

Annual Report 2021

Education and Research
Foundation of the Better
Business Bureau® of
Metropolitan New York, Inc.

Educating Charities, Businesses, Young
Professionals and Consumers:

- Charity Accountability
- Consumer Education & Fraud Prevention
- Corporate Responsibility
- High Standards in Business Practices
- Skill-Building for Volunteer Interns



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Metro New York's BBB® Foundation

In 1967, The Education and Research Foundation of the Better Business Bureau® of Metropolitan New York (BBB Foundation) was incorporated as a 501(c)(3) nonprofit organization with an independent board of directors. The BBB Foundation collaborates with Metro New York's BBB to create, fund, and implement special educational programs and research projects on consumer, business and philanthropic issues.

Mission

Support the Better Business Bureau by defining and promoting ethical business and charity standards and practices in New York.

Strategic Goals

With the guidance of its Board of Directors, BBB Foundation has established long-term strategic goals to achieve its mission. BBB Foundation activities are regularly evaluated against these goals:

- I: Charities will meet high standards of accountability.
- II: Donors will be empowered to make informed giving decisions and avoid fraud.
- III: Businesses will meet high standards of ethical business conduct.
- IV: Consumers will be empowered to make informed purchase decisions and avoid fraud.
- V: Current and future leaders of businesses and nonprofits will be provided with experiences that can help build knowledge, skills, and ethical decision-making abilities.
- VI: Organizational capacity will be enhanced through further development of board, staff, financial resources, partnerships and collaborations.

BBB Foundation Impact Snapshot, 2021

- **1,761** educational event and webinar participants
- **764** Metro NY BBB Charity Reports as of 11/21 measurement point
- **36** volunteer interns with **8,381** hours of training and service
- Tracked **8.2 million visits** to BBB Metro NY Business Profiles and Charity Reports (combined) by **6,331,737 unique users**

Core Program: Charity Accountability

BBB Foundation of Metro New York promotes accountability for local charities, helps establish confidence in the nonprofit sector, and encourages charitable giving in New York. It achieves these aims by:

- publishing BBB Charity Reports on 764+ Metro New York area charities
- informing the public about how to identify accountable charities
- urging potential donors to Give Online With TrustSM to trustworthy charities, and
- helping charities to meet and maintain high standards in their practices

The BBB Foundation's overall activities, including the core Charity Accountability Program, were substantially funded in 2021 through **2,752 unique voluntary general operating donations** (up by 515 or 23% from 2020, and comparable to the prior 2,756 number of donations in 2019) provided **by BBB Accredited Businesses** beyond their accreditation fees, as well as by fees earned through the BBB Accredited Charity Seal program. We thank **The New York Community Trust** for its generous support of the Charity Accountability Program as well as the Charity Effectiveness Program Series.

Although 2021 continued to be a pandemic year, Accredited Business donations totaled \$126,332 in 2021 versus \$97,494 in 2020, an increase of \$28,828 or 29.6%. This also represented a slight increase in average donation by BBB Accredited Businesses from \$43.58 in 2020 to \$45.90 in 2021 – a heartening testament to ongoing Accredited Business support of the Foundation's mission, programs, and activities in yet another challenging pandemic year.

Metro New York's BBB Charity Accountability Program (NYCAP), formerly known as the New York Philanthropic Advisory Service (NYPAS), was launched in 1987 – 35 years ago. A separate Long Island-focused charity reporting program began in 1995. These two programs merged at the close of 2000, establishing one of the largest regional BBB charity accountability programs in the U.S. In 2017, NYCAP began providing charity evaluation services to the BBB of Upstate New York; as a result, it now develops BBB Charity Reports for the whole state of New York. It also develops Charity Reports for Connecticut and New Jersey BBBs upon request.

Each year, BBB Foundation program staff members review hundreds of financial statements, tax filings, annual reports, websites, fundraising solicitations, governance information, and other submissions from charities all over New York State. This voluntarily disclosed information is evaluated to determine whether a charity is employing the guideline practices noted in the 20 BBB Standards for Charity Accountability. BBB Foundation then produces a BBB Charity Report with the findings and a summary of the charity's mission, activities, governance, and key financial information. Thousands of BBB Charity Reports on organizations of significant public interest are available online at ny.give.org, give.org, newyork.bbb.org and bbb.org.

BBB Foundation's Charity Accountability Program also monitors issues affecting the local nonprofit community and provides public education on charitable management and philanthropic issues through events, alerts, media interviews, consultations with government regulators and nonprofit associations, collaborations, articles, speaking engagements, and participation in nonprofit convenings. Media, businesses, associations, government agencies, and other nonprofits call upon Metro New York's BBB Foundation to provide expert insights on charity accountability issues.

BBB Educational Programs for Nonprofits

Throughout the year, BBB Foundation offers educational conferences and workshops, when in-person events are possible, and webinars. These programs are intended to inform charity and philanthropy leaders about the latest issues and practices relating to nonprofit impact and effectiveness. In addition, BBB Foundation provides a series of free live workshops (when feasible), online webinars, and recorded tutorials about the BBB Standards for Charity Accountability. The goal is to help charity leaders, advisors and others understand how charities can meet the BBB's comprehensive performance standards and learn why these recommended practices are valuable for nonprofits.

BBB Charity Effectiveness Program Series

In 2021, we deeply appreciated receiving the generous support of **American Express, The New York Community Trust, PNP Staffing Group, and PwC New York** for support of the 2021 Charity Effectiveness program series. We were also grateful for special program support in 2021 from **BDO FMA** (for the Symposium event), and from **EisnerAmper, GRF CPAs & Advisors, and Grassi Advisors & Accountants**.

Due to continuing risks presented by the COVID-19 pandemic, programs in the 2021 series were presented online as webcasts.

Given difficulties faced by charities in that year, and noting evidence that interest in programs was high but registrations decreased when webinars were offered for a small cost, **admission fees were dropped after March 2021**. Programs during the rest of the year were offered for free. **This represented a moderate financial loss in terms of foregone admission fees, but enabled the Foundation to offer programs more widely through other BBB organizations in North America, at no cost, in service to the BBB Foundation's educational mission during the ongoing pandemic.**

Summary of activities:

- **BBB Charity Effectiveness Symposium XV, February 23, 2021 "Online Edition"**: The BBB Foundation's fifteenth Charity Effectiveness Symposium was entitled **Building Bridges: Powering Your Mission Through a Time of Transition**. It was presented online and offered to participants nationally. The keynote speaker was Tanuja Dehne, President & CEO of The Geraldine R. Dodge Foundation. Yancy Rubén Garrido, Senior Program Officer of The Clark Foundation, moderated a panel discussion by several nonprofit leaders. James G. Sheehan, Chief of the New York State Charities Bureau, delivered a regulatory perspective in closing remarks. The keynote speaker and panelists discussed strategies for navigating the major disruptions caused by the pandemic, and shared insights about how they were shifting their efforts to address issues and problems arising out of these events. There were 139 event registrants, not including speakers. On the event day, we noted attendance by 110 participants plus 6 speakers, for a total of 116.
- **Webinar, January 19, 2021**: With sponsorship from GRF CPAs & Advisors (GRF), the BBB Foundation presented **Managing Change: Streamlining Your Finances and Operations for Sustainability** as a free, online event. The featured speakers from GRF were Elinor Litwack, CPA, Partner, Outsourced Accounting & Advisory Services; Melissa Musser, CPA, CITP, CISA, Principal, Risk & Advisory Services; and Hilleary Abbruzzese, CPA, Manager, Outsourced Accounting & Advisory Services. The program covered issues such as options to streamline operations and lower costs; evaluating tech upgrades; aligning risk management with sustainability goals; employee buy-in and training, and more. BBB Wise Giving Alliance and other BBB

organizations were Event Supporters. There were 77 event registrants, not including the speakers. On event day we logged 57 participants plus the 3 speakers for a total of 60.

