Fund") which is specifically designed to support community development activities in areas of the United States designated by the Fund investors. The Fund primarily invests in AAA rated debt securities whose underlying activities support affordable housing, education, small business development and job creation targeted to low and moderate income individuals.

<http://www.businesscollaborative.com/AccessCapital.html>

Microenterprise Loan Program of the North Carolina Rural Economic Development Center

In operation since 1989, the Rural Center's nationally award-winning Microenterprise Loan Program provides rural people with small business loans to help them become self-sufficient through business ownership.

The Microenterprise Loan Program works with individuals who have sound ideas for starting or expanding a small business but do not qualify for bank loans. These individuals may include women, members of minority groups, people with low incomes and limited assets, and people who live in rural areas

<http://www.ncruralcenter.org/grants/micro.htm>

Nebraska Microenterprise Partnership Fund

Mission:

Recognizing a need to support programs that serve Nebraska's small and micro businesses, it is the mission of the Nebraska Microenterprise Partnership Fund to mobilize, allocate, leverage and link strategic local, state and national resources with community-based organizations that provide financial and technical assistance to Nebraska's businesses.

Vision:

The Nebraska Microenterprise Partnership Fund envisions a Nebraska where every small and micro business owner has the opportunity and resources to realize his or her potential as a business owner.

www.nebbiz.org

Mennonite Economic Development Associates (MEDA)

Mission:

The mission of MEDA is to bring hope, opportunity and economic well being to low-income people around the world through a business-oriented approach to development.

<http://www.meda.org/index.html>

Working Capital

The Working Capital Fund works with a group of leading African American, Asian/Pacific Islander, Latino and Native American arts organizations. Primary consideration is given to applicants that have reached a critical juncture in their institutional development and are actively seeking long-term sustainability of their artistic achievements. Equally important, applicants demonstrate readiness to undergo the organizational, programmatic and/or economic changes necessary to achieve this goal.

<http://www.workingcapitalfund.org/background/>

CRA Qualified Investment Fund

Through the success of our management of The CRA Qualified Investment Fund, CRAFund Advisors has shown that a portfolio of investments with wide reaching community development impact can offer competitive returns with high credit quality and liquidity. And for banks seeking CRA credit, these investments can measure up to the strict guidelines of government regulators.

<http://www.crafund.com/>

Community Reinvestment Fund (CRF)

Community Reinvestment Fund (CRF) is the national leader in bringing capital to community-development lenders through the secondary market for loans. Started in 1989, CRF has injected hundreds of millions of dollars into low-income and economically disadvantaged communities across the country to help stimulate job creation and economic development, provide affordable housing and construct community facilities.

CRF is a nonprofit organization, headquartered in Minneapolis, MN. It is supported primarily by its own revenue-generating activities, including loan purchasing, loan servicing and training and technical assistance. CRF gets further support from foundations, corporations and individuals that want to use their social-purpose investments in a way that maximize their effectiveness. These dollars help CRF continue to expand its activities.

www.crfusa.com/

The Enterprise Social Investment Corporation (ESIC)

The Enterprise Social Investment Corporation (ESIC), a subsidiary of the Enterprise Foundation, works with partners to finance, develop and acquire affordable housing and other community development initiatives in underserved neighborhoods across the country. ESIC undertakes a variety of initiatives in fulfillment of its mission.

www.enterprisefoundation.org/esic/aboutus/index.asp

Oxfam America

Oxfam America is dedicated to finding long-term solution to poverty, hunger, and social injustice around the world. They work to eliminate the root causes of social and economic inequities by challenging the structural barriers that foster conflict and human suffering and limit people from gaining the skills, resources, and power to become self-sufficient.

<http://www.oxfamamerica.org/art1716.html>

Low Income Housing Fund (LIHF)

Community Development Financial Institutions or CDFIs are financial institutions that have community development as their primary mission and that develop a range of strategies to address that mission.

<http://www.lihf.org/site/about/about.htm>

International

Canadian Alternative Investment Co-operative

The Canadian Alternative Investment Cooperative (CAIC) was formed in the early 1980's by a number of religious communities who wanted to pool their resources in order to make investments that support positive social change and promote alternative economic structures.

CAIC has since grown to fifty-one members with a lending pool of approximately \$7 million invested in worthwhile projects across Canada. Their borrowers are building alternative economic structures that are supportive of worker cooperatives, disadvantaged peoples and the environment.

www.caic.ca/

VanCity Capital Corporation (Canada)

VanCity Capital is a BC-based investment firm that specializes in growth financing.

Founded in 1998 as a wholly owned subsidiary of VanCity Credit Union, VanCity Capital provides growth capital—known also as subordinated debt and mezzanine financing—to smart, fast-growing small to medium-sized BC-based organizations.

Their solid reputation has been built on their innovative, flexible approach to financing, their straightforward deal structures, and on the positive results they help yield for their clients. Accordingly, VanCity Capital is looked to by businesses, which strive to be the best in their sectors, and by co-operatives and not-for-profits that seek to make more of a difference in their communities.

The VanCity Capital team is comprised of experienced, forward-thinking investment professionals that lead the market in securing results-based deals. Their knowledgeable team, low overhead, streamlined credit process and their commitment to the BC economy are just a few more reasons why VanCity Capital is the right choice to finance your growth.

www.vancitycapital.com/aboutus/aboutVCC.html

Pan Canadian Community Futures Network

Community Futures Development Corporations (CFDCs) support community economic development by assisting Ontario's rural and northern communities to strengthen and diversify their economies.

As community-based, non-profit organization, CFDCs are run by a board of local volunteers. They are staffed by professionals who encourage entrepreneurship and the pursuit of economic opportunities.

www.communityfutures.ca/home/index-eng.html

National Community Capital Association (Canada)

The National Community Capital Association is a national membership organization of community development financial institutions (CDFIs). National Community Capital's Member CDFIs provide capital, technical assistance, and development services to support the revitalization of economically-disadvantaged urban, rural, and reservation-based communities across the United States.

Created in 1986 as the National Association of Community Development Loan Funds or NACDLF, Association Members voted in 1997 to change the name of the organization to the National Community Capital Association to reflect the expanded membership. National Community Capital's membership includes community development credit unions, community development venture capital funds, and micro-enterprise lenders, as well as community development loan funds.

www.communitycapital.org/

Blue Orchard Finance (Switzerland)

BlueOrchard Finance s.a. is a microfinance investment consultancy. Their mission is to promote private investments in projects and enterprises contributing to the sustainable development of micro-entrepreneurship in emerging economies. Their action is grounded in the philosophy that development must be beneficial to all its stakeholders in order to be sustainable.

They firmly believe that social and financial returns can be simultaneously obtained through microfinance investments and that such feature precisely makes microfinance both a powerful tool for economic development and a very attractive new asset class worth considering in any investment portfolio strategy.

BlueOrchard is the current fund adviser of the Dexia Micro-Credit Fund, which is the first private worldwide and fully commercial microfinance investment fund. It currently services about thirty microfinance institutions in twenty different emerging economies.

www.blueorchard.ch/index.asp

Triodos Bank

www.triodos.nl

Charity Bank (UK)

Charity Bank is the first of its kind. It is a **charity** where people can deposit money to be used solely for charity and social enterprise - lending, not giving.

It is also a not-for-profit **bank** whose sole business is providing affordable finance for charitable work.

<http://www.charitybank.org/>

Venture Capital & Private Equity

Investor's Circle

Investors' Circle (IC) is a non-profit national network of angel and institutional investors, foundation officers and entrepreneurs who seek to achieve financial, social and environmental returns.

Since 1992, Investors' Circle has facilitated the flow of over \$80 million to 130 socially responsible companies and small venture funds.

Early stage, private companies have a particularly powerful role to play in this process. And the ability of entrepreneurs to pursue their missions can be enhanced by support from investors who share their values.

Investors' Circle is an active network of individuals who are intellectually curious, who seek a deal flow to which they might not otherwise have access, and who believe in the power of venture capital to act as a tool for social change. They are dedicated to facilitating the flow of capital to private companies that deliver commercial solutions to social and environmental problems.

www.investorscircle.net/

Commons Capital

Commons Capital LP is a new venture capital fund seeking strong financial returns as well as significant social and environmental impact. They invest in "double bottom-line" early-stage companies whose products; services or corporate cultures promote a sustainable economy by delivering market solutions to major social and environmental challenges.

www.commonscapital.com

Calvert Social Ventures

Known for offering the largest family of socially-screened mutual funds as well as award winning tax-free investment products, Calvert Group, Ltd. has quickly evolved from a single-fund management company in 1976 to become one of the Washington D.C. area's largest mutual fund management firms with more than \$9 billion in assets under management for over 300,000 investors.

Today, Calvert distributes nationwide through major wire house broker/dealers, regional brokerage firms, financial planning organizations, and bank trust departments.

Through its superior investment management, customer service, marketing capabilities, and innovative family of products, Calvert is a leader in providing quality investment programs and services to investors nationwide.

www.calvert.com

Sustainable Jobs Fund

Sustainable Jobs Fund (SJF) helps build great companies. SJF invests in expanding ventures that create excellent employment opportunities in the Eastern United States. SJF and co-investors provide private business equity financing from \$500,000 to \$5 million. SJF is a community development venture capital fund that uses the tools of venture capital and in-depth management assistance to accelerate businesses whose successes are shared by employees, communities, the environment, management and investors. Sustainable Jobs Development Corporation (SJDC) is a nonprofit organization that provides workforce development and sustainable enterprise services to SJF portfolio and prospect companies and their employees.

www.sjfund.com/cms/

The Barred rock Fund

The Community Development Venture Capital Alliance (CDVCA) is the trade association for the rapidly growing community development venture capital industry. Formed in 1993 and incorporated as a not-for-profit in 1995, CDVCA promotes use of the tools of venture capital to create jobs, entrepreneurial capacity and wealth to advance the livelihoods of low-income people and the economies of distressed communities. The organization began when representatives of several community development venture capital funds met to discuss issues of common concern and share experiences and solutions to common problems. Realizing that they had been "reinventing the wheel" in different corners of the country, these funds established a regular forum in which they could exchange ideas. Since then, CDVCA has grown rapidly, now with more than 100 members, bringing together practitioners at all levels of experience and providing opportunities for them to learn, explore best practices, and gain resources for their work.

www.cdvca.com/fund_profiles.html

Ecologic Enterprise Ventures

Founded in late 1999, EcoLogic Enterprise Ventures (EEV) is a nonprofit that operates as a "green" loan fund offering affordable financing to eco-enterprises located in environmentally sensitive areas of Latin America. Targeting the rural credit market, EEV provides small business loans to support productive activities that foster biodiversity conservation and grassroots economic development. Based in Cambridge, Mass., EEV is building a portfolio of \$10,000 to \$200,000 loans to community-based enterprises that are systematically denied access to capital by local financial institutions. Target sectors include sustainable agriculture, non-timber forest products, certified wood, sustainable fisheries, and ecotourism. Preference is given to businesses that:

- Operate in threatened habitats, providing economic alternatives to biodiversity destruction and acting as responsible stewards of wildlife, forests, rivers, coasts, and other natural resources.

- Demonstrate the ability to provide meaningful employment and significant increases in household income to economically marginalized groups, especially peasant farmers, small-scale fishermen, women, and indigenous people.
- Show potential for local self-determination through worker-owned and managed enterprises such as rural cooperatives.
- Are unable to secure financing from conventional commercial sources due to their small size, lack of collateral and/or operating history, and the financial risks associated with the locale.

www.ecologicventures.org

Pacific Community Ventures

PCV, a 501(c)(3) non-profit organization that manages two for-profit investment funds, offers entrepreneurs access to valuable business development resources through various programs and services.

