

Battelle's Corporate Philanthropy Guidelines Investing in Communities for Impact

Caring For Our Communities

Battelle was established in 1929 through the Will of Gordon Battelle. Gordon Battelle envisioned an organization that could solve significant industrial and societal problems and give back to the community. Battelle is dedicated to improving the quality of life where our customers and employees live and work. Each year, we fulfill this commitment by distributing a portion of our net income to nonprofit organizations and government agencies which support improved education, arts and cultural programming, civic development and health and human services. Battelle encourages the development of community partnerships by promoting employee involvement in volunteer service and providing organizations with cash and in-kind distributions.

Focus on Education

Education is one of Battelle's founding purposes, and we are proud of our long history of philanthropic support through financial donations and the countless hours of volunteer service of our staff nationwide. Support to science, technology, engineering, and math education (STEM) is a special focus for Battelle given our work in innovation and research. We are highly interested in early childhood preparation, K-12 programs that encourage curiosity in STEM careers, efforts that enhance teacher professional development experiences, and programs that improve the general environment for innovative education reform. While science and math are emphasized, a broader objective is preparing our next generation with the technical literacy to make informed choices and contributions to our society, wherever their career interests may take them.

Because it is a signature area for Battelle, we are inclined to select well-constructed education programs that have the ability to be scaled or replicated in other locations. We are also influenced by an organization's ability to collaborate with others to maximize potential for national impact. At Battelle, we believe the ability for others to be informed and act through well-constructed, collaborative efforts is the key to community success.

Review Criteria

Each proposal submitted to Battelle is reviewed on a case-by-case basis. There are, however, general themes and review criteria evaluated consistently by the Battelle Charitable Distributions Committee prior to making recommendations to our CEO, the Battelle Foundation Fund at the Columbus Foundation, and in some cases, Battelle's Board of Directors. Battelle's charitable distributions must conform to the requirements of our agreement with the Ohio Attorney General.

We are interested in projects that can articulate the anticipated impact of the proposed effort and how Battelle's requested involvement is connected to those outcomes. We consider efforts that are local, regional, and national in scope, and are able to make the most impact in areas where we have a presence with our employees and our customers. We leverage the time and talent of our staff by using their expertise as consultants, board members and volunteers. We are also likely to consult with external advisors to help us reach an informed decision about our participation.

Capital Campaigns

Battelle's Charitable Distributions Committee has guidelines that mold the selection process in capital campaign requests. Participation in these campaigns is approached on a portfolio basis. Battelle strives to be responsive and helpful to appropriate capital projects in the regions where we operate. When considering a capital request, the decision to participate and the level of our involvement will be dependent on numerous factors. Among these are the consistency of the capital project with Battelle's mission and core purposes, our capacity to invest at the particular

time of the request, and other philanthropic and operational partners who are involved with the project.

Impact Monitoring

Battelle believes in long-term collaborative efforts with programs and projects in our giving focus. Multi-year collaboration proposals are reviewed on a case-by-case basis. To make sure that sustainable impact can be achieved through our distributions, Battelle often provides a donors objective document that outlines the desired outcome and the manner in which the progress toward that should be tracked.

Organizations requesting funds can request any amount however each request will be evaluated against a portfolio with other similar requests to determine the best and highest uses of Battelle's funds. Annual capacity for giving is also a primary determining factor in our ability to fund each request. Battelle's fiscal year runs October 1st through September 30th.

Requirements for Distribution Requests

- Written proposals for financial support are accepted throughout the year. Battelle's Charitable Distributions Committee meets several times per year based on need to review requests that fall within our funding focus. Proposals that do not meet the outlined requirements will not be considered for funding. A written response will be sent to all grant seeking organizations following the review process. If there is a deadline for response, please note this date in the proposal. We do our best to be flexible within constraints.
- Organizations requesting funds must be tax-exempt under Internal Revenue code 501(c)3 or a governmental agency. Battelle does not fund individuals, extracurricular school activities, courtesy advertisements, or religious, political or fraternal organizations.
- Distributions are primarily made to organizations and programs in areas where Battelle has a large business presence. Requests that are national in scope should be directed to Battelle's headquarters in Columbus, Ohio. Local annual appeals should be sent directly to our regional offices (please see full list at <http://www.battelle.org/locations/default.stm>)
- Proposals should include the following: organization mission statement; program description and evaluation mechanisms; list of current funders; financial statements including a synopsis of funds raised via the organization's board and constituency, corporations, and foundations; a current list of board members; recognition strategies for Battelle's support; and verification of nonprofit status including a copy of the IRS 501(c)3 determination letter. The effects of Battelle's support and outcomes of each project are key factors in our decision making process.
- Because of Battelle's increased support of United Way, member agencies' requests for general operating funds are not encouraged. Capital campaigns and special projects are reviewed on a case-by-case basis.
- Due to the large number of fundraising events, Battelle's decision to participate in any specific event will be based primarily on the following criteria: whether the event is the organization's major source of fundraising; whether a Battelle staff member serves on the organization's governing board; and whether there is a Team Battelle volunteer project associated with the organization.