- **Webinar, March 24, 2021:** With generous sponsorship from EisnerAmper LLP, the BBB Foundation presented **Sustainability Strategies and Tactics** as a webcast. Presenters were Candice Meth, CPA, Partner, Not-for-Profit Services of EisnerAmper, and Timothy Schroeder, CPA, Senior Manager, Not-for-Profit Services of EisnerAmper. The speakers discussed sustainability tools, strategies, liquidity issues, and steps to take when cutbacks are necessary during pandemic times. Nonprofit New York, Support Center, BBB Wise Giving Alliance and other BBB organizations were Event Supporters. Although there were 353 clicks to the registration page, there were 21 registrants and 17 attendees, not including the two speakers. Following this experience, program registration fees were dropped for the rest of the 2021 calendar year to encourage attendance during difficult pandemic times.
- **Webinar, April 20, 2021:** With welcome sponsorship from EisnerAmper, the BBB Foundation presented a free webcast entitled **Lessons Learned: Prepping for Your Next Audit**. The speakers were Candice Meth, CPA, Partner, Not-for-Profit Services, and Timothy Schroeder, CPA, Manager, Not-for-Profit Services, of EisnerAmper. The presenters discussed how to cope with issues arising as many charities were preparing for financial audits in remote work situations, due to the pandemic. They offered prep tips, lessons learned, best practices, insights on internal controls during work from home times, and more. Event Supporters included Candid, BBB Wise Giving Alliance, and other BBB organizations. This webcast drew 161 registrants, of which 101 attended, plus the two speakers.
- **Webinar, May 26, 2021:** Thanks to generous sponsorship from Grassi Advisors & Accountants, the BBB Foundation presented **Building Stronger Board Practices: Practical Steps for Pandemic Times and Beyond**. Speakers for the program included David M. Rottkamp, CPA, Partner, Not-for-Profit Practice Leader, and Elizabeth Gousse Balotte, CPA, Principal, Not-for-Profit Practice, of Grassi Advisors & Accountants. Event supporters for this webinar included the Association of Nonprofit Specialists, BBB Wise Giving Alliance, Center for Nonprofit Leadership at Adelphi University, Human Services Council, and other BBB organizations. For this webinar there were 403 registrants and 173 live attendees on program day, not including the two speakers.
- **Webinar, November 18, 2021:** With generous sponsorship from American Express, the BBB Foundation presented **Funding the Future**. This online panel discussion was led by Richard Brown, Vice President, Philanthropy of American Express, who is a BBB Foundation Board member. Funder panelists included: Carolyn C. Cavicchio, President of the S&P Global Foundation; Michelle A. Nicholas, Senior Vice President, Chief Diversity Officer and Director of Community Development at PCSB Bank; and Ana L. Oliveira, President & CEO of The New York Women's Foundation. The panelists discussed how their grant-making has changed due to the pandemic, as well as anticipated areas of grant-making focus for the future. Event Supporters included BBB Wise Giving Alliance, Candid, the Center for Nonprofit Leadership at Adelphi University, Human Services Council, and BBB organizations across the country. There were 251 registrants and 117 attendees, not including the 4 speakers.
- **Webinar, December 14, 2021:** With generous sponsorship from American Express, the BBB Foundation presented **Learning from the Arts: Insights on Resilience and Cultural Leadership**. This online panel discussion was led by Christine Yoon, Senior Program Officer, The Wallace Foundation. The discussants included: Lisa

Richards Toney, President & CEO, Association of Performing Arts Professionals; Kevin Kim Wright, Chief Program Officer, Urban Arts Partnership; and Stephanie Ybarra, Artistic Director, Baltimore Center Stage. Representing a diverse array of disciplines, the panelists shared their viewpoints about how they are managing to navigate the tough pandemic environment for arts organizations. The Association of Nonprofit Specialists, BBB Wise Giving Alliance, Candid, Center for Nonprofit Leadership at Adelphi University, Human Services Council, Nonprofit New York, Staten Island Not for Profit Association and other BBB organizations were Event Supporters. This nationally offered webcast attracted 111 registrants, of which 54 attended, plus the 4 speakers.

- ***Email Promoting 2021 Symposium Video on February 3, 2022:*** The online resource, entitled ***Learn About Charity Effectiveness***, is currently in update status due to changes in the website platform. In the meantime, we made the 2021 Symposium videos widely available to our entire charity email list, as well as BBBs across North America, in an email sent out on February 3, 2022. That email also promoted the 2022 online Symposium, which was offered nationally at no cost.
- ***Program Assessment:*** We asked attendees at our Symposium and five additional workshops throughout the 2021 year to evaluate the programs. In a remote pandemic scenario, attendees provided evaluation feedback far less often. When present at in-person programs in the past, they filled out paper surveys in substantial numbers, but seemed much less inclined to complete online surveys. However, we did gather some feedback responses and have used these insights to plan additional charity effectiveness programs.

Symposium 2021 Event Supporters: Association of Development Officers; Association of Nonprofit Specialists; Baruch College/Austin W. Marxe School of Public and International Affairs; Candid; Center for Nonprofit Leadership at Adelphi University; Human Services Council; New York Council of Nonprofits; Nonprofit New York; Philanthropy New York; Support Center; BBB Wise Giving Alliance; and BBB organizations across the country.

Learn About Charity Effectiveness Video Resource:

Promotion of 2021 Symposium Videos

Videos of the 2021 Symposium online proceedings were shared widely with charity leaders in our Metro New York area, as well as through BBB organizations across the U.S., via email. The website resource of prior Charity Effectiveness Symposia videos is being redeveloped, due to the migration of the BBB.org website to a new platform created by the International Association of Better Business Bureaus. It will be re-launched when possible.



View Videos Now!

2021 BBB Charity Effectiveness Symposium XV

Building Bridges: Powering Your Mission Through a Time of Transition



If you missed the fifteenth **BBB Charity Effectiveness Symposium** on February 23, 2021, you can now view videos of the event.

Click each image below to see videos of these 2021 program speakers.

Watch: 2021 BBB Charity Symposium Videos



Keynote

Tanuja Dehne

President & CEO

The Geraldine R. Dodge Foundation

Leadership Panel

Yancy Rubén Garrido,

Moderator

Senior Program Officer
The Clark Foundation

• **Dr. Roderick L. Jones**

Executive Director
Goddard Riverside

• **Dr. Jeremy C. Kohomban**

President and CEO



• **Sheena Wright**

President and CEO
United Way of New York City

(as of February 23, 2021)



Closing Remarks

James G. Sheehan, Esq.