Through its cornerstone service, the Business Advisory Program, PCV utilizes the vast experience and enthusiasm of experienced Bay Area professionals looking for meaningful, effective ways to contribute their own skills and resources to develop enterprises and strengthen low-income communities in the Bay Area. Advisors are matched with portfolio companies to provide business advice and guidance on issues related to the company's growth and development. Other services available to entrepreneurs in PCV's advised and financed portfolios include: Business Roundtables, CEO leadership forums, job placement partnerships and legal assistance.

<http://pacificcommunityventures.org/aboutus/index.html>

Boston Community Venture Fund

Boston Community Venture Fund invests at the intersection of strong community values and solid business practices. As an organization founded on the conviction that financial return and social return need not be mutually exclusive, we're proving that investment in growth-oriented local businesses can be both a sound financial proposition and an effective way to build stronger communities.

<http://www.bcvfund.com/>

A2R (Brazil)

A global market made transparent by the spread of the information technologies and the growing presence of the medias, has allowed the consumer to become well aware of his power of choice and sanction. Investors respond to these new market conditions demanding greater accountabilities throughout the production chain. A new class of clean and efficient, socially responsible and renewable product is increasingly in demand. Helping companies respond to this demand is the business of A2R.

www.a2r.com.br

Kentucky Highlands

Kentucky Highlands Investment Corporation (KHIC) is a Community Development Corporation focusing on venture capital and economic development. The firm, founded in 1968, has as a mission to invest in start-up and expanding non-retail business enterprises located (or to be located) in a nine-county area of southeast Kentucky. KHIC's approach to economic development has made it one of the most successful venture development firms in the country. In addition, KHIC provides financing to expanding businesses located throughout the region.

<http://www.ezec.gov/homepages/rural/kentucky/khic.htm>

Northeast Ventures

Northeast Ventures Corporation is a permanent source of accessible venture capital for people planning to start or expand a business in northeastern Minnesota. We are a private company dedicated to investing in the ideas of the people who live here.

<http://www.neventures.com/>

Coastal Enterprises, Inc.

Founded in 1977, Coastal Enterprises, Inc. (CEI) is a private, nonprofit community development corporation located in Wiscasset, Maine.

- CEI has participated in over \$300 million of economic development financing to 1,000 businesses, social services and housing projects.
- CEI has created or sustained some 10,000 jobs.
- CEI has counseled over 8,500 small businesses.
- CEI has experienced rapid growth in recent years to a current professional and support staff of 101.
- CEI staff are dedicated to working with such development areas as housing and child care, natural resources industries, business financing, manufacturing and emerging environmental technology, employment and self-employment for people with low incomes, and capital and technical support for women in business. In practice, these areas are often interrelated, drawing upon multiple CEI staff and programs.
- CEI engages in research and policy development, most recently on the topics of social return on investment, welfare-to-work, microenterprises, sustainable natural resources and telecommunications.

www.ceimaine.org

Venturesome Fund (UK)

Venturesome is an initiative of the Charities Aid Foundation, exploring ways of providing risk or patient capital to charities and social enterprises.

http://www.sel.org.uk/social_enterprise/ViewADocument.asp?ID=289&CatID=99

Foursome Investments (UK)

Aim:

They aim to prove that it is possible to make an investment grade return on capital while providing a significant improvement to society and/or the environment, at the same time.

Their strategy is to seek investment opportunities that provide a positive correlation between financial performance and social/environmental performance, rather than businesses which achieve strong social/environmental performance at the expense of their financial performance, and vice versa.

It is their belief that there is an inherent positive social dimension to any business that acts within the bounds of the laws and regulations governing its operation. However, they seek businesses that do more than just pay their taxes and treat their employees fairly. They believe that there are a growing number of sectors where added social and/or environmental benefit can be derived from the provision of goods and services. Obvious examples of this can be seen within the environmental technology and services sectors, which encompass: renewable energies, environmental remediation technologies, recycling, clean water and sustainable resource management, to name a few.

By investing in and supporting the development of such companies, Foursome believes it is encouraging a growing trend of entrepreneurial businesses focussed on generating profitable answers to some of society's most challenging questions.

www.foursome.net/home.php

Hot Fudge Venture Fund

The Hot Fudge Social Venture Fund is a community development venture capital fund created by Ben Cohen and several Directors of the Board from Ben & Jerry's Ice Cream.

Its mission is to use the tools of venture capital to create high quality jobs, entrepreneurial capacity and wealth among low-income people and the economies of distressed communities.

Their approach is to provide capital in a strategic context by adding substantial value to the investments they make.

www.sweatx.net/stand/hotfudge.html

Underdog Ventures

Underdog Ventures has developed a new model of customized community venture capital funds, combined with a model of customized philanthropy. Underdog Ventures partners with a group of investors committed to financial, community and environmental results. They create innovative and customized investments to meet the specific needs of each of their investors, each of whom has a dedicated fund that invests in areas that they choose.

Underdog Ventures acts as a managing partner for each of the funds, structuring, negotiating and managing the investments, while serving as an intermediary between investors and the invested companies. They provide value-added consulting, using the expertise of their in-house staff, advisory board members and investors; perform the due-diligence on companies in which they invest; maintain a strong on-the-ground presence in designated communities; create strategic relationships with non-profits; and provide exit opportunities for their investors consistent with their priorities.

www.underdogventures.com/

Bridges Community Ventures, Ltd. (UK)

They:

- invest in businesses with high growth potential in the most under-invested parts of England.
- aim to pick winners and to demonstrate that financial returns can be made by backing entrepreneurs in these communities. This in turn should result in the attraction of increased private sector finance into under-invested communities.

Just as the mainstream venture capital sector has been a powerful force behind entrepreneurship and job creation in the mainstream economy over the past 20-30 years, it is hoped that this fund will begin a similarly catalytic process in the parts of the country that have been left behind economically.

www.bridgesventures.com

Renewal Partners/Endswell Foundation (Canada)

Joel is the Executive Director of the Endswell Foundation, which supports environmental organizations in British Columbia, and the President of Renewal Partners Company, which makes seed capital investments in businesses working towards a sustainable economy in B.C. As well as serving on the board of Tides Canada Foundation, Joel also serves on the board of Tides US, chairs the board of Hollyhock retreat centre, and sits on a variety of other for-profit and non-profit boards. He splits his residential time between Vancouver and Cortes Island, B.C.

<http://www.tidescanada.org/whoarewe/staffandboard.cfm>

Endswell Foundation
610 - 220 Cambie Street
Vancouver BC V6B 2M9
Mr. Joel Solomon, Director of Operations

Impact Partners (India)

A public service venture capital firm, Impact Partners offers professional services and funds to visionary individuals and organizations. They build portfolio organizations that are sector leaders, incubate start-ups, and provide the infrastructure to implement innovative ideas that advocate positive and systemic social change in India.

They believe they must earn the right to advise or invest in social entrepreneurs. Whether that means strengthening their strategic planning, accessing talented individuals, building sector networks, or assisting in fundraising beyond their own commitment, they know it takes more than money to build successful, groundbreaking organizations.

While their vision and strategy is compelling, the real difference comes from the active, hands-on involvement of their investment committee, which combines significant venture capital and social entrepreneurial experience. Their investment committee uses a proactive “outbound” approach to identify capable and distinguished social entrepreneurs, which means they look for you. Daily interactions and regular fieldwork not only allow them to become a team member of the organization but also offer them invaluable learning opportunities.

They manage their investors in a “for profit” manner. Where appropriate, they involve them in specific investments and report to them regularly. And by building a visible brand around Impact as well as select portfolio organizations, they mobilize creative and young people to consider social entrepreneurship as an exciting and serious career option.

www.impactpartners.org

Enterprise Ventures Limited (UK)

Vision:

To invest in, and work in partnership with well managed high growth companies, to achieve significant enhanced value for all shareholders’

<http://home.btconnect.com/entventures/home.htm>

Greater London Enterprise (UK)

Greater London Enterprise (GLE) is London’s economic development company, wholly owned by all 33 London boroughs and therefore in a unique position to deliver economic regeneration across the capital. GLE operates commercially and receives no public subsidy.

<http://www.gle.co.uk/>

The Reinvestment Fund (TRF)

The Reinvestment Fund builds wealth and opportunity for low-wealth communities and low- and moderate-income individuals through the promotion of socially and environmentally responsible development.

<http://www.trfund.com/index3.htm>

Community Catalyst Fund (UK)

Yorkshire Water operates a Community Catalyst Fund which is administered by a panel of 15 colleagues drawn from all levels of the business.

These volunteers are responsible not only for considering requests for financial assistance but also for proactively identify community-based initiatives in Yorkshire to support which align with our business objectives.

<http://www.yorkshirewater.co.uk/yorkshirewater/catalyst.html>

Women's Growth Capital Fund

The Women's Growth Capital Fund was established in 1997 to make equity investments primarily in early and expansion stage women-owned and/or managed businesses. The Fund has \$30 million under management. The Fund has more than 70 individual and institutional investors; 70% of the individual investors are women.

The Fund is the largest venture capital fund in the Eastern United States, and perhaps nationally, which focuses its investments on women-owned and/or managed businesses. It is also one of only three women-focused funds licensed as a Small Business Investment Company (SBIC) by the U.S. Small Business Administration.

www.wgcf.com

Social Capital Partners (Canada)

Social Capital Partners will invest in and incubate revenue generating social enterprises that employ populations outside the economic mainstream in Canada.

<http://www.socialcapitalpartners.ca/>

Microfinance

Action International & USA

Mission:

ACCION USA's mission is to make access to credit a permanent resource to low- and moderate-income small businesses owners in the United States. By providing small or "micro" loans to men and women who have been shut out of the traditional banking sector, ACCION helps build their businesses and increase their incomes.

ACCION sees business credit as a resource that can help narrow the income gap and provide economic opportunity, thereby stabilizing and strengthening communities and economies. At the heart of this vision is the recognition that microlending institutions must be financially sustainable, not perennially dependent on donations or government aid. For this reason, ACCION's microlending programs seek to become financially self-sufficient.

www.accionusa.org

Banco Solidario (Ecuador)

Mission:

To cover a key area in the economic activity in Ecuador and its future development, offering competitive, quality financial products and services to satisfy the needs of those market segments which have difficulty in their access to the formal financial system; with a qualified team of human resources who make this mission their life mission, while protecting the profitability of the capital of the shareholders and investments entrusted to us by our clients.

http://www.banco-solidario.com/en/about_us.html

Opportunity International

A Proven Working Solution

"People living in poverty have as much drive and creativity to succeed as anyone else. What they need is a hand-up, not a handout" - David Bussau, OI Co-founder

For more than 30 years, Opportunity International has been a leading specialist provider of Micro-Enterprise Development (MED). Opportunity International helps the poor to help themselves. Charity and aid can help the poor for a time, but what every person needs is the ability to provide for themselves - for the long term.