Chief, Charities Bureau
New York State Office of the
Attorney General

Charity Effectiveness Series Webinars in 2021


January 10, 2021



January 19, 2021
Webcast, 1:00 - 2:30 pm ET
Managing Change:
**Streamlining Your
Finances and
Operations for
Sustainability**
**Register
Now**

The January 19, 2021 program, ***Managing Change: Streamlining Your Finances and Operations for Sustainability***, was generously sponsored and presented by GRF CPAs & Advisors. The speakers included: Elinor Litwack, CPA, Partner, Outsourced Accounting & Advisory Services; Melissa Musser, CPA, CITP, CISA, Principal, Risk & Advisory Services; and Hilleary Abbruzzese, CPA, Manager, Outsourced Accounting & Advisory Services.

February 23, 2021



 **BBB Charity Effectiveness
Symposium XV**
BBB Online Edition

**Building Bridges:
Powering Your Mission
Through a Time
of Transition**
February 23, 2021
12:30 - 2:30PM EST

**Register
Now**

On February 23, 2021, we offered the BBB Charity Effectiveness Symposium to a national audience via webinar for the first time, in collaboration with other Better Business Bureau organizations. Entitled ***Building Bridges: Powering Your Mission Through a Time of Transition***, this program featured Keynote remarks by Tanuja Dehne, President &

CEO, of The Geraldine R. Dodge Foundation. This was followed a panel discussion led by Yancy Rubén Garrido, Senior Program Officer of The Clark Foundation. Panelists included Dr. Roderick L. Jones, Executive Director, Goddard Riverside; Dr. Jeremy C. Kohomban, President and CEO, of The Children’s Village; and Sheena Wright, President and CEO of United Way of New York City. James G. Sheehan, Esq., Chief, Charities Bureau, Office of the New York State Attorney General, delivered a regulatory update in his Closing Remarks.

March 24, 2021

Our March 24, 2021 webinar, ***Sustainability Strategies and Tactics: Planning the Path Forward***, was generously sponsored and presented by EisnerAmper. Our speakers for this program were Candice Meth, CPA, Partner, Not-for-Profit Services; and Timothy Schroeder, CPA, Senior Manager, Not-for-Profit Services, of EisnerAmper.



March 24, 2021
Webcast, 1:00 - 2:30 pm ET

**Sustainability
Strategies
and Tactics:**
Planning the Path Forward

Register Now



April 20, 2021



April 20, 2021
Webcast, 1:00 - 2:30 pm ET

**Lessons
Learned:**
Prepping for
Your Next Audit

Register Now



On April 20, 2021, we offered the webinar **Lessons Learned: Prepping for Your Next Audit**, which was generously sponsored and presented by EisnerAmper. Registration fees were dropped for this webinar and for all remaining programs in the calendar year. This webinar and all subsequent webinars were also offered nationally. Our speakers for this program included Candice Meth, CPA, Partner, Not-for-Profit Services; and Timothy Schroeder, CPA, Senior Manager, Not-for-Profit Services, of EisnerAmper.

May 26, 2021



No Cost Online Event!



May 26, 2021 1:00 - 2:30 pm ET

Building Stronger Board Practices

Practical Steps for Pandemic Times and Beyond

Register Now

On May 26, 2021, we were pleased to deliver the webinar **Building Stronger Board Practices: Practical Steps for Pandemic Times and Beyond**, with generous sponsorship and a presentation from Grassi Advisors & Accountants. Program speakers included David M. Rottkamp, CPA, Partner, Not-for-Profit Practice Leader; and Elizabeth Gousse Balotte, Principal, Not-for-Profit Practice, of Grassi Advisors & Accountants.

November 18, 2021



November 18, 2021

Webcast, 1:00 - 2:30 pm ET

Funding the Future

Free Online Event

Panel Moderator

Richard Brown

Vice President, Philanthropy
American Express
Panel Moderator

Register Now

Funding the Future, a free online webinar, was presented on November 18, 2021, with generous sponsorship from the year-long series Patron Sponsor, American Express. Richard Brown, Vice President, Philanthropy of American Express led a panel discussion by funders about how funding practices were changing during the pandemic. Panelists included: Carolyn C. Cavicchio, President, S&P Global Foundation, and Director, Corporate Responsibility, of S&P Global; Michelle A. Nicholas, Senior Vice President, Chief Diversity Officer, and Director of Community Development at PCSB Bank; and Ana L. Oliveira, President & CEO, of The New York Women's Foundation.

December 14, 2021



BBB December 14, 2021
Webcast, 1:00 - 2:30 pm ET

**Learning from the Arts:
Insights on Resilience
and Cultural Leadership**

Free Online Event

Panel Moderator
Christine Yoon
Senior Program Officer, Arts
The Wallace Foundation
Panel Moderator

**Register
Now**

Our final webinar of the year, ***Learning from the Arts: Insights on Resilience and Cultural Leadership***, was generously sponsored by series Patron Sponsor American Express. It was offered online to a national audience on December 14, 2021. Christine Yoon, Senior Program Officer, Arts of The Wallace Foundation moderated a panel discussion by arts leaders from various disciplines. Discussants included: Lisa Richards Toney, President & CEO, Association of Performing Arts Professionals; Kevin Kim Wright, Chief Program Officer, Urban Arts Partnership; and Stephanie Ybarra, Artistic Director, Baltimore Center Stage.

BBB Charity Standards Briefings in 2021

In 2021, BBB Foundation continued its series of no-cost workshops about the BBB Standards for Charity Accountability. These programs are presented to groups of nonprofit leaders, board members and consultants, often in the BBB's own conference room. During the COVID-19 pandemic, we shifted to webcasts for most of these workshops.

When invited to do so, BBB Foundation will also present programs at no-cost for audiences recruited by other organizations. There were 6 Standards programs in 2021, with 67 attendees in all.

At each session, BBB Foundation staff members provide a comprehensive look at the Standards, offering guidance about how to meet each one, and additional related information. Charity leaders are encouraged to ask questions and provide feedback about the Standards at such programs. Interesting questions and insights from attendees are provided to the BBB Wise Giving Alliance for their consideration.



Welcome to the Webinar!

BBB® Standards for Charity Accountability

How Meeting Them Can Benefit Your Nonprofit

December 9, 2021



Today's Speaker



Mara McGuinness
Director, Charity Accountability Program
Education and Research Foundation of the BBB of Metropolitan New York

Start With Trust

Start With Trust

2021 BBB Charity Standards Workshops: 67 attendees in all

February 2, 2021	Webinar (10 attendees)
April 7, 2021	Webinar (21 attendees)
June 22, 2021	Webinar (7 attendees)
August 18, 2021	Webinar (12 attendees)
October 20, 2021	Webinar (7 attendees)
December 9, 2021	Webinar (10 attendees)

Video recordings of recent webcasts are posted online through the Foundation's charity resource web pages at ny.give.org, to benefit those nonprofit leaders who may prefer to view the content at times and in ways of their choosing.



View Our April, 2022 Webinar

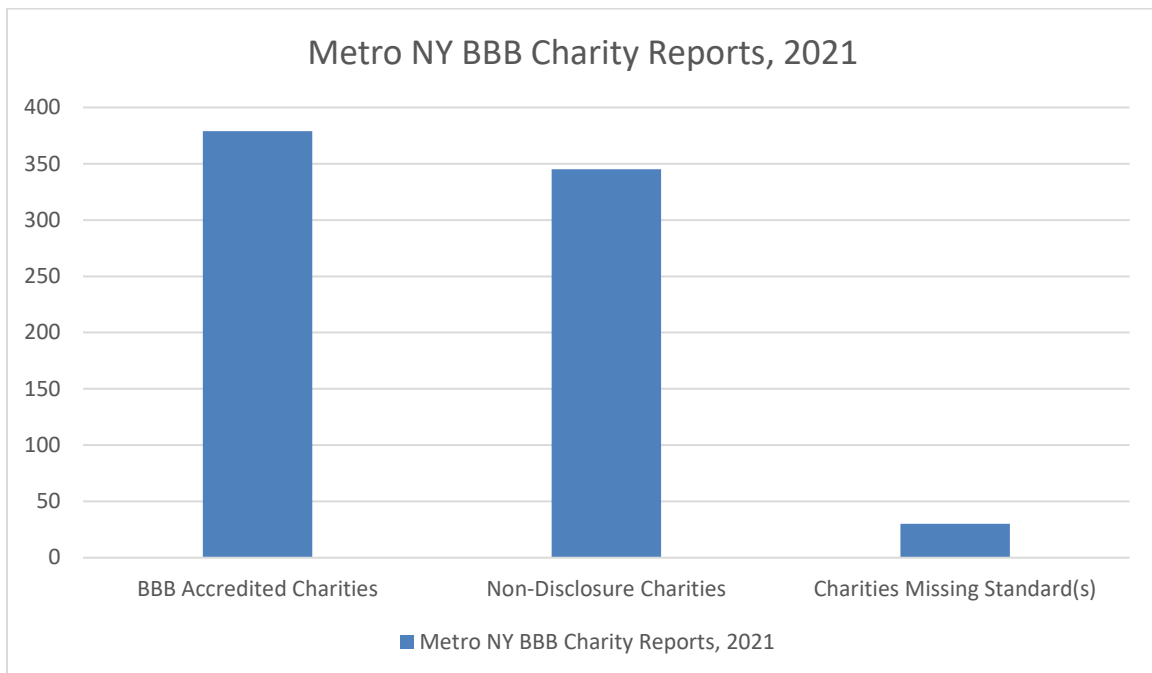
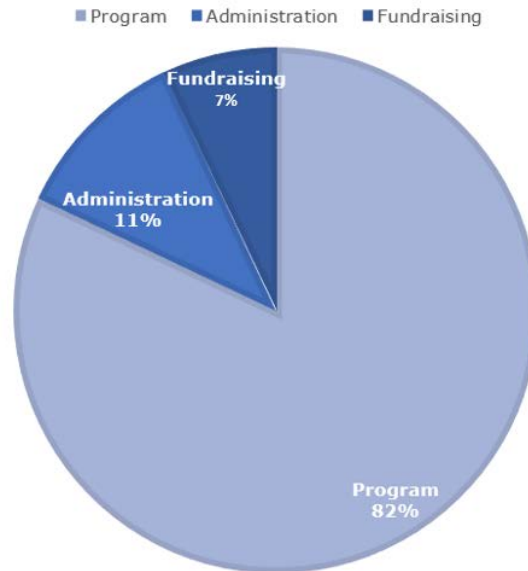
Watch our April, 2022 Webinar where we discuss the 20 BBB Standards for Charity Accountability, recommended practices and how meeting these Standards can benefit your Nonprofit.

Overview of Charity Accountability Program, 2021

764 Metro NY Charity Reports

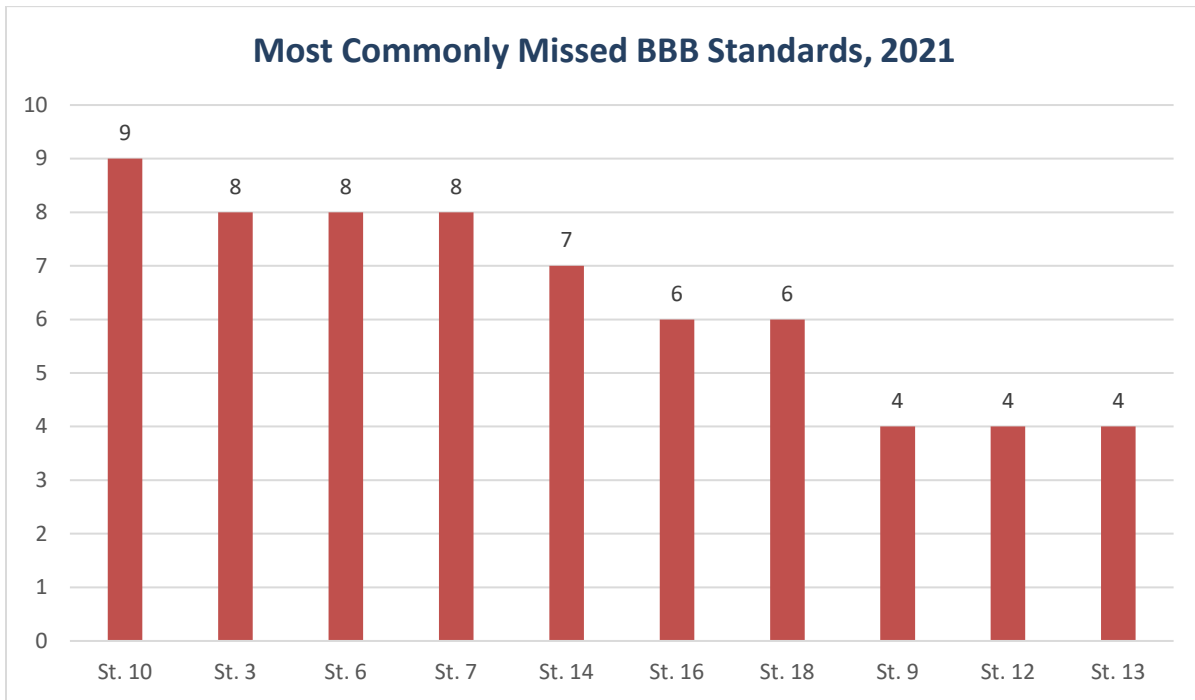
409 Complete Evaluations

AVERAGE % SPENT ON CHARITIES



Of the 409 nonprofits with complete BBB Charity Reports, 379 (89%) met all Standards; 30 (8%) failed one or more Standards; 10 (2%) were working towards accreditation, having submitted for the first time. Out of 764 total reports, 345 (45%) were Nondisclosure reports. Nondisclosure means the charity failed or declined to respond to BBB requests for information. Statistics cited are as of November 2021 annual measurement report.