<http://www.opportunity.org.au/>

<http://www.opportunity.org.uk/>

<http://www.opportunitycanada.ca>

Woman's Self-Employment Project (WSEP)

WSEP Ventures ("Ventures") is a supporting organization to the Women's Self Employment Project (WSEP), a U.S. leader and innovator in the field of micro enterprise development and micro finance that provides business training and development services to women micro entrepreneurs. Ventures was established to help WSEP achieve long-term financial sustainability through the contribution of unrestricted revenue generated through Ventures' businesses. Together, WSEP and Ventures represent a dynamic new model for sustainability for women's organizations focused on economic opportunity.

www.3gf.org/grantee_wsep.html

<http://www.wsep.net/>

Sewa Bank (India)

The Self-Employed Women's Association (SEWA) was established in Ahmedabad (India) in December 1971 and registered as a trade union in April 1972. In 1974, 4,000 self-employed women established the SEWA Bank as a cooperative bank with the specific objective to provide credit to self-employed women with the view to empower them and reduce their dependence on money sharks. The self-employed women are the bank's shareholders who meet every year. There are regular elections for positions on the Board on Directors, which sets the policies of the bank and sanctions all loans. The bank is professionally run by qualified managers hired by the Board and its operations are supervised by the Reserve Bank of India.

www.gdrc.org/icm/inspire/sewa.html

Foundation for International Community Assistance

Mission:

FINCA (The Foundation for International Community Assistance) has been helping families to create their own solutions to poverty since 1984.

www.villagebanking.org/home.php3

Grameen Bank (Bangladesh)

In 1976 when Professor Muhammad Yunus and his colleagues started giving out tiny loans under a system which later become known as the Grameen Bank, they never imagined that some day they would be reaching hundreds of thousands, let alone two million, borrowers. But the capabilities and commitment of their staff and borrowers gave them the courage to expand boldly. They hardly noticed when they reached milestones like 100,000 borrowers, \$ 1 billion lent, 2 million borrowers and so forth. Everyone predicted that the quality of the services they provided would deteriorate when they reached large numbers; yet, in reality, in many ways it improved.

www.grameen-info.org/

Freedom from Hunger

Mission:

Freedom from Hunger brings innovative and sustainable self-help solutions to the fight against chronic hunger and poverty. Together with local partners, they equip families with resources they need to build futures of health, hope and dignity.

www.freefromhunger.org/

Banco Sol (Bolivia)

We are committed to provide comprehensive financial services for persons, micro entrepreneurs, as well as small and medium sized businesses that belong to the most vulnerable sectors of the economy and represent the majority of the Bolivian population.

<http://www.bancosol.com.bo/en/mision.e.html>

Kashf Foundation (Pakistan)

Inspired by the success of the Grameen Bank, Kashf (meaning miracle or revelation i.e. a process of self-discovery) began in 1996 as an action research programme focusing, for the first two years, on understanding the key aspects of providing microfinance to poor women. By early 2001 Kashf had a network of five branches in Lahore and a client base of 5,088 customers located in 214 centres. DFID and the Aga Khan Foundation provide core funding.

<http://www.enterprise-impact.org.uk/word-files/Kashf.doc>

BRAC (Bangladesh)

BRAC works with people whose lives are dominated by extreme poverty, illiteracy, disease and other handicaps. With multifaceted development interventions, BRAC strives to bring about positive change in the quality of life of the poor people of Bangladesh.

BRAC firmly believes and is actively involved in promoting human rights, dignity and gender equity through poor people's social, economic, political and human capacity building. Although the emphasis of BRAC's work is at the individual level, sustaining the work of the organization depends on an environment that permits the poor to break out of the cycle of poverty and hopelessness. To this end, BRAC endeavours to bring about change at the level of national and global policy on poverty reduction and social progress. BRAC is committed to making its programmes socially, financially and environmentally sustainable, using new methods and improved technologies. As a part of its support to the programme participants and its financial sustainability, BRAC is also involved in various income generating enterprises.

www.brac.net

Basix (India)

The paper explores the challenges of a young MFI in pursuit of rural outreach in India where the formal financial sector actively provides subsidized credit. Specifically, it investigates the unique challenges faced by BASIX, looking at the area of funds and growth. It states that the organization has attracted adequate funds to finance its growth and experimentation however, with external funding becoming rarer then the future is deposit mobilisation from the public.

<http://www.microfinancegateway.org/static/1916.htm>

Microaid

MicroAid is a social enterprise that starts Community Enterprise Networks for poor families.

MicroAid's goal is to empower poor families and their micro- enterprises through direct links to their community based organisation, local government, international development agencies and the private sector.

www.microaid.net

Women's World Banking (WWB)

Poor women are at the center of what the WWB network does. The network reaches poor women by providing and organizing support to its member organizations, which in turn offer direct services to these women. In practical terms this means creating the possibility for a low income woman to build her business and assets, improve her living conditions, keep her family well-fed and healthy, educate her children, develop respect at home and in her community, and secure a political voice.

http://www.womensworldbanking.org/English/1000/what_we_do/index.htm

Community Development Banks

Shorebank

In the late '60s, four friends began meeting at "The Eagle," a neighborhood hangout near the University of Chicago, to exchange ideas and experiences -- shaped by their own different backgrounds and an instinct that a common spirit of social justice could be linked to practical action to serve the local community.

Milton Davis, James Fletcher, Ronald Grzywinski and Mary Houghton went on to make those dreams real when they founded South Shore Bank (now ShoreBank) -- America's first community development bank -- in 1973. In those early days, they attracted depositors by personally visiting customers in their homes, sharing dessert in their parlors, and talking with their neighbors. Slowly, step by step, they proved that a strong, independent banking presence in the neighborhood could help get a community back on its feet again.

Thirty years later, ShoreBank has successfully lent over \$600 million to more than 13,000 businesses and individuals in its largest communities, and ShoreBank has been profitable every year since 1975. And the banking model that four friends shaped at a quiet corner table on the south side of Chicago has today expanded east to Cleveland, north to the upper Peninsula of Michigan and Detroit, west to Washington state, and even on to developing nations as far away as Pakistan, Kenya and Bangladesh

www.sbk.com/livesite/main/

Chittenden Bank

Chittenden Bank, a subsidiary of **Chittenden Corporation**, was originally chartered as the Chittenden County Trust Company back in 1906. Today, Chittenden Bank is Vermont's largest, full-service bank with over sixty offices throughout the state. They've grown and changed with the state itself, and they are proud to have one out of three Vermont households as customers of Chittenden Bank.

<https://www.chittenden.com/>

Louisville Community Development Bank (LCDB)

- Support small business development and expansion
- Make homeowners out of home renters
- Improve the quality and value of real estate
- Increase the number and quality of goods and services available to residents
- Link neighborhood residents to career-path employment

The Louisville Community Development Bank is a for-profit, FDIC-insured, commercial bank. Through its financial products and services, it provides improved access to capital for area residents and businesses. Since opening, the Bank has made over \$37 million in loans. These loans have created or saved 1,062 jobs for Investment Area residents.

<http://www.morethanabank.com/>

Wainwright Bank and Trust Company

Mission:

With a sense of inclusion and diversity that extends from the boardroom to the mailroom, Wainwright Bank & Trust Company resolves to be a leading socially responsible bank. The Bank is equally committed to all its stakeholders -- employees, customers, communities and shareholders.

www.wainwrightbank.com

University Bank

Vision:

- Placing customers first and exceeding their expectations
- Locally-based decision making
- Serving their diverse community
- Maintaining the highest ethics
- Improving the quality of life for Washtenaw County children

www.university-bank.com/

Bank of Newport

At Bank of Newport, we have always taken our role as a community bank quite seriously. From our mortgage originators and insurance providers, to our facilities team and financial planners, we are Bank of Newport - we are also a part of our community.

<http://www.banknewport.com/community.html>

Community Bank of the Bay

<http://www.communitybankbay.com/>

Community Capital Bank

<http://www.communitycapitalbank.com/>

National Cooperative Bank (NCB)

<http://www.ncb.coop/>

Southern Development Bancorporation

<http://www.southerndevelopmentbancorp.com/>

Investors & Others

Rockefeller ProVenEx

The Program Venture Experiment (ProVenEx) seeks to catalyze private-sector investments in areas that will benefit poor and excluded people. Through this program, the Foundation makes philanthropically motivated investments that are structured using market principles in early-stage and growing businesses that will further the work of one of the Foundation's four main themes. To date, ProVenEx's investments include businesses that: create jobs in low-income inner-city communities in the United States, enhance the development and distribution of locally adapted seed varieties to African farmers, develop preventive technologies against HIV, and preserve and distribute culturally important music.

<http://www.rockfound.org/display.asp?context=3&SectionTypeID=55&Preview=0&ARCurrent=1>

Calvert Social Investment Foundation

Mission:

The Calvert Social Investment Foundation (Calvert Foundation) was established with a simple goal: to help end poverty through investment. It serves as a facility for individuals and institutions, seeking to place capital on softer terms to finance affordable homes, fund small and micro businesses and to make available essential community services. Calvert Foundation works in disadvantaged communities with local partner non-profits that use common sense and compassion to provide the investment capital people need to work themselves out of poverty.

Calvert Foundation's broader objective is to create "community investment" as a new asset class in the financial services industry. It employs a range of innovative financial instruments, web-based information services and philanthropic products including the Calvert Community Investment Note™, the Community Investment Profile Database, the Calvert Giving Fund, the Community Giftshare. Associated with the Calvert Group mutual fund company, Calvert Foundation is an independent 501(c) 3 non-profit dedicated to building homes, creating jobs and transforming lives.

Calvert Foundation should not be confused with Calvert Group, Ltd . Calvert Group, one of the pioneers of socially responsible investing, has been in the mutual fund business for over 25 years and manages approximately \$8.5 billion in assets in 30 screened and non-screened portfolios for over 300,000 shareholders.

www.calvertfoundation.com

Trillium Asset Management

Trillium Asset Management will be the leader in investing to achieve financial gain, social equity, and ecological sustainability. To bring this vision to life, they seek to:

- Provide superior products and services that fulfill the financial, social, and ecological goals of individual and intuitional investors
- Explore and develop all possible means of social progress offered by the capital markets, and educate other concerned investors in their use
- Create a work environment that encourages personal development and growth, and in which ownership, responsibilities and rewards are broadly shared

Support other persons and organizations working to build a just society and a better world

http://www.trilliuminvest.com/pages/about/about_bioDetail.asp?StaffID=12

NYC Investment Fund

The New York City Investment Fund is a private fund with a civic mission. The fund was the vision of Henry R. Kravis, founding partner of Kohlberg Kravis Roberts & Co., who serves as its Chairman. His goal was to mobilize the city's financial and business leaders to help build a stronger and more diversified local economy. To that end, the Fund has built a network of top experts from the investment and corporate communities who help identify and support New York City's most promising entrepreneurs in both the for-profit and not-for-profit sectors.

<http://www.nycif.org/>

Jacobs Family Foundation

Mission:

The Jacobs Family Foundation is a grantmaker, which supports innovative, practical strategies for community change. Through its companion organization -- the Jacobs Center for NonProfit Innovation and Market Creek Partners -- JFF explores new philanthropic roles and relationships for strengthening under-invested neighborhoods.

Vision:

The Jacobs Center and Jacobs Family Foundation contribute talent and support for the development of the "hub" and the surrounding neighborhoods. Through project support to Market Creek Plaza and its neighborhood grants program, the Jacobs Center works to build the sustaining infrastructure and resources needed for a strong community.

<http://www.jacobsfamilyfoundation.org/guide.html>

The Tides Foundation

Mission:

Tides Foundation partner with donors to increase and organize resources for positive social change.

They facilitate effective grantmaking programs create opportunities for learning and build community among donors and grantees.

www.tidesfoundation.org

CDFI fund

The Community Development Financial Institutions (CDFI) Fund was created to expand the availability of credit, investment capital, and financial services in distressed urban and rural communities. The Fund was authorized by the Riegle Community Development and Regulatory Improvement Act of 1994, as a bipartisan initiative. By stimulating the creation and expansion of diverse community development financial institutions (CDFIs) and by providing incentives to traditional banks and thrifts, the Fund's investments work

toward building private markets, creating healthy local tax revenues, and empowering residents. The CDFI Fund provides relatively small infusions of capital to institutions that serve distressed communities and low-income individuals. The Fund's activities leverage private-sector investments from banks, foundations, and other funding sources. Since the Fund's creation, it has made more than \$534 million in awards to community development organizations and financial institutions.

www.cdfifund.gov

NH Community Development Finance Authority

The **Community Development Finance Authority** (CDFA) was established by legislation (RSA 162-L) in 1983 to address the issues of affordable housing and economic opportunity for low and moderate income New Hampshire residents. The Authority is both a body politic and a nonprofit corporation that is governed by an eleven member board of directors who are appointed by the governor for five year terms.