BBB Standards Missed by Evaluated Charities, 2021



Missed BBB Standards, 2021

10. Ending Net Assets. Avoid accumulating funds that could be used for current program activities. To meet this standard, the charity's unrestricted net assets available for use should not be more than three times the size of the past year's expenses or three times the size of the current year's budget, whichever is higher. **(9)**

3. Board Meetings. Have a minimum of three evenly spaced meetings per year of the full governing body with a majority in attendance, with face-to-face participation. A conference call of the full board can substitute for one of the three meetings of the governing body. For all meetings, alternative modes of participation are acceptable for those with physical disabilities. **(8)**

6. Effectiveness Assessment Policy. Have a policy of assessing, no less than every two years, the organization's performance and effectiveness, and determining future actions required to achieve its mission. **(8)**

7. Effectiveness Reporting to Governance. Submit to the organization's governing body, for its approval, a written report that outlines the results of the aforementioned performance and effectiveness assessment and recommendations for future actions. **(8)**

14. Board-Approved Budget. Have a board-approved annual budget for its current fiscal year, outlining projected expenses for major program activities, fund raising, and administration. **(7)**

16. Annual Report. Have an annual report available to all, on request, that includes: (a) the organization's mission statement, (b) a summary of the past year's program service accomplishments, (c) a roster of the officers and members of the board of directors, (d) financial information that includes (i) total income in the past fiscal year, (ii) expenses in the same program, fund raising and administrative categories as in the financial statements, and (iii) ending net assets. **(6)**

18. Address Privacy Concerns of Donors by (1) providing in written appeals, at least annually, a means (e.g., such as a check off box) for both new and continuing donors to inform the charity if they do not want their name and address shared outside the organization, and (2) providing a clear, prominent and easily accessible privacy policy on any of its websites that tells visitors (i) what information, if any, is being collected about them by

the charity and how this information will be used, (ii) how to contact the charity to review personal information collected and request corrections, (iii) how to inform the charity (e.g., a check off box) that the visitor does not wish his/her personal information to be shared outside the organization, and (iv) what security measures the charity has in place to protect personal information. **(6)**

9. Fund Raising Expenses. Spend no more than 35% of related contributions on fund raising. Related contributions include donations, legacies, and other gifts received as a result of fund raising efforts. **(4)**

12. Detailed Expense Breakdown. Include in the financial statements a breakdown of expenses (e.g., salaries, travel, postage, etc.) that shows what portion of these expenses was allocated to program, fund raising, and administrative activities. **(4)**

13. Accurate Expense Reporting. Accurately report the charity's expenses, including any joint cost allocations, in its financial statements. **(4)**

Note: Some organizations missed more than one Standard. The total number of disclosing Metro NY charities missing any BBB Standard in an evaluation has declined in recent years. Please be aware that this has had an impact on the list of missed BBB Standards. For example, although a Standard may now be at or near the top of the most-missed list, it does not necessarily mean that the missed Standard is rising as an issue for most charities.

Over \$4.8 Billion

Total publicly-solicited *contributions* revenue received by charities reported on by Metro NY BBB Foundation, 2021

Analysis of BBB Charity Report Data

Regional Breakdown (includes all charities covered in 2021 Metro NY reports)

- **551 (72%)** of the charities are from the 5 boroughs of New York City
- **140 (18%)** of the charities are located on Long Island
- **67 (9%)** of the charities are located in the Mid-Hudson Region
- **6 (.07%)** of the charities are located in New Jersey and Connecticut

Governance Breakdown

- The average number of board members for organizations covered: **22**
- The average number of board meetings per year: **4.7**
- The average attendance of board members at board meetings: **72%**

Total Public Support (includes donations, corporate and government grants, in-kind services)

- The total amount of public support received: **\$4,837,402,652 (\$4.8 billion+)**
- The average of total public support received: **\$11,856,379**

Field/Focus Area

The charity categories that were included in 2020 Metro New York BBB Charity Reports are listed below from largest to smallest (excludes nondisclosure reports):

Category	Number (N=379)	Percent
Health & Human Services	142	38%
Children & Youth	64	17%
Community Development	57	15%
Arts & Culture	45	12%

Animals & the Environment	23	6%
Education & Literacy	19	5%
Law & Public Interest	13	3%
Police, Fire, & Vets	8	2%
Senior	8	2%

*excludes charities that did not disclose information

BBB Charity Reports

Metro New York Website Addresses: ny.give.org, newyork.bbb.org

International Websites: give.org, bbb.org

Donors and the general public can find *all* BBB Charity Reports by name and location through searches at either local or international BBB websites, or through searches in search engines such as Google. As of November 2021, the annual Metro NY measurement point, there were 764 Metro New York area BBB charity reports, and about 1,500 national BBB charities. About 12,000 national and regional BBB charity reports are available across the BBB system. BBB Foundation is currently focusing its proactive efforts to develop BBB Charity Reports on Metro New York charities that meet the following description:

- Publicly soliciting charities, at least three years in business, located in our reporting territory: New York City, Long Island, or the following counties of the Mid-Hudson Region - Westchester, Dutchess, Putnam, Rockland, Sullivan, Ulster, and Orange.
- Charities that are of significant public interest, or that seek BBB evaluation, indicated by factors such as (but not limited to) the following:
 - Charity requests a BBB Charity Report
 - BBB Foundation has received inquiries or complaints about the charity in question
 - Charity has received \$250,000 or more in *publicly solicited donations*
 - Charity is the subject of significant media or donor attention
 - Charity is serving important community needs, including DEI considerations
 - Indications that a charity's activities raise questions and merit investigation

Smaller charities with over \$50,000 in publicly solicited donations may voluntarily request a BBB Charity Report. Given sufficient information to do so, BBB may also report on smaller or newer charities if they appear to be of significant public interest.

BBB Accredited Charity Seal

As of December 2021, by year end, the Metro NY BBB Accredited Charity Seal program included **213 participating charities**. Only charities that have first met all BBB Standards upon evaluation are eligible to participate in the additional, voluntary BBB Seal program.



The BBB Accredited Charity Seal symbolizes accountability in charities. The BBB Seal provides a quick-check, easy-to-understand trustmark for the benefit of both charities and donors. It captures complex numbers, facts, policies, and practices in a widely recognized

and valued symbol, instantly showing that a charity has met all 20 of the BBB Standards for Charity Accountability. Organizations seeking to become a BBB Accredited Charity Seal Holder must first participate in a BBB Standards evaluation. **There is no cost for the BBB Charity Report evaluation.**

Charities are provided with the ability to log in to their individual, online platform to submit materials related to governance, measuring effectiveness, financial, and fundraising information. The resulting BBB Charity Report includes a determination about the charity's performance measured against the 20 BBB Standards for Charity Accountability, as well as a summary of the organization's mission, programs, governance and key financial information.

Charities that meet all 20 BBB Standards for Charity Accountability are automatically noted as BBB Accredited on BBB websites at no cost.

BBB Accredited Charity Seal participation is an optional program, exclusively available for charities that first meet all BBB Standards in a BBB evaluation. **Eligible BBB Accredited charities that choose to license the BBB Seal for fundraising and marketing purposes are asked to sign a formal agreement specifying how the trademarked BBB Seal may be used, and pay a sliding-scale licensing fee, based on the organization's fundraising revenue.** The Metro New York BBB Seal fee ranges from \$50 to \$1,100 annually for most organizations, up to \$5,500 at most. The maximum fee of \$5,500 is for very large organizations with public contributions of over \$60 million. Metro NY BBB Foundation works with charities on fee payment plans, when necessary, to make the Seal program accessible to all eligible nonprofits wishing to license and display the Seal. Metro New York BBB Accredited Charity Seal fees are published online at ny.give.org, for anyone to view.