<http://www.nhcdfa.org/>

F.B. Heron Foundation

The F.B. Heron Foundation is a private, grantmaking institution dedicated to supporting organizations with a track record of building wealth within low-income communities.

Mission:

The Foundation was created in 1992 with the mission of helping people and communities to help themselves.

<http://fdncenter.org/grantmaker/fbheron>

Renewal Partners/Endswell Foundation (Canada)

Joel is the Executive Director of the Endswell Foundation, which supports environmental organizations in British Columbia, and the President of Renewal Partners Company, which makes seed capital investments in businesses working towards a sustainable economy in B.C. As well as serving on the board of Tides Canada Foundation, Joel also serves on the board of Tides US, chairs the board of Hollyhock retreat centre, and sits on a variety of other for-profit and non-profit boards. He splits his residential time between Vancouver and Cortes Island, B.C.

<http://www.tidescanada.org/whoarewe/staffandboard.cfm>

Endswell Foundation
610 - 220 Cambie Street
Vancouver BC V6B 2M9
Mr. Joel Solomon, Director of Operations

Social Investors Forum

Launched in the Spring of 2000, the Social Investors Forum tackles a core problem faced by nonprofits: existing charitable and government funding sources are inadequate to meet human and social needs.

The Forum's proven approach: help nonprofits develop and launch their own moneymaking enterprises. The idea is simple: instead of simply "giving them fish," the Forum helps teach nonprofits how to fish.

www.socialinvestorsforum.org

Annie E. Casey Foundation

The Annie E. Casey Foundation (AECF) has worked to build better futures for disadvantaged children and their families in the United States. The primary mission of the Foundation is to foster public policies, human service reforms, and community supports that more effectively meet the needs of today's vulnerable children and families.

www.aecf.org

Enterprise Foundation

The Enterprise Foundation rebuilds communities. Our mission is to see that all low-income people in the United States have the opportunity for fit and affordable housing and to move up and out of poverty into the mainstream of American life.

<http://www.enterprisefoundation.org/>

Shefa Fund

TZEDEC (the Tzedek/"Justice" Economic Development Campaign) encourages American Jews nationwide to invest in low-income community development.

TZEDEC enables federations, synagogues, family foundations and individuals to invest Jewishly - and as partners, not patrons – in community-based banks, loan funds and credit unions. These "community development financial institutions" (CDFIs) provide sorely needed financial services and credit to people in impoverished urban and rural areas.

<http://www.shefafund.org/>

Needmor Fund

Mission and Vision:

The mission of the Needmor Fund is to work with others to bring about social justice. They support people who work together to change the social, economic, or political conditions which bar their access to participation in a democratic society.

<http://www.needmorfund.org/>

Sustainable Development

General Overview

Sustainable Development

General Overview

Information Resources (Books, Articles, Websites)

“The Ecology of Commerce: A Declaration of Sustainability” by Paul Hawken

Paul Hawken, the entrepreneur behind the Smith & Hawken gardening supplies empire, is no ordinary capitalist. Drawing as much on Baba Ram Dass and Vaclav Havel as he does on Peter Drucker and WalMart for his case studies, Hawken is on a one-man crusade to reform our economic system by demanding that First World businesses reduce their consumption of energy and resources by 80 percent in the next 50 years. As if that weren't enough, Hawken argues that business goals should be redefined to embrace such fuzzy categories as whether the work is aesthetically pleasing and the employees are having fun; this applies to corporate giants and mom-and-pop operations alike. He proposes a culture of business in which the real world, the natural world, is allowed to flourish as well, and in which the planet's needs are addressed. Wall Street may not be ready for Hawken's provocative brand of environmental awareness, but this fine book is full of captivating ideas.

<http://www.amazon.com/exec/obidos/ASIN/0887307043/inktomi-bkasin-20/ref%3Dnosim/102-6711886-8853762#product-details>

“Sustainable Consumption & Production” – by J. Makower & D. Fleischer

June 4, 2003 - Joel Makower and Deborah Fleischer, Funders Working Group on Sustainable Consumption and Production: Strategies for Accelerating Positive Change- A Briefing Guide for Grantmakers

<http://www.ega.org/resources/egasustain.pdf>

“Global Sustainability and the Creative Destruction of Industries” by Hart & Milstein

Hart, Stuart L., Mark B. Milstein. Global Sustainability and the Creative Destruction of Industries. Sloan Management Review, 1999.

Hart and Milstein argue that the emerging challenge of global sustainability will catalyze a new round of "creative destruction" that innovators and entrepreneurs will view as one of the biggest business opportunities in the history of commerce. In this article, the authors propose a framework to help managers look beyond continuous, incremental improvement of existing products and processes to see the business world differently and make sustainable opportunities more apparent.

To better understand sustainability-driven creative destruction, managers must evaluate business opportunities on the basis of three types of markets or economies that exist in all countries or geographical regions: developed (nearly 1 billion global customers), emerging (estimated at roughly 2 billion people), and surviving (roughly half of humanity or 3 billion customers). The authors discuss the different strategies required to achieve sustainable development in each economy.

www.findarticles.com/cf_0/m4385/1_41/57533462/p1/article.jhtml

“The Fortune at the Bottom of the Pyramid” by Prahalad & Hart

Prahalad, C.K., Stuart L. Hart. The Fortune at the Bottom of the Pyramid. strategy+business, a publication of Booz Allen Hamilton Inc., 2002.

www.amazon.com/exec/obidos/ASIN/B00006L5AW/inktomi-bkasin-20/102-2513133-6405710

“Single Bottom Line Sustainability” by P. Gilding, M. Hogarth, D. Reed (Ecos Corporation)

Gilding, Paul, Murray Hogarth, Don Reed. Single Bottom Line Sustainability. Ecos Corporation, 2002.

Ecos Corporation’s mission is to drive change by creating value for business through sustainability—helping to raise the quality of life for all people while preserving ecological integrity.

They are a passionate group of business professionals and former social change campaigners who now work together as strategic advisors to large corporations—to help them convert Values to Value™.

Ecos develops business strategies that build value through delivering social and environmental solutions. They do so because they believe market forces can be leveraged to speed the transition to sustainability. Working with some of the world’s most influential companies and business leaders over the past seven years lead them to believe the key challenge is not the lack of desire to act, but rather the lack of understanding and tools with which to act.

In response, Ecos work with its clients to develop people-focused and business-compatible paths for companies to “operationalize” sustainability. This is the second in a series of discussion papers where they will share the results of these efforts.

www.ecoscorporation.com/think/sustainbusiness/single_bottom_line.pdf

“The Next Bottom Line: Making Sustainable Development Tangible” by M. Arnold & R. Day (WRI)

Arnold, Matthew, Robert M. Day. The Next Bottom Line: Making Sustainable Development Tangible World Resources Inst., 1998

Overview:

Business people all over the world are discovering extraordinary opportunities generated by protecting the natural environment. While scientists debate the magnitude of climate change and natural resource degradation, and while policymakers develop appropriate policy responses, many in business are seizing the moment to move quickly toward sustainable development. They are developing new products and services that solve environmental problems and create business value at the same time. They are beginning to rely on intangible resources, such as knowledge and communication, with a smaller amount of natural resources to meet the needs of customers more effectively and efficiently than their competitors. They are discovering ways to deliver energy, food, shelter, and consumer goods with far lower environmental impact. They are commercializing new technology in power generation, food and fiber production, and dozen of other industries. These early innovators and others in their wake are proof that a sound business can indeed create a safe environment.

www.amazon.com/exec/obidos/ASIN/1569732833/inktomi-bkasin-20/102-2513133-6405710

Communities by Choice Website

Mission:

Communities by Choice is a national network of communities, organizations and individuals committed to learning and practicing sustainable development. We define sustainable development as the process of making choices that consider the long-term economy, ecology and equity of *all* communities. Our mission is to share knowledge and resources that advance the practice of sustainable development.

Our strategies include building a learning network, building the capacity of network participants, managing knowledge and resources, redirecting resources in support of sustainable development and measuring our collective progress.

www.communitiesbychoice.org

“Natural Capitalism” book by P. Hawken, A. Lovins, L.H. Lovins

Hawken, Paul, Amory Lovins, L. Hunter Lovins. Natural Capitalism. 1st ed. Back Bay Books, 2000.

The world of business is changing—fast. The prevailing model that has its roots in the industrial revolution and that dominated the last century- no longer applies. *Natural Capitalism* introduces an alternative, a new paradigm. Praised by business and political leaders as well as economists and environmentalists around the globe, this groundbreaking book reveals how tomorrow’s most successful global businesses will draw profit from their own environmental responsibility.

www.amazon.com/exec/obidos/ASIN/0316353000/qid=1062523120/sr=2-1/ref=sr_2_1/002-6341513-0325611

Wavefront Newsletter (AtKisson)

Once a month, WaveFront brings "sustainability news you can use" directly to your preferred email address, free of charge.

We survey a wide range of websites and publications, talk to colleagues, and keep our ears to the ground to gauge where the sustainability movement is heading, and what's "Ahead of the Curve," "Riding the Wave," or just totally "Out of the Loop."

<http://www.atkisson.com/scan/index.html>

Naturalbusiness.com Website

www.naturalbusiness.com

“Serving the World’s Poor, Profitably” by A. Hammond & C.K. Prahalad

WRI’s Digital Dividend project, led by WRI Vice President for Special Projects and Innovation, Dr. Allen Hammond, explores business strategies for providing poor communities in developing countries with efficient and affordable access to basic goods and services-and making a return on investment at the same time. Hammond and WRI board member C.K. Prahalad report their findings in "Serving the World’s Poor, Profitably," published in the September issue of *Harvard Business Review*.

http://pubs.wri.org/pubs_newsviews_text.cfm?cid=412

“Leverage for the Environment” report by J. Ganzi

Ganzi, John. Leverage for the Environment: A Guide to the Private Financial Services Industry. WRI.

<http://www.worldretailstore.com/item/BE-1569732671.html>

“Sustainable Growth, the DuPont Way” by C. Holliday

Holliday, Chad. Sustainable Growth, the DuPont Way. Harvard Business Review, 2001.

www.inknowvate.com/inknowvate/HBR%20Article%20Dupont%20Sustainable%20Growth.pdf

“For the Common Good: Redirecting the Economy Toward Community, the Environment and a Sustainable Future” by H. Daly & J. Cobb

Daly, Herman E. and John B. Cobb Jr. For the Common Good: Redirecting the Economy Toward Community, the Environment and a Sustainable Future. Beacon Press, 1994.

http://search.barnesandnoble.com/bookSearch/isbnInquiry.asp?sourceid=00387615287960164772&ISBN=0807047058&bfdate=09-30-2003+15:39:07&bfinfo=For_the_Common_Good

“Cannibals with Forks: The Triple Bottom Line of 21st Century Business” by J. Elkington

In this book, Elkington popularises the concept of the 'triple bottom line' and argues that businesses can and must help society achieve the three interlinked goals of economic prosperity, environmental protection and social equity.

<http://www.positiveoutcomes.com.au/page.asp?partid=72#anchor1432>

Sustainablebusiness.com Website

Vision:

A world where human activities live in harmony with earth's carrying capacity.

www.sustainablebusiness.com

Green@Work Magazine

A compelling, contemporary publication dedicated to telling the stories of ecological pioneers, products and systems that are driving an important change in corporate and bureaucratic America. A magazine that unifies many different public and private sector forces with a common cause: green initiatives. A magazine whose audience targets 25,000 of the most powerful decision-makers and agents of change who are painting the economic landscape green.

The focus of green@work is pro-business and positive. Its goal is to reinforce sustainable initiatives by sharing success stories and profiling the individuals who are making it happen. green@work explores the social, ideological, economic and political issues that

advance green design strategies, as well as the intellectual and charismatic expressions of the visionaries who are fostering mainstream acceptance of ecological advocacy.

www.greenatworkmag.com/magazine.html

GreenBiz.com Website

Mission:

The nonprofit, nonpartisan GreenBiz.com works to harness the power of technology to bring environmental information, resources, and tools to the mainstream business community. Its principal mission is:

"To provide clear, concise, accurate, and balanced information, resources, and learning opportunities to help companies of all sizes and sectors integrate environmental responsibility into their operations in a manner that combines ecological sustainability with profitable business practices."

www.greenbiz.com

Cool Companies.org Website

Coolcompanies.org is a project of the non-profit Center for Energy & Climate Solutions. The Center was founded in 1999 by Dr. Joe Romm – former head of energy efficiency and renewables at the US Department of Energy – to promote clean and efficient energy technologies as a money-saving tool for reducing greenhouse gas emissions and other pollutants. They help businesses, government, and environmental organizations develop technological, strategic, financial, and regulatory tools to foster the adoption of clean solutions.

The Center helps companies design and implement strategies to cut energy use and pollution – particularly the greenhouse gas emissions responsible for global warming. They develop institutional ‘best practices’ for greenhouse gas reduction, and provide neutral, credible verification of emissions baselines and reductions. They also partner with outside organizations to promote these approaches using performance-based data and contemporary case studies presented through a variety of channels.

www.coolcompanies.org/

Environmental News Network (ENN) Website

For 10 years the Environmental News Network has helped to educate the world about environmental issues. They began in 1993 as a monthly print publication called "Environmental News Briefing," and launched www.enn.com in 1995 to reach a broader, more diverse audience.

Today they offer timely environmental news, live chats, interactive quizzes, daily feature stories, forums for debate, audio, video and more. Their goals are to help educate the public on major issues and to provide tools to help individuals take action in their own communities. They are not an activist publication, but instead try to present information from all sides, enabling their users to make their own decisions.

www.enn.com/

Communities by Choice Resource Network

Communities by Choice is a national network of communities, organizations and individuals committed to learning and practicing sustainable development. They define sustainable development as the process of making choices that consider the long-term economy, ecology and equity of *all* communities. Their mission is to share knowledge and resources that advance the practice of sustainable development.

Their strategies include building a learning network, building the capacity of network participants, managing knowledge and resources, redirecting resources in support of sustainable development and measuring their collective progress.

www.communitiesbychoice.org/about.cfm

“Tomorrow’s Markets” report by WRI, UNEP & WBCSD

World Resources Institute is an environmental research and policy organization that creates solutions to protect the planet and improve people’s lives.

WRI’s work is concentrated on achieving progress toward four key goals:

- Protect Earth’s living systems
- Increase access to environmental information
- Create sustainable enterprise and opportunity
- Reverse global warming.

WRI is an independent, non-partisan organization that works closely with governments, the private sector, and civil society groups in more than 100 countries around the world. Its strength is the ability to catalyze permanent change through partnerships that implement innovative, incentive-based solutions founded upon hard, objective data. WRI believes that harnessing the power of markets will ensure real, not cosmetic, change. WRI demands measurable results from its work; ideas must lead to action.

www.wri.org/press/tomorrow_market.html

“Beyond Greening: Strategies for a Sustainable World” HBR article by S. Hart

Hart, Stuart. Beyond Greening: Strategies for a Sustainable World. Harvard Business Review, Jan 1997.

http://harvardbusinessonline.hbsp.harvard.edu/b02/en/common/item_detail.jhtml?id=97105

“Coming Clean” by D. Austin (WRI)

Repetto, Robert, Duncan Austin, Coming Clean. 2002. 44.

In Coming Clean Corporate Disclosure of Financially Significant Environmental Risks, WRI economists Robert Repetto and Duncan Austin examine the extent to which one group of companies are failing to disclose their exposure to financially material environmental issues. In a companion WRI report entitled Pure Profit: The Financial Implications of Environmental Performance, the authors showed that in the U.S. pulp and paper industry-just one of many sectors for which the environment poses financial threats-many impending environmental issues are likely to affect companies' competitive positions and fundamental shareholder values. Coming Clean shows that such risks have not been adequately disclosed in annual or quarterly filings to the SEC. Such omissions appear to infringe the SEC's own rules and guidelines, endangering investors as a result. The report, raises issues regarding the SEC's enforcement policies as well as companies' reporting practices.

www.wristore.com/comingclean.html

Business and Sustainable Development: A Global Guide (bsdglobal.com)

www.bsdglobal.com

“Cradle to Cradle” book by W. McDonough & M. Braungart

McDonough, William, Michael Braungart. Cradle to Cradle. North Point Press, 2002.

<http://popmatters.com/books/reviews/c/cradle-to-cradle.shtml>

“Cross Cutting Themes” by WBCSD

The World Business Council for Sustainable Development (WBCSD) is a coalition of 165 international companies united by a shared commitment to sustainable development via the three pillars of economic growth, ecological balance and social progress.

Our members are drawn from more than 30 countries and 20 major industrial sectors. We also benefit from a global network of 43 national and regional business councils and

partner organizations located in 39 countries, involving some 1,000 business leaders globally.

<http://www.wbcsd.org/templates/TemplateWBCSD4/layout.asp?type=p&MenuId=NzQ&doOpen=1&ClickMenu=LeftMenu>

“Stalking the Elusive Business Case for Corporate Sustainability” by D. Reed (WRI)

For the private sector, a critical issue is how social and environmental investments impact a company's bottom line.

The conventional wisdom is that such investments adversely affect corporate profits, yet many companies have found that prudent environmental investments can lower costs or improve efficiency sufficiently to be a net economic gain. But is there sound financial evidence to back these claims?

http://business.wri.org/pubs_description.cfm?PubID=3052

“Global Sustainability and the Creative Destruction of Industries” by Hart & Milstein

Hart, Stuart L., Mark B. Milstein. Global Sustainability and the Creative Destruction of Industries. Sloan Management Review, 1999.

Hart and Milstein argue that the emerging challenge of global sustainability will catalyze a new round of "creative destruction" that innovators and entrepreneurs will view as one of the biggest business opportunities in the history of commerce. In this article, the authors propose a framework to help managers look beyond continuous, incremental improvement of existing products and processes to see the business world differently and make sustainable opportunities more apparent.

To better understand sustainability-driven creative destruction, managers must evaluate business opportunities on the basis of three types of markets or economies that exist in all countries or geographical regions: developed (nearly 1 billion global customers), emerging (estimated at roughly 2 billion people), and surviving (roughly half of humanity or 3 billion customers). The authors discuss the different strategies required to achieve sustainable development in each economy.

www.findarticles.com/cf_0/m4385/1_41/57533462/p1/article.jhtml

“Sustainability Innovations: Ecological and Social Entrepreneurship and the Management of Antagonistic Assets” by K. Hockets

http://www.insead.edu/CMER/publications/wp/Hockerts_2003_Sustainability_Innovation.pdf

“At the Edge: Sustainable Development in the 21st Century” by A. Dale

At the Edge is a rich and evocative call to action at a time when new ideas are urgently needed. Mandatory reading for policy analysts and decision makers in the public, private, and volunteer sectors, it will be equally useful to scholars, teachers, students, and others interested in creating sustainable societies. Throughout the world, biophysical evidence is mounting that human growth and activity patterns are slowly destroying the earth. This ecological deterioration is accompanied by similar social and economic decline, with potentially grave consequences for the continued existence of human societies.

Yet, as Ann Dale compassionately argues, it is not too late to take action. Hope lies in sustainable development -- the fundamental human imperative of the 21st century. Sustainable development, in Dale's view, is the process of reconciling three imperatives: the ecological, the social, and the economic. Equitable access to resources in all three spheres is fundamental to the global realization of sustainable development. This will not be realized without strong leadership by governments at all levels. Ultimately needed is a new framework for governance based on human responsibility and a recognition of the interconnectedness of human and natural systems.

http://www.ubcpres.ca/search/title_book.asp?BookID=1865

International Network for Environmental Management Website – INEM.org

The International Network for Environmental Management (INEM), a non-profit organisation, is the world federation of non-profit environmental management associations and cleaner production centres. The INEM network comprises more than 30 member and affiliated environmental management associations and 10 cleaner production centres in more than 25 countries on all five continents. INEM Organising Committees have been created in additional countries. The Main Secretariat is located in Hamburg, Germany.

INEM was founded in February 1991 by environmental management associations from Austria, Germany and Sweden, and was publicly launched at the second World Industry Conference on Environmental Management in April 1991 in Rotterdam.

INEM's goals are to minimise the environmental impacts of industrial operations, and to help business and industry reconcile the imperatives of development and the environment.

<http://www.inem.org/>

Resource Organizations

Environmental Grantmakers Associations (EGA)

The Environmental Grantmakers Association (EGA), a project of the Rockefeller Family Fund, was formed in 1987 with twelve member foundations from across the United States. Today, our members represent over 250 foundations from North America and around the world.

www.ega.org

Center for New American Dream

Mission:

The Center for a New American Dream helps Americans consume responsibly to protect the environment, enhance quality of life and promote social justice.

www.newdream.org

The Natural Step (TNS)

address problems at the source and turn them into opportunities for innovation. As an international advisory and research organization, we work with some of the largest resource users on the planet to create solutions, models and tools designed to accelerate global sustainability.

www.naturalstep.org

Environmental Defense

Mission:

Environmental Defense is dedicated to protecting the environmental rights of all people, including future generations. Among these rights are clean air and water, healthy and nourishing food, and a flourishing ecosystem.

A generation ago, Environmental Defense helped launch the modern environmental movement by winning a ban on the pesticide DDT, thus showing how a handful of individuals can use science and the law to bring about national reform. Since then, we have grown into one of America's most influential environmental advocacy groups, with more Ph.D. scientists and economists on staff than at any other such organization.

Guided by science, Environmental Defense evaluates environmental problems and works to create and advocate solutions that win lasting political, economic and social support because they are nonpartisan, cost-efficient and fair.

Environmental Defense believes that a sustainable environment will require economic and social systems that are equitable and just. We affirm our commitment to the environmental rights of the poor and people of color.

As an American organization, Environmental Defense will always pay special attention to American environmental problems, and to America's role in both causing *and* solving global environmental problems.

www.environmentaldefense.org/home.cfm

World Resources Institute (WRI)

World Resources Institute is an environmental research and policy organization that creates solutions to protect the planet and improve people's lives.

WRI's work is concentrated on achieving progress toward four key goals:

- Protect Earth's living systems
- Increase access to environmental information
- Create sustainable enterprise and opportunity
- Reverse global warming.

WRI is an independent, non-partisan organization that works closely with governments, the private sector, and civil society groups in more than 100 countries around the world. Its strength is the ability to catalyze permanent change through partnerships that implement innovative, incentive-based solutions founded upon hard, objective data. WRI believes that harnessing the power of markets will ensure real, not cosmetic, change. WRI demands measurable results from its work; ideas must lead to action.

www.wri.org

Coalition for Environmentally Responsible Economies (CERES)

Today, it is often difficult for corporations, activists and socially responsible investors to have honest, meaningful dialogue on corporations' environmental and social practices. CERES provides an innovative forum for this kind of exchange and a unique opportunity for real accountability and real results.

CERES is...