Seal participants may display the Seal in transient advertising and solicitations such as newspaper ads, posters, direct mail appeals, in annual reports, and on letterhead stationery. Seal participants may also install the Seal anywhere on the local charity's primary website, on websites where the local charity advertises, and in emails or other digital fundraising uses, provided the Seal clicks to the online BBB Charity Report for verification of Accredited Seal Holder status.

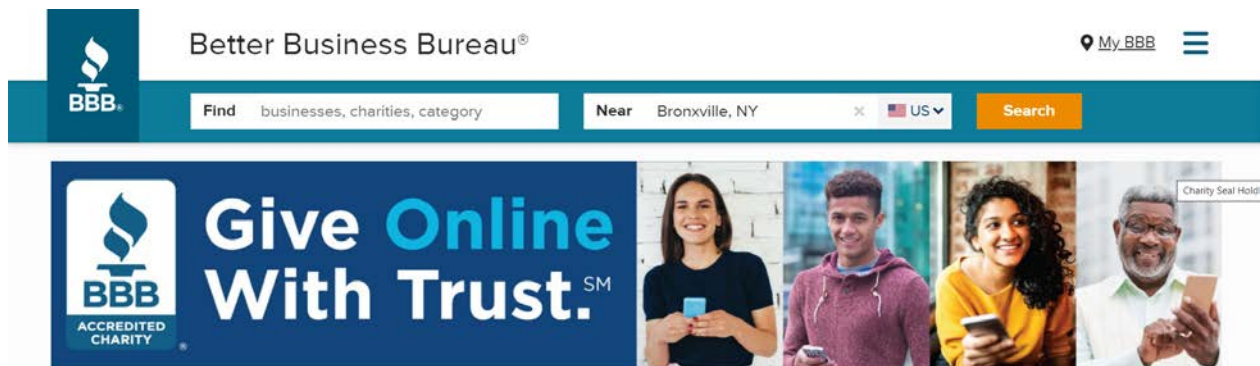
According to BBB's Give.org December 2021 Donor Trust Survey of more than 2,100 adults in the United States, **one out of three** participants (33%) said they were **"more likely to donate"** to a charity when the charity displays the **BBB Accredited Charity Seal** on a fundraising appeal.

As a benefit of Seal program participation, at no extra cost, BBB Charity Seal Holders in good standing at the time of publication are recognized in BBB-sponsored ads during the spring season as well as holiday giving time near the end of the year.



BBB Charity Seal Holder ad campaign in 2021: sample ad placed in New York Today newsletter of The New York Times, which clicked to a landing page with BBB Accredited Seal Holder names and website links to help donors find more information.

Seal Holders are recognized in the year-round NY BBB Accredited Charity Seal Holders landing page at ny.give.org:

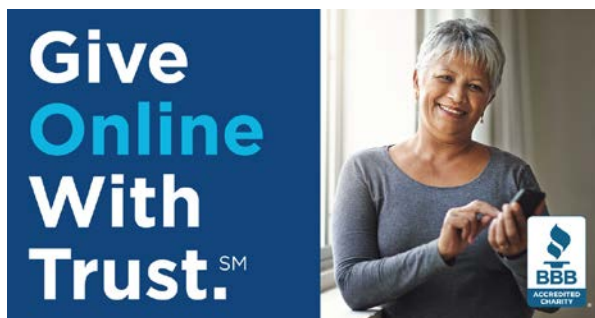
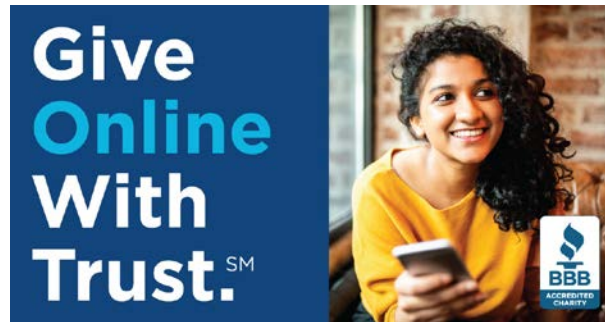


Now is a great time to support charities in the BBB Metro New York area that work to make your community a better place. Online donation through a charity's website is the fastest and most direct way to show your support.

When you donate, look for the BBB Accredited Charity Seal. It's the symbol that a charity meets BBB's rigorous accountability standards and has joined its Seal Program in Metro New York. When you support a BBB Accredited Charity, you can feel good about giving. Click on any name below to learn more about a charity and its work in Metro New York!

***Give Online With Trust*SM BBB Charity Information Social Media Ad Campaign in 2021**

In 2021, the BBB Foundation continued and enhanced its social media awareness campaign with a *Give Online With Trust*SM theme to emphasize the value of giving directly through the internet, as an effective way of speeding support to charities during the ongoing pandemic. The campaign included a series of ads featuring positive images of a variety of individuals, in a manner intended to express the joy of giving online to trustworthy charities. These ads, samples shown below, appeared in Facebook in a special paid campaign in springtime and again throughout the holiday giving season, linking to landing pages which listed BBB Accredited Charity Seal Holders. The holiday campaign also promoted all Metro New York BBB Accredited Charities.



Spring and holiday seasonal ads were placed in Facebook, and also inserted in a *New York Today/New York Times* email newsletter, reaching a target audience of high-income individuals with an interest in New York matters.



The New York Times
New York Today

November 29, 2021

Top of the *New York Today* newsletter for November 29, 2021. This newsletter featured several ads promoting BBB Accredited Charity Seal Holders for the kickoff of the holiday giving season.

Ads promoting the BBB Accredited Charity Seal and inviting potential donors to view lists of Metro New York Seal Holders and Accredited Charities on BBB.org were placed in Facebook and the *New York Today* Newsletter of *The New York Times* in Spring and Holiday 2021 times. Together, these campaigns produced the following results:

2,192,958 impressions

6,809 click-throughs to landing pages

As we have done for years, we promoted BBB Accredited Charities to about 7,000 BBB Accredited Businesses in quarterly newsletters as well as in special messages sent out at holiday times. BBB Foundation also offers custom charity checking services to Accredited Businesses.

Below is a sample header from the 2021 holiday email about BBB Charity Report services for BBB Accredited Businesses:



Are You Giving to Trustworthy Charities?

Holiday Giving Resources
for BBB® Accredited Businesses

During this holiday season, you and your employees may be considering end-of-year charitable contributions. Give With TrustSM with the help of BBB Charity Report Services from Metro New York's BBB Foundation.

An Exclusive Benefit for BBB Accredited Businesses

Consumer Education in English and Spanish

In 1999, the BBB Foundation created the Latino Business and Consumer Education Initiative. Through this long-term initiative, the Foundation seeks to promote consumer fraud prevention for Hispanics and raise awareness of key issues that affect Latino consumers, businesses and charities in New York.

Previous projects related to this initiative have included educational efforts involving television call-in projects and online content, such as *BBB Live: Scam Job Offers*, *BBB Live: Take Control of Your Debt*, *BBB Live: Student Loans – Study Your Options!*, *BBB Live: Apply the Brakes to Unfair Auto Loans*, *BBB Live: Managing Your Medical Debt*, *BBB Live: Identity Theft-Could It Happen to You?*, *BBB Live: Protecting Your Home*, and *Get More Money Now*.