The leading U.S. coalition of environmental, investor, and advocacy groups working together for a sustainable future

Companies that have committed to continuous environmental improvement by endorsing the CERES Principles, a ten-point code of environmental conduct

A common ground where groups with widely different backgrounds, assumptions, and visions find concrete solutions to today's environmental challenges

www.ceres.org

Factor 10 Institute

The Factor 10 Institute has been created to provide practical support for achieving significant advances in resource productivity in the production and consumption sectors through:

- The design of eco-efficient logistic systems, processes, and services;
- The development of dematerialized products, services, buildings, and infrastructures with high resource productivity;
- Appropriate marketing strategies, maintenance, recycling and disposal of goods;
- Enhancing consumer information on the environmental quality of products and services;
- The creation and performance of research and development plans;
- Offering seminars for firms, politicians and other interested people, giving practical advice for implementing the Factor 10 and the MIPS-concepts at home, in the public domain, in firms, and in governments;
- Small scale seminars for political and business leaders to identify long-term sustainable economic options;
- Forging coalitions among international initiatives for practical approaches toward sustainability, such as The Natural Step, Sweden, the Zero Emission Forum, Japan, The Environmental Footprint, USA, and the Dutch Sustainable Technology Program.

The Factor 10 Institute takes particular interest in questions relating to the increase in employment and the sustainable financing of governments. It also provides services to the international Factor 10 Club.

www.factor10-institute.de/

Center for Environmental Leadership

Mission:

The Center for Environmental Leadership in Business engages the private sector worldwide in creating solutions to critical global environmental problems in which industry plays a defining role.

Vision:

The Center for Environmental Leadership in Business provides a new forum for collaboration between the private sector and the environmental community. Center initiatives promote business practices that reduce industry's ecological footprint,

contribute to conservation and create value for the companies that adopt them. The result is a net benefit for the global environment and participating companies.

www.celb.org

United Nations Environment Programme (UNEP)

Mission:

To provide leadership and encourage partnership in caring for the environment by inspiring, informing, and enabling nations and peoples to improve their quality of life without compromising that of future generations.

www.unep.org

Environmental Protection Agency (EPA)

The mission of the U.S. Environmental Protection Agency is to protect human health and to safeguard the natural environment--air, water, and land--upon which life depends.

EPA's purpose is to ensure that:

- All Americans are protected from significant risks to human health and the environment where they live, learn and work.
- National efforts to reduce environmental risk are based on the best available scientific information.
- Federal laws protecting human health and the environment are enforced fairly and effectively.
- Environmental protection is an integral consideration in U.S. policies concerning natural resources, human health, economic growth, energy, transportation, agriculture, industry, and international trade, and these factors are similarly considered in establishing environmental policy.
- All parts of society--communities, individuals, business, state and local governments, tribal governments--have access to accurate information sufficient to effectively participate in managing human health and environmental risks.
- Environmental protection contributes to making their communities and ecosystems diverse, sustainable and economically productive.
- The United States plays a leadership role in working with other nations to protect the global environment.

www.epa.gov/epahome

The Centre for Sustainable Design (UK)

Mission:

The Centre for Sustainable Design (CFSD) facilitates discussion and research on eco-design and environmental, economic, ethical and social (e3s) considerations in product and service development and design. This is achieved through training and education, research, seminars, workshops, conferences, consultancy, publications and Internet. The Centre also acts as an information clearing house and a focus for innovative thinking on sustainable products and services.

www.cfsd.org.uk

World Business Council for Sustainable Development (WBCSD)

The World Business Council for Sustainable Development (WBCSD) is a coalition of 165 international companies united by a shared commitment to sustainable development via the three pillars of economic growth, ecological balance and social progress.

Our members are drawn from more than 30 countries and 20 major industrial sectors. We also benefit from a global network of 43 national and regional business councils and partner organizations located in 39 countries, involving some 1,000 business leaders globally.

Mission:

To provide business leadership as a catalyst for change toward sustainable development, and to promote the role of eco-efficiency, innovation and corporate social responsibility.

www.wbcd.ch/templates/TemplateWBCSD4/layout.asp?type=p&MenuId=MQ&doOpen=1&ClickMenu=LeftMenu

Friends of the Earth

Friends of the Earth is the U.S. voice of an influential, international network of grassroots groups in 70 countries. Founded in San Francisco in 1969 by David Brower, Friends of the Earth has for decades been at the forefront of high-profile efforts to create a more healthy, just world.

www.foe.org

Redefining Progress Business Action for Sustainable Development

Redefining Progress (RP) works with a broad array of partners to shift the economy and public policy towards sustainability.

<http://www.rprogress.org/>

Ecos Corporation

We are an organisation with a dual identity. As a campaigning organization, we steer companies toward sustainable growth. As a consultancy, we help them profit from that change.

As people, we are motivated by our values and our mission to drive change towards sustainable growth.

<http://www.ecoscorporation.com/>

Natural Logic

Natural Logic applies our Ecological Lens™ -- the nearly four billion years experience of nature's ecosystems in developing efficient, adaptive, resilient, sustainable systems -- to identify and guide strategy, assessment, design and information services that build profit, competitive advantage and quality of life through exceptional environmental performance.

<http://www.natlogic.com/>

Battelle

Battelle develops new technologies, commercializes products, and provides solutions for industry and government. Our innovations range from medical products and pharmaceuticals to products for the automotive, chemical, and agrochemical industries. We develop environmental and energy solutions for industry and government, and we develop practical, technological solutions for challenges in national security, transportation, and health and human services.

<http://www.battelle.org/>

SustainAbility Education Center

The Sustainability Education Center was created in 1995 in response to the growing need for educational materials, professional development and community education focused on sustainability. First founded as a program of The American Forum for Global Education, the Center spun off and became an independent organization on July 1, 2002. While continually expanding its range of products and services, the Center builds on the American Forum's twenty-eight years of program expertise in global and environmental education, technical assistance, curriculum and professional development.

www.sustainabilityed.org/secmenu.htm

Green Power Market Development Group

Mission:

- Develop strategies to reduce green power costs by using innovative purchasing options, by reducing transaction costs for companies, and by gaining economies of scale through working as a group.
- Reduce market barriers faced by green power suppliers and buyers by providing independent information to potential customers.
- Define the business case for buying green energy products by recognizing the value of renewable energy to diversify energy portfolios.

Since January 2001, four member companies of the Green Power Market Development Group have implemented or signed contracts for new green power projects and purchases at over 50 of their US facilities in 12 states. These projects include a variety of procurement strategies including participation in green power pricing programs, purchase of green tags, and installation of on-site distributed generation equipment. They also reflect a diverse array of green power options, including wind, geothermal, solar photovoltaic, direct use of landfill gas, landfill gas-to-electricity, and blended electricity (e.g., power from both landfill gas and small hydroelectric plants).

www.thegreenpowergroup.org

United Nations Commission for Sustainable Development

Mission:

The Division for Sustainable Development serves as the substantive secretariat responsible for servicing the Commission on Sustainable Development; for follow-up of the implementation of Agenda 21 as well as the Plan of Implementation (POI) of the World Summit on Sustainable Development.

The Division's responsibilities have grown considerably as a result of the World Summit on Sustainable Development. The Summit underscored the significance of the work of the United Nations on sustainable development and also required the Secretariat to undertake additional responsibilities, which include, among others, partnerships, consumption and production patterns, mining and minerals.

www.un.org/esa/sustdev

The Gund Institute for Ecological Economics (Univ. of Vermont)

The Institute for Ecological Economics was established to fill the growing need to integrate the study and management of "nature's household" (ecology) and "humankind's household" (economics). *Ecological Economics* is the name given to the effort to transcend traditional disciplinary boundaries in order to address the interrelationships between ecological and economic systems in a broad and comprehensive way. Ecological economics is not intended to replace either ecology or economics, but to draw on the best of both disciplines without being bound by them in order to create an effective and essential synthesis.

www.uvm.edu/giee/

Center for Sustainable Enterprise, UNC

The Center for Sustainable Enterprise offers education programs; research and outreach to help companies and non-profit organizations grow and profit in non-traditional and emerging markets with economically, environmentally and socially sustainable strategies.

www.bschool.unc.edu/sei/overview.htm

Global Business Network (GBN)

Global Business Network was created in 1987 around a pool table in a Berkeley, California basement by five friends. These GBN cofounders envisioned a worldwide learning community of organizations and individuals—a network, connected by the open and generous exchange of ideas, "out-of-the-box" scenario thinking, ruthless curiosity, and exciting new information technologies.

During the late 1980s, when GBN was founded, signs of significant change—even discontinuity—were emerging in the business environment, driven by a convergence of technological, social, political, economic, and environmental forces. GBN's cofounders were convinced that the business community—not government—was most likely to translate emerging opportunities into sustainable growth and a better future. The challenge: encouraging companies to question—and change—their mental maps, to embrace uncertainty, and to stop predicting the future based on the past.

www.gbn.org/

Environmental Entrepreneurs (E2)

Environmental Entrepreneurs (E2) is a national community of business people who believe in protecting the environment while building economic prosperity. Working with NRDC (Natural Resources Defense Council), E2 serves as a champion on the economic side of good environmental policy by taking a reasoned, economically sound approach to environmental issues. E2 works at both the state and national levels through its bipartisan efforts.

www.e2.org/ext/index.jsp;jsessionid=7EBD1BC4F1DD32B85EADD72185785F6

Livelihoods Connect (Canada)

Livelihoods Connect is DFID's learning platform for creating sustainable livelihoods to eliminate poverty. It provides a suite of information sharing, learning and management tools for: all DFID advisers and programme officers; NGOs and consultants working with DFID; and international organizations such as the EC, World Bank, FAO and IFAD.

Livelihoods Connect will ultimately engage a wide audience, but is initially focusing on a smaller group to help ensure that it can be responsive to needs and be of high quality.

The goal of Livelihoods Connect is to enable the practical implementation of the sustainable livelihoods approach as part of DFID's commitment to the International Development Targets. Livelihoods Connect helps practitioners' to organise and share their experience of implementing sustainable livelihoods approaches so everyone can learn. It also helps to support and enable networks, particularly between practitioners and researchers, around SL themes.

www.livelihoods.org/

Leadership for Environmental and Development (LEAD) International

Mission:

LEAD's mission is to create, strengthen and support networks of people and institutions promoting change towards sustainable development – development that is economically sound, environmentally responsible and socially equitable.

www.lead.org/default.cfm?target=aboutlead

SustainAbility

Who - or what - is SustainAbility?

They are a strategic management consultancy and think-tank. Founded in 1987, they are the longest established international consultancy dedicated to promoting the business case for sustainable development.

Their core business is consultancy, but they also have major research programs and publish a range of reports and books. They also address conferences, seminars and workshops worldwide.

- Consultancy services.
- Research Programs.
- Publications.

They are a for-profit limited company, although many of their key goals are non-financial. These non-financial goals are spelled out in their Mission Statement, first produced in 1990.

- SustainAbility's mission statement.

SustainAbility is not a marketing or PR agency. Nor are they neutral in their work: they take a public stance on issues, which they think are important. Even so, they do help clients to develop strategies and products tailored to market needs and expectations, and the communication side of their work is enormously important.

www.sustainability.com

International Institute for Sustainable Development

For development to be sustainable it must integrate environmental stewardship, economic development and the well-being of all people—not just for today but for countless generations to come. This is the challenge facing governments, non-governmental organizations, private enterprises, communities and individuals.

The International Institute for Sustainable Development meets this challenge by advancing policy recommendations on international trade and investment, economic policy, climate change, measurement and indicators, and natural resource management to make development sustainable. By using Internet communications, we cover and report on international negotiations and broker knowledge gained through collaborative projects with global partners, resulting in more rigorous research, capacity building in developing countries and a better dialogue between North and South.

<http://iisd1.iisd.ca/>

Rocky Mountain Institute

Rocky Mountain Institute is an entrepreneurial nonprofit organization that fosters the efficient and restorative use of natural, human and other capital to make the world more secure, just, prosperous, and life sustaining. We do this by inspiring business, civil society, and government to design integrative solutions that create true wealth.

www.rmi.org

World Environment Center

The World Environment Center (WEC) is an independent, not-for-profit, non-advocacy organization. Working with the private sector, international organizations, non-governmental organizations and academia, the WEC advances sustainable development by encouraging environmental leadership, helping improve health and safety practices worldwide, and fostering the efficient use of natural resources to protect the global environment.

<http://www.wec.org/>

Initiatives

Alliance for Environmental Innovation (AEI)

The precedent for the Alliance was set by the groundbreaking partnership between Environmental Defense and McDonald's Corporation, which resulted in over 40 strategies for fast food companies to reduce waste and encourage recycling. In 1994, Environmental Defense and the Pew Charitable Trusts jointly established the Alliance for Environmental Innovation to continue to develop and replicate the success of this partnership approach.

www.environmentaldefense.org/alliance

Sustainable Resources 2003

Sustainable Resources 2003 will provide a new platform of exchange where poverty issues faced by the developing world can be addressed globally and solved locally. The overall technical program of the conference is designed around the Millennium Development Goals selected by the United Nations on September 18, 2000.

Sustainable Resources 2003 will provide unique opportunities for non-profits, NGOs, donors, funding agencies, humanitarian organizations, educators, engineers, business people, volunteers, students, and representatives of developing communities to meet, learn from each other, network, discuss new approaches for outreach, and create new partnerships. Such organizations have not traditionally interacted in the past.

Sustainable Resources 2003 will provide a “meeting of the mind” and a platform for multidisciplinary exchange. It will also help develop recommendations toward a cooperative action plan in the areas of concern to the developing world.

Sustainable Resources 2003 will consist of a combination of keynote lectures, technical and non-technical presentations, case studies, cooperative problem solving, workshops on the major issues facing developing communities: water, sanitation, infrastructure, energy, shelter, health and hygiene, economic development, security, strategy, whole systems design, food and nutrition, social and cultural concerns, communications, and environment.

www.carebridge.info/sr2003/

SustainAbility Advance

<http://www.sustainability.com/home.asp>

Energy Star

ENERGY STAR is a government-backed program helping businesses and individuals protect the environment through superior energy efficiency.

<http://www.energystar.gov/>

Green Power Market Development Group

The Green Power Market Development Group is a collaboration of 12 leading corporations and the World Resources Institute dedicated to building corporate markets for green power. Our goal is to develop corporate markets for 1000 MW of new, cost competitive green power by 2010.

<http://www.thegreenpowergroup.org/>

Sustainable Enterprise Initiative (WRI)

The Sustainable Enterprise Summit engages the corporate community on agenda-setting environment and business issues. It is WRI's premiere business event and outreach vehicle for bringing sustainable enterprise initiatives to a wide corporate audience.

http://projects.wri.org/project_description.cfm?ProjectID=159

Global Environmental Management Initiative (GEMI)

Vision:

To be globally recognized as a leader in providing strategies for businesses to achieve EHS excellence, economic success, and corporate citizenship.

Mission:

Business helping business improve EHS performance, shareholder value, and corporate citizenship.

www.gemi.org

WBCSD Eco-efficiency Indicators Project

<http://www.wbcd.ch/templates/TemplateWBCSD1/layout.asp?type=p&MenuId=MzI4&doOpen=1&ClickMenu=LeftMenu>

Planetnetwork: Networking A Sustainable Future

This gathering brings together, in rare dialogue, representatives from information technology, environmental advocacy, sustainable living, peace and social justice activism, independent media pioneers, progressive entrepreneurship, software development, online communities and many others to examine critically - and collaboratively - where we are, and what is possible.

<http://www.planetwork.net/2003conf/textpages/main7-3-03.html>

Sustainable Development

Leadership Examples

Leadership Examples

Consumer Awareness

Center for New American Dream

The Center for a New American Dream helps Americans consume responsibly to protect the environment, enhance quality of life and promote social justice.

<http://www.newdream.org/>

Redefining Progress (E.O. Wilson Initiative)

Redefining Progress works with a broad array of partners to shift the economy and public policy towards sustainability

www.rprogress.org/

Mainstream Media project

The Mainstream Media Project is a nonprofit public education organization that places top policy analysts and social innovators on radio stations across the country and around the world. The project organizes its efforts into educational campaigns on particular themes lasting between one week and three months. Campaign participants include leading policy analysts, prominent scientist, former military officers, current and former high-ranking government officials, and heads of major public affairs organizations. The project focuses on current news events to bring the attention of producers and the public to the larger questions surrounding these issues. Addressing critical issues, the project aims to reach the majority of Americans who listen to talk radio with information and perspectives they seldom hear. The project seeks to re-establish a healthy balance in the national debate by introducing a vital new generation of informed and persuasive voices to the mainstream broadcast media

www.mainstream-media.net/home.cfm

Circle of Life Foundation

Founded in 1999 by Julia Butterfly Hill, Circle of Life activates people through education, inspiration and connection to live in a way that honors the diversity and interdependence of all life. They believe that you, yes you, make the difference in the world.

www.circleoflifefoundation.org/

Commercial Alert

Commercial Alert's mission is to keep the commercial culture within its proper sphere, and to prevent it from exploiting children and subverting the higher values of family, community, environmental integrity and democracy.

www.commercialalert.org/

The Satyana Institute

The Satyana Institute is a non-profit training organization. Their mission is to support individuals, communities, and organizations to combine inner work of the heart with outer service in the world. The Institute has two major program areas, Gender Reconciliation and Leading with Spirit.

www.satyana.org/

Innovative Policies

Vote Solar Initiative

Mission:

The Vote Solar Initiative's mission is to promote a national transition to clean energy by empowering city governments to implement large-scale, cost-effective solar projects.

www.votesolar.org

Green Scissors

Since 1994, the Green Scissors Campaign, led by Friends of the Earth, Taxpayers for Common Sense and U.S. Public Interest Research Group, has been working with Congress and the Administration to end environmentally harmful and wasteful spending. Working to breach party lines, the Green Scissors Campaign has helped cut more the \$26 billion in environmental wasteful programs from the federal budget.

www.greenscissors.org

Union of Concerned Scientists

UCS is an independent nonprofit alliance of 60,000 concerned citizens and scientists across the country. We augment rigorous scientific analysis with innovative thinking and committed citizen advocacy to build a cleaner, healthier environment and a safer world.

<http://www.ucsusa.org/>

Local Government Commission

The Local Government Commission assists local governments in establishing and nurturing the key elements of livable communities:

- a healthier human and natural environment,
- a more sustainable economy,
- an actively engaged populace, and
- an equitable society.

LGC assists local governments in developing and implementing policies and programs that help establish these key elements by:

- Facilitating conferences, regional workshops and other partnering opportunities;
- Producing guidebooks, videos, slide shows, and several monthly newsletters that share policy and project ideas;
- Providing an extensive resource library run by qualified staff;
- Providing an e-mail alert service that shares information on available state and federal grants.

www.lgc.org

Demand for Green Products

Recycled Products Purchasing Cooperative

The overall volume that the Co-op represents has motivated the RPPC's suppliers to provide recycled paper and other products at significantly reduced rates. Membership in the Co-op is convenient and easy. There are no membership fees and bulk purchases do not need to be made to receive competitive pricing. RPPC membership is open to businesses and public entities. The Co-op is open for enrollment in every state in the U.S.

www.recycledproducts.org

The Markets Initiative (Canada)

Markets Initiative works directly with Canadian companies to develop practical and economic ways to shift their wood and paper use away from ancient and endangered forest products to ecologically sound alternatives. They work through the entire supply chain and stimulate the market demand for alternative products.

During the past 3 years, Markets Initiative has worked with Canadian book publishers, printers and mills to help them find and develop papers that are free of ancient or endangered forest fibre. Their work with the Canadian publishing sector has been groundbreaking, garnered significant ecological savings and inspired similar work with publishers globally.

Markets Initiative is a coalition project of three environmental organizations - Friends of Clayoquot Sound, Greenpeace Canada and Sierra Club of Canada, BC Chapter.

www.marketsinitiative.org

The Food Alliance

Mission:

Food Alliance is a non-profit organization that promotes sustainable agriculture by recognizing and rewarding farmers who produce food in environmentally and socially responsible ways, and educating consumers and others in the food system about the benefits of sustainable agriculture.

www.thefoodalliance.org

Green Power Market Development Group

The Green Power Market Development Group is a collaboration of 12 leading corporations and the World Resources Institute dedicated to building corporate markets for green power. Their goal is to develop corporate markets for 1000 MW of new, cost competitive green power by 2010.

www.thegreenpowergroup.org/aboutus.html

Forest Stewardship Council

The Forest Stewardship Council is introducing an international labeling scheme for forest products, which provides a credible guarantee that the product comes from a well-managed forest. All forest products carrying their logo have been independently certified as coming from forests that meet the internationally recognized FSC Principles and Criteria of Forest Stewardship. In this way FSC provides an incentive in the market place for good forest stewardship. The forest inspections are carried out by a number of FSC accredited certification bodies, which are evaluated and monitored to ensure their competence and credibility.

FSC also supports the development of national and local standards that implement the international Principles and Criteria of Forest Stewardship at the local level. These standards are developed by national and regional working groups, which work to achieve consensus amongst the wide range of people and organizations involved in forest management and conservation in each part of the world. FSC has developed Guidelines for developing regional certification standards to guide working groups in this process.

www.fscoax.org

Co-op America

Mission:

Co-op America, a national nonprofit organization founded in 1982, provides the economic strategies, organizing power and practical tools for businesses and individuals to address today's social and environmental problems. While many environmental organizations choose to fight important political and legal battles, Co-op America is the leading force in educating and empowering their nation's people and businesses to make significant improvements through the economic system.

www.coopamerica.org

Corporate Accountability

ForestEthics

ForestEthics was founded in 1994 as the Clayoquot Rainforest Coalition (CRC). CRC focused on saving Clayoquot Sound, the largest remaining area of intact temperate rainforest on Vancouver Island on Canada's west coast. In 1996, CRC achieved a victory that preserved much of Clayoquot Sound from logging. CRC then expanded its mission to seek protection of the entire coastal rainforest of British Columbia, Canada's westernmost province, and became the Coastal Rainforest Coalition. After five years of intense campaigning, CRC was once again a key player in another victory for British Columbia's coastal rainforest, which led to one of the largest conservation agreements protecting temperate rainforests. The coalition was then restructured to create a new organization named ForestEthics. Its mission was broadened to protect all endangered forests by redirecting markets toward ecologically sound alternatives. Today, ForestEthics is a leader in the newest evolutionary wave of the environmental movement.

ForestEthics has helped pioneer a new approach to environmental activism by focusing its efforts on the marketplace. For every tree cut in an endangered forest there is a purchaser somewhere that funds this activity – often unwittingly. ForestEthics works to educate individual consumers, large corporate purchasers and distributors so they are aware of the environmental impacts and ethical dimensions of their purchasing decisions. Their goal is to harness this market power to stop destructive activities of certain logging companies while encouraging a shift toward environmentally preferable products.

www.forestethics.org

Rainforest Action Network

Rainforest Action Network works to protect the Earth's rainforests and support the rights of their inhabitants through education, grassroots organizing, and nonviolent direct action.