The former BBB Live program has been redesigned as a web-based project which is in a pending state, due to a change in operations platform for the BBB.org website owned by the International Association of Better Business Bureaus (IABBB) where this program must be hosted online. We expect the program to be re-worked in 2022. We thank **TD Bank** and **MLB** for their generous support of the program redevelopment.

Education for Businesses

BBB Forum on Corporate Responsibility XIII July 28, 2021

BBB® Forum on
Corporate Responsibility XIV
BBB Online Edition

CSR Next
Exploring Business
Approaches to
Key Social
Issues

Register Now

Webcast, July 28, 2021, 1:00 pm - 2:30 pm EDT

BBB Foundation of Metro New York deeply appreciates the support of our generous sponsors for BBB Forum 2021: Major Sponsor **EY**; Leadership Sponsor **Nielsen**; and Benefactor Sponsor **MLB**. Due to the continuing pandemic, this program was presented as

a webcast, the agenda was shortened for webcast suitability, registration was made free, and the program was offered internationally to business leaders throughout North America.

As a result, we achieved **strong registration of 444 executives with 183 live attendees**. All registrants received a video of the webcast.

We also thank the additional 11 organizations that provided Event Support to generate awareness and attendance, including BBB Institute for Marketplace Trust, BBB National Programs, BSR, CSRHub, Governance & Accountability Institute, Inc., International Association of Better Business Bureaus, New York & New Jersey Minority Supplier Development Council, Partnership for New York City, Philanthropy New York, Sustainability Practice Network, World Business Council for Sustainable Development, and The Robert Zicklin Center for Corporate Integrity at Baruch College.

Our 2021 agenda featured a Keynote panel, led by **W. David Hubbard, Vice President and Deputy General Counsel of Verizon**. Additional Verizon discussants included **Katie Davis**, Manager, Social Innovation, Corporate Social Responsibility; **Lisa Meng**, Manager, Corporate Social Responsibility, Societal Impact; and **Phil Puthumana**, Manager, Corporate Social Responsibility. The Verizon group shared insights about how their corporation is approaching key social issues, from a variety of perspectives.

Additional distinguished speakers included: **Charlene Polite Corley, Vice President, Diverse Insights & Partnerships, Nielsen**, who discussed research results about the importance of diversity and representation in media; and **Annelise Thim, Manager, Women's Empowerment of BSR**, who provided information about business approaches to DEI and social justice across supply chains. She was joined by **Therese Harrison, Director, Environmental Social Governance Services-Procurement of EY** and **Smruti Govan, Director, Corporate Responsibility, PVH Corp.**, who provided additional perspectives about how businesses are dealing with social justice matters connected with their supply chains.

Skill-Building Volunteer Intern Program

How the Program Works

Our BBB Foundation is proud to maintain an ongoing, extensive internship program. We provide charity accountability program interns with nonprofit accounting insights and an overview of the nonprofit sector in New York, as well as invaluable details about the management and governance of charities. Many other interns under our Foundation's program acquire valuable career skills by assisting with BBB dispute resolution and customer service activities.

Volunteer Intern Program Activities in 2021

In 2021 our Volunteer Intern Program activities continued to be strong:

- There were 36 interns in all for the 2021 year
- Volunteer interns contributed 8,381 hours of training and service
- Cases/reports completed with intern assistance totaled 35,924

Development of Volunteer Intern Program Over 3 Years

Our Skill-Building Volunteer Intern Program has become a year-round effort, although summer remains a peak period for program activities. BBB Foundation has enhanced its focus on providing even richer and more varied educational experiences to interns through the Volunteer Intern Program.

Since the onset of the pandemic, the intern program has successfully been conducted in an online environment. This has made it possible to reach an even more diverse pool of intern candidates.

Intern Hours for 2021		Number of 2021 Interns		Cases/Reports Assisted by Interns in 2021	
1,025	Charity Accountability	7	Charity Accountability	113	Charity Accountability
7,356	NYC (Dispute Resolution)	29	NYC (Dispute Resolution)	35,811	NYC (Dispute Resolution)
0	Mid-Hudson	0	Mid-Hudson	0	Mid-Hudson
8,381	Total	36	Total	35,924	Total

Intern Hours for 2020		Number of 2020 Interns		Cases/Reports Assisted by Interns in 2020	
1,228	Charity Accountability	8	Charity Accountability	140	Charity Accountability
5,600	NYC (Dispute Resolution)	29	NYC (Dispute Resolution)	30,765	NYC (Dispute Resolution)
0	Mid-Hudson	0	Mid-Hudson	0	Mid-Hudson
6,828	Total	37	Total	30,905	Total

Intern Hours for 2019		Number of 2019 Interns		Cases/Reports Assisted by Interns in 2019	
1,494	Charity Accountability	12	Charity Accountability	161	Charity Accountability
4,985	NYC (Dispute Resolution)	29	NYC (Dispute Resolution)	22,560	NYC (Dispute Resolution)
104	Mid-Hudson	3	Mid-Hudson	1,040	Mid-Hudson
6,583	Total	44	Total	23,761	Total

Interns are actively recruited from a wide variety of schools. For example, college attended by recent interns have attended:

- New York University
- John Jay College
- University of California, Berkeley
- Brooklyn College
- George Washington University School of Law
- Fordham University
- Columbia University
- John Hopkins University
- Rollins College
- University of Albany
- Adelphi University
- Seton Hill University

BBB staff members visit career fairs at colleges (in-person when feasible, and online when pandemic conditions prevent live events), and post intern opportunities online to attract candidates, who are then selectively screened.

Intern Career-Building Opportunities

To enhance the intern experience, BBB Foundation's Volunteer Intern Program previously included a series of casual, in-person breakfast and luncheon programs. During the COVID-19 pandemic, we transitioned these into completely virtual career-building programs. During these career-oriented virtual meetings, interns get the rare chance to meet and speak with distinguished business and community leaders who are BBB and BBB Foundation board members.

Senior executives discuss their career paths and provide interns with an insider's view of the New York business and charity community. In addition, 2021 NYCAP interns were able to show their skills through projects and presentations, such as mock charity Standards briefings.



2021 interns attending the career session presented by David Hubbard, Vice President and Deputy General Counsel, Verizon Communications, and BBB Board member, via Microsoft Teams videoconference.



2021 interns attending a career session with Candice Meth, Partner, EisnerAmper, and Trustee, BBB Foundation Board.

Intern Feedback

Interns are invited to provide feedback about their BBB experience through exit surveys. Their comments are used to enhance the Volunteer Program. When asked whether or not the internship met their expectations, at the BBB, a Fall 2021 Charity Accountability (NYCAP) Program intern commented, "It did. I was happy to be working on my own reports and communicating directly with charities, rather than just doing other people's busy work."

When asked about the most interesting aspect of their internship at the BBB, one Summer 2021 Dispute Resolution (DR) intern answered: "Being able to use the phones to

talk to consumers and businesses was game changing. Not only did it ease the process by being able to have a real conversation, it really humanized what we do at BBB.”

When asked if the skills learned through the internship would be used in a future career, a Summer 2021 NY Charity Accountability (NYCAP) intern replied, “I feel I learned how to organize myself as well as to communicate with external stakeholders. Having to be in communication with several charities at once, forced me to get organized.”

We are grateful to **BNY Mellon** and **Jane and Rabbi Abraham Krantz Family Foundation** for their generous grants in support of the BBB Foundation’s Skill-Building Volunteer Intern Program in 2021.

Diversity, Equity, and Inclusion Initiative

For years, the BBB Foundation has made significant efforts to be mindful of diversity, equity, and inclusion considerations when planning programs, inviting speakers and participants, reaching out to interns, and marketing itself to nonprofit leaders.

In 2020, the BBB Foundation board established a DEI committee, which is now collaborating with a DEI committee from the affiliated Better Business Bureau Serving Metropolitan New York. As an initial step, this committee, and the BBB Foundation’s board, approved an investment in a DEI survey of both boards and all BBB Metro New York staff. The survey was fielded in 2021. The results were reported to both BBB and BBB Foundation boards, as well as their joint DEI Committees, and are now being used to plan further steps.

At its December 7, 2021 meeting, the BBB Foundation board adopted expanded language related to the Foundation’s Mission statement, to better align it with the newly updated Better Business Bureau Mission, which now incorporates language directly addressing diversity, equity, and inclusion issues with respect to the charity elements of its programs.

The enhanced statement is as follows:

Mission

Support the Better Business Bureau by defining and promoting ethical business and charity standards in New York.

Charities

The Better Business Bureau Foundation of Metropolitan New York sees trust as a function of two primary factors – integrity and performance. Integrity includes respect, ethics, intent, and working towards a **diverse, inclusive, and equitable nonprofit marketplace**. Performance speaks to a charity’s track record of operating with integrity and delivering results in accordance with the BBB Standards for Charity Accountability.



Populations Served by Metro New York's BBB Foundation

The Education and Research Foundation of the Better Business Bureau® of Metropolitan New York provides information, education, and assistance to consumers, nonprofits, businesses, journalists, professionals (such as consultants, accountants, and attorneys), government officials and others who are interested in the following:

- Business and charity standards and practices
- Corporate responsibility trends, issues, and challenges
- Consumer and business fraud prevention and education
- BBB Charity Reports, comparing charity performance to the BBB Charity Accountability Standards
- Charity accountability and governance
- Informed giving practices for donors
- Charity capacity-building for effectiveness and impact
- Collaborative nonprofit efforts

The primary geographic focus is on residents of New York State and the Metro New York area. However, during pandemic conditions in 2021, BBB Foundation educational programs - such as its 2021 Forum on Corporate Responsibility and webcasts in its 2021 Charity Effectiveness program series – were offered online nationally and internationally, most of them at no cost, in collaboration with BBB organizations across North America, as well as other nonprofit organizations. The Foundation's Charity Accountability Program is a national model for comparable programs in the international BBB association.

Under its Latino Initiative, the BBB Foundation has made efforts to develop resources that would enable it to provide culturally appropriate, needed consumer and business information to the public in both Spanish and English. This is an ongoing project. New content is planned for future development under the BBB Living project name.

In 2021, BBB Foundation executives worked extensively with a wide variety of nonprofit-related organizations and task forces, including government agencies, associations, capacity-builders, funders, and others. These relationships are ongoing.

Metro New York Better Business Bureau BBB Foundation Affiliate and Collaborator

BBB Accredited Businesses

BBB helps people find businesses and charities they can trust. BBB Accredited Businesses and Charities make a commitment to conduct their operations with accountability and integrity, in accordance with Better Business Bureau Standards and guidelines. Consumers understand the vital nature of this commitment and value it.

Every year, millions of consumers and businesses *Start With Trust*® by turning to the BBB for business and charity accountability information, as well as the latest news about scams. **During the pandemic consumers have flocked to BBB as their trusted source of business and charity information.** In 2021, consumers turned to BBB Metro New York over 8.2 million times to view BBB Business Profiles and Charity Reports. In the 2021 year, consumers sought services from BBBs across North America more than 200 million times.

In addition to upholding BBB standards of integrity in their practices, thousands of BBB Accredited Businesses make voluntary donations beyond their accreditation fees, in support of the BBB Foundation of Metro New York and its activities.

Business Integrity and Consumer Trust

Trust in business is essential for a strong economy. Customer confidence is a vital element of business strength. BBB encourages business practices that will merit consumer trust.

Annually, BBBs in the U.S., Canada, and Mexico provide hundreds of millions of instances of service to people who need BBB's assistance. The Better Business Bureau system has been helping people make smarter buying decisions for over 100 years.

On June 6, 1922, the Metropolitan New York Better Business Bureau was founded to combat investment fraud, as well as deceptive advertising. Today, by promoting guidelines for reputable conduct in advertising, in business transactions and in the online marketplace, BBB helps companies become successful and grow. By reporting on customer experiences with businesses, BBB encourages public recognition of companies that demonstrate integrity and reliability in their operations and helps consumers avoid frauds.

Solving Problems Without Litigation

BBB helps to solve problems between businesses and customers without litigation. It gives consumers and businesses pre-purchase information that often saves them a significant amount of money and trouble.

Consumers visit the website, call, write, and email to ask about business and charity reliability; request educational information; file complaints, reviews, and scam reports; and seek dispute resolution and fraud prevention help.

Metropolitan New York's BBB collaborates with its separately incorporated and governed BBB Foundation to create public education programs and other efforts that are relevant to our community's ever-changing needs.

Metro New York BBB Foundation Board of Directors and Officers 2021

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David Okorn
Executive Director
Long Island Community Foundation

Vice Chairs

Richard Brown
Vice President, Philanthropy
American Express

Pamela Haas
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PMH Consulting

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Partner, National Leader,
Not-for-Profit Services Practice
EisnerAmper

Metro New York BBB Foundation Statement of Activities 2021

	Year Ended December 31, 2021		
	Without Donor Restrictions	With Donor Restrictions	Total Net Assets
Support and other revenues:			
Contributions	\$ 136,438	\$ 108,999	\$ 245,437
Interest income	613		613
Seal Program income	197,613		197,613
Seal Review income	15,000		15,000
Income from related party	11,472		11,472
Donated services*	90,649		90,649
Net assets released from restrictions**	85,297	(85,297)	-
Total support and other revenues	531,082	23,702	554,787
Expenses:			
Program services:			
Charity Accountability Program (NYCAP)	198,928		198,928
Educational initiatives	177,782		177,782
Total program services	376,710		376,710
Supporting services:			
Management and general	85,819		85,819
Fund-raising	12,965		12,965
Total supporting services	98,784		98,784
Total expenses	475,494		475,494
Change in net assets	55,588	23,702	79,290
Net assets – January 1	997,071	51,136	1,048,207
Net assets – December 31	\$ 1,052,659	\$ 74,838	\$ 1,127,497

* Donated services were for *pro bono* media to distribute educational public service announcements (PSAs).

** Previously accumulated net assets were released from restrictions due to final satisfaction of requirements.

The latest annual financial report with program activities description for which contributions are solicited for the Education and Research Foundation of the Better Business Bureau of Metropolitan New York, Inc. is available upon request from the organization at 30 East 33rd Street, 12th Floor, New York, NY 10016, 212-533-6200. Charity information and our latest annual financial report are also available from the Charities Bureau/Office of the N.Y.S. Attorney General at www.charitiesnys.com, 212-416-8686/8401.