Since it was founded in 1985, the Rainforest Action Network has been working to protect rainforests and the human rights of those living in and around those forests. From the beginning, RAN has played a key role in strengthening the worldwide rainforest conservation movement through supporting activists in rainforest countries as well as organizing and mobilizing consumers and community action groups throughout the United States. Their first challenge was to bring the plight of the rainforests to public attention through education, communication, and direct action.

www.ran.org

Silicon Valley Toxics Coalition

Mission:

Silicon Valley Toxics Coalition (SVTC) envisions a sustainable world where a healthy environment is a right, rather than a privilege. To bring about this vision, they work for the empowerment of people locally, nationally and globally. They are a diverse, grassroots organization committed to the practice of social justice and multi-racial democracy.

www.svtc.org/svtc

Global Exchange

Global Exchange is an international human rights organization dedicated to promoting political, social and environmental justice globally. Since their founding in 1988, they have been working to increase global awareness among the U.S. public while building partnerships around the world.

www.globalexchange.org

Carbon Disclosure Project

The report was prepared for the Carbon Disclosure Project by Innovest Strategic Value Advisers, US specialists in environmental investment analysis.

The Carbon Disclosure Project is a special project of Rockefeller Philanthropy Advisers, with US IRS 501(c)3 charitable status, for the sole purpose of providing a co-ordinating secretariat for the participating funders and investors.

<http://194.242.156.103/cdproject/index.asp>

Campaign Exxon Mobile

Campaign ExxonMobil is a shareholder campaign to convince ExxonMobil to take a responsible position on climate change. Campaign ExxonMobil was founded by faith and environmental groups, and works with institutional investors, corporate governance activists and financial analysts to highlight the financial risks of ExxonMobil's current position.

www.campaignexxonmobil.org

CERES Sustainable Governance Project

Today, it is often difficult for corporations, activists and socially responsible investors to have honest, meaningful dialogue on corporations' environmental and social practices. CERES provides an innovative forum for this kind of exchange and a unique opportunity for real accountability and real results.

CERES is...

The leading U.S. coalition of environmental, investor, and advocacy groups working together for a sustainable future

Companies that have committed to continuous environmental improvement by endorsing the CERES Principles, a ten-point code of environmental conduct

A common ground where groups with widely different backgrounds, assumptions, and visions find concrete solutions to today's environmental challenges

www.ceres.org

Sustainable Business Practices

Alliance for Environmental Innovation (ARI)

The precedent for the Alliance was set by the ground-breaking partnership between Environmental Defense and McDonald's Corporation, which resulted in over 40 strategies for fast food companies to reduce waste and encourage recycling. In 1994, Environmental Defense and the Pew Charitable Trusts jointly established the Alliance for Environmental Innovation to continue to develop and replicate the success of this partnership approach

www.environmentaldefense.org/alliance/

Sustainable Cotton Project

Located on the northern end of the world's most productive agricultural region—California's Central Valley—the Sustainable Cotton Project (SCP) focuses on one of the most widely grown and chemical-intensive crops.

Since 1994, SCP has been building bridges between farmers, manufacturers and consumers to pioneer markets for certified organically grown cotton. SCP's guiding philosophy of "cooperation for a change" has fostered an unprecedented level of shared information among farmers, manufacturers and others in support of creating a new industry.

www.sustainablecotton.org

Organic Exchange

www.organicexchange.com.au/

The Natural Step (TNS)

Mission:

The Natural Step's mission is to accelerate global sustainability by guiding companies and governments onto an ecologically, socially and economically sustainable path. They are working together with some of the largest resource users on the planet to create solutions, innovative models and tools that will lead the transition to a sustainable future. A non-profit, international organization, they use a set of scientifically proven sustainability principles to transform debate into useful discussion and to drive innovation. Through cutting edge research, services and education they are helping to define the emerging field of sustainability and seeding the foundation for global transformation.

www.naturalstep.org/about/

World Resources Institute (WRI)

World Resources Institute is an environmental research and policy organization that creates solutions to protect the planet and improve people's lives.

WRI's work is concentrated on achieving progress toward four key goals:

- Protect Earth's living systems
- Increase access to environmental information
- Create sustainable enterprise and opportunity
- Reverse global warming.

WRI is an independent, non-partisan organization that works closely with governments, the private sector, and civil society groups in more than 100 countries around the world. Its strength is the ability to catalyze permanent change through partnerships that implement innovative, incentive-based solutions founded upon hard, objective data. WRI believes that harnessing the power of markets will ensure real, not cosmetic, change. WRI demands measurable results from its work; ideas must lead to action.

www.wri.org

Global Reporting Initiative (GRI)

The Global Reporting Initiative (GRI) is a multi-stakeholder process and independent institution whose mission is to develop and disseminate globally applicable Sustainability Reporting Guidelines. These Guidelines are for voluntary use by organizations for reporting on the economic, environmental, and social dimensions of their activities, products, and services. The GRI incorporates the active participation of representatives from business, accountancy, investment, environmental, human rights, and research and labor organizations from around the world. Started in 1997 by the Coalition for Environmentally Responsible Economies (CERES), the GRI became independent in 2002, and is an official collaborating centre of the United Nations Environment Program (UNEP) and works in cooperation with UN Secretary-General Kofi Annan's Global Compact.

www.globalreporting.org/

Factor 10 Institute

The Factor 10 Institute has been created to provide practical support for achieving significant advances in resource productivity in the production and consumption sectors through:

- The design of eco-efficient logistic systems, processes, and services;
- The development of dematerialized products, services, buildings, and infrastructures with high resource productivity;
- Appropriate marketing strategies, maintenance, recycling and disposal of goods;
- Enhancing consumer information on the environmental quality of products and services;
- The creation and performance of research and development plans;
- Offering seminars for firms, politicians and other interested people, giving practical advice for implementing the Factor 10 and the MIPS-concepts at home, in the public domain, in firms, and in governments;
- Small scale seminars for political and business leaders to identify long-term sustainable economic options;
- Forging coalitions among international initiatives for practical approaches toward sustainability, such as The Natural Step, Sweden, the Zero Emission Forum,

Japan, The Environmental Footprint, USA, and the Dutch Sustainable Technology Program.

The Factor 10 Institute takes particular interest in questions relating to the increase in employment and the sustainable financing of governments. It also provides services to the international Factor 10 Club.

www.factor10.de/

Rainforest Alliance & Chiquita

Chiquita Brands International, Inc. -- a global leader in banana production -- today announced that it has transformed its farming practices and led the way for the banana industry. The Rainforest Alliance monitors and verifies that Chiquita's farms abide by strong environmental and social standards, which have positive impacts on rural communities and tropical landscapes. By meeting the Rainforest Alliance's standards, Chiquita has improved water quality, instituted programs for recycling and safe waste disposal, dramatically decreased agrichemical use, and improved the quality of life of workers on all its company-owned farms in Latin America.

<http://www.sdearthtimes.com/et1200/et1200s10.html>

Sustainable Investing

Sustainable Asset Management (SAM)

SAM Sustainable Asset Management is an independent asset management company headquartered in Zurich, Switzerland. Established in 1995, SAM was among the first asset managers to specialize in the field of sustainability-driven investments.

www.sam-group.com

Dow Jones Sustainability Group

The Dow Jones Sustainability Group Index seeks to meet the financial markets demands for an investable index to benchmark the performance of investments in companies which are striving to become more sustainable.

www.mallenbaker.net/csr/CSRfiles/djsgi.html

Foundations

Wallace Global Fund

The Wallace Global Fund is guided by the vision of the late Henry A. Wallace, former Secretary of Agriculture and Vice-President under Franklin D. Roosevelt. Committed to serving the general welfare, his life exemplified farsightedness, global vision, and receptivity to new ideas. He was keenly interested in scientific innovation as a force to enhance human well-being and had an abiding faith in the individual's spirit and capacity to bring about sound and just social change. The Fund was established by his son, Robert B. Wallace (1918-2002) in 1995, and grew out of the Wallace Genetic Foundation, founded in 1965 by Henry A. Wallace.

www.wgf.org/

Rose Foundation for Communities and the Environment

Mission:

- Fostering community and environmental stewardship.
- Improving communications between businesses and their neighbors.
- Recognizing individual responsibility for the environmental consequences of personal actions.
- Forging positive links between environmental stewardship and sustainable job creation.
- Harnessing economic power to leverage environmental sustainability.
- Instilling respect for the inalienable rights protected by our nation's constitution and the essential human rights to clean air, clean water and individual dignity.

<http://www.rosefdn.org/>

AVINA Foundation

The AVINA Foundation works in partnership with civil society and business leaders in their initiatives toward sustainable development in Ibero-America.

http://www.avina.net/web/avinawebfinal3.nsf/LK_GCMask/HC522FBF2E7CFB944785256C3D006D396A?Open&LANG=Eng

CANOPUS Foundation (Germany)

CANOPUS' goal is to promote the implementation of Sustainable Development a concept outlined in AGENDA 21, the final document of the EARTH SUMMIT in Rio de Janeiro, 1992. CANOPUS' range of activities is exclusively international and its funding policy focuses on the following three thematic areas:

- Promotion and support of poverty reduction strategies, particularly through the use of sustainable and appropriate technologies
- Sustainable energy use, particularly applications of renewable energies
- Research and education on urban sustainable development (SD), including the promotion of youth organizations, networks and projects related to sustainable development

CANOPUS is affiliated with PerEnergy GmbH, which provides private equity for entrepreneurial initiatives in the field of clean energy technologies.

www.canopusfund.org/index.html

Measurements & Metrics

American Institute of Chemical Engineers Sustainability Metrics Project

The CWRT Sustainability Metrics (SM) working group has developed a set of baseline sustainability metrics and has an active project evaluating and testing these metrics in industry.

Goals:

- Be efficient and non-perverse (few, simple to collect, calculate and understand)
- Must have both business & environmental value (relevant to business, drives continued improvement and right behavior, related to economic criteria)
- Provide for growth (business value, standard of living, environmental quality)

www.aiche.org/cwrt/projects/sustain.htm

Dow Eco-Compass

Dow Chemical has developed an Eco-Compass to provide a simple, visual summary of the life-cycle data analysis. The compass draws heavily on WBCSD's eco-efficiency indicators, with some minor amendments. The eco-compass has six 'poles' -- energy intensity; mass intensity; environmental and health risk potential; sustainability of resource usage; extent of revalorization (reuse, remanufacturing, and recycling); and service intensity. Using the compass in product assessments requires intensive life cycle analysis data, but at a less intense level it can help highlight key areas of concern and be a useful communication tool to customers and other interested stakeholders.

www.wri.org/wri/meb/sei/state.html

SustainAbility/UNEP Environmental Reporting Framework

<http://www.brad.ac.uk/acad/envsci/Research/SB/CERs.PDF>
<http://www.unepie.org/outreach/reporting/sustainability-rpt.htm>

European ECO - Management and Audit Scheme

The overall objective of the scheme is to promote continuous environmental performance improvements of organizations as to evaluate and improve their environmental performance and provide relevant information to the public. The scheme does not replace existing Community or national environmental legislation.

<http://ewindows.eu.org/ManagementConcepts/EMAS>

Association of Chartered Accountants Environmental Performance Measurement Report

<http://www.acca.co.uk/publications/environment/>

ISO 14000

A complimentary method for achieving environmental protection is to use internal standards. This enables a company to integrate quality management systems within their business operations without relying solely on external laws. This is the basis for the ISO 14000 environmental management standards.

www.iso14000.com/

SA 8000

The Council on Economic Priorities Accreditation Agency has driven the development of Social Accountability 8000 (SA8000) a system that defines a set of auditable standards and an independent auditing process for the protection of workers' rights

www.citinv.it/associazioni/CNMS/archivio/lavoro/Presentazione_SA8000.html