

Annual Report 2022

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



GIVE

WITH

TRUSTSM

**30 East 33rd St.
12th Floor
New York, NY 10016
212.533.7500
ny.give.org**



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.

Vision

The BBB Foundation is the premier source in New York for the definition of ethical practices for both nonprofit and for-profit businesses. The BBB Foundation is the first source of information for New Yorkers about charity accountability practices of New York charities.

Mission

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

Charities Statement: BBB Foundation of Metro 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.

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, 2022

- **1,448** educational event and webinar participants
- **762** Metro NY BBB Charity Reports as of the December 2022 measurement point
- **38** volunteer interns with **7,001** hours of training, supervision and service, assisting with **33,420** dispute resolution cases and **68** BBB Charity Reports
- Tracked **over 6.6 million visits** to BBB Metro NY Business Profiles and Charity Reports (combined), with **4.9 million 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 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 2022 by **2,937 general operating donations provided by BBB Accredited Businesses totaling \$125,439**, voluntarily given beyond their accreditation fees. We thank our generous BBB Accredited Business leaders for these thousands of welcome donations. Licensing fees earned through the BBB Accredited Charity Seal program, along with generous program sponsorships acknowledged throughout this report, also contribute significant income to the Foundation.

We thank **The New York Community Trust** for its generous support of the Charity Effectiveness Symposium and Program Series.

Metro New York's BBB Charity Accountability Program (NYCAP), formerly known as the New York Philanthropic Advisory Service (NYPAS), was launched in 1987. 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. NYCAP also develops Charity Reports for Connecticut and New Jersey BBBs upon request, and collaborates with the BBB of Upstate New York on charity outreach efforts.

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 give.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 evaluates charities against the 20 Standards for Charity Accountability, and publishes reports based on its findings. This web page provides information on how to start the report process.

BBB Metro NY: Build trust with donors

A BBB Charity Report provides independent confirmation of a charity's trustworthy key practices by a respected accrediting organization. Becoming a BBB Accredited Charity is a great way to show potential donors that your nonprofit meets high performance standards.

Find out how your charity can stand out in a tough nonprofit environment by meeting the [20 BBB Standards for Charity Accountability](#).

Thank You for Participating!

Your organization's commitment to demonstrating integrity in nonprofit practices is important and greatly appreciated.

Begin your process by checking out BBB Standards learning resources under the "Get Informed" tab. When you are ready to start your BBB Charity Report, please get in touch through the "Get Started" options below. You are also welcome to contact us at charity@newyork.bbb.org or 212-358-2873 for prompt help.



Get Informed



Get Started

International Association of
Better Business Bureaus

CONTACT US

We will be delighted to help by answering your questions. Connect with us at charity@newyork.bbb.org or 212-358-2873

BBB Educational Programs for Nonprofits

Throughout the year, BBB Foundation offers educational conferences and workshops, delivered via online platforms. 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 workshops (in person 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 2022, we deeply appreciated receiving the generous support of **The New York Community Trust** for support of the Charity Effectiveness program series. We were also grateful for special program support in 2022 from **Kiwi Partners, EisnerAmper, Grassi Advisors & Accountants**, and **BDO FMA** (now known as BDO).

Given the difficulties faced by charities and noting evidence that program attendance decreased when webinars were offered for a small cost, admission fees were dropped after March 2021. All programs in 2022 continued to be presented as free webcasts. 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. We thank our sponsors whose generosity made this possible.

Charity Effectiveness Series Webinars in 2022

January 26, 2022

The graphic features a dark blue background with a white flame logo and the text 'January 26, 2022' and 'BBB Webcast, 1:00 - 2:30 pm ET'. The main title 'Building a Diverse, Equitable, and Inclusive Workplace' is in yellow and white, with 'Free Online Event' below it. Two circular headshots of speakers are shown: Frankie Tin and Solana Cederboim Wax. A 'Register Now' button is at the bottom left.

January 26, 2022
BBB Webcast, 1:00 - 2:30 pm ET

**Building a Diverse,
Equitable,
and Inclusive
Workplace**
Free Online Event

Register Now

Frankie Tin
HR Business Partner Consultant
Kiwi Partners

Solana Cederboim Wax
MSHR, SPHR
VP of HR Services
Kiwi Partners

The January 25, 2022 program, ***Building a Diverse, Equitable, and Inclusive Workplace***, was generously sponsored and presented by Kiwi Partners. The speakers included: Solana Cederboim Wax, MSHR, SPHR, Vice President of HR Services, Kiwi Partners; and Frankie Tin, HR Business Partner Consultant, Kiwi Partners.

Event Supporters for this program included Adelphi University/Center for Nonprofit Leadership, Association for Nonprofit Specialists, BBB Wise Giving Alliance, Candid, Human Services Council, Nonprofit New York, Staten Island Not for Profit Association, and Better Business Bureau organizations across North America.

This event drew 370 registrants and 211 attendees, not counting speakers or BBB staff who managed the program.

February 22, 2022

The graphic has a light blue and white background with a sunburst effect. It features the BBB 100 Years logo and the text 'BBB Charity Effectiveness Symposium XVI' and 'FREE Online Edition'. The main title 'Beyond Recovery' is in large blue font, followed by 'Transforming to Drive Change' in white. The date and time 'February 22, 2022, 12:30 - 2:30PM EST' are at the bottom.

BBB 100 YEARS **BBB® Charity Effectiveness Symposium XVI**
FREE Online Edition

Beyond Recovery
**Transforming to
Drive Change**

February 22, 2022, 12:30 - 2:30PM EST

On February 22, 2022, we offered the sixteenth BBB Charity Effectiveness Symposium to a national audience via webinar, in collaboration with other Better Business Bureau organizations.

Entitled ***Beyond Recovery: Transforming to Drive Change***, this program featured Keynote remarks by Richard Buery, Chief Executive Officer of Robin Hood Foundation. This was followed a panel discussion led by Chris Cardona, then Senior Program Officer of Ford Foundation. Panelists included Lisa Pilar Cowan, Vice President of Robert Sterling Clark Foundation; Damyn Kelly, JD, PhD, President and CEO of Lutheran Social Services of New York; and Daniel McPhee, Executive Director, Urban Design Forum.

Nancy Aries, Interim Dean of the Marxe School of Public and International Affairs at Baruch College, participated in the welcome to attendees. James G. Sheehan, Esq., Chief, Charities Bureau, Office of the New York State Attorney General, delivered a regulatory update in his Closing Remarks.

Event Supporters for this program included Adelphi University/Center for Nonprofit Leadership, Association for Nonprofit Specialists, Association of Development Officers, BBB Wise Giving Alliance, Candid, Center for Bronx Nonprofits, Center for Nonprofit Strategy and Management, Human Services Council, New York Council of Nonprofits, Nonprofit New York, NYC Department of Youth and Community Development, Philanthropy New York, Staten Island Not for Profit Association, Support Center, and Better Business Bureau organizations across North America.

This event drew 348 registrants and 155 attendees, not counting speakers or BBB staff who managed the program.

March 29, 2022

100 March 29, 2022
BBB YEARS. Webcast, 1:00 - 2:30 pm ET

**Ensuring Sustainability
and Telling Your
Nonprofit's Story**
Free Online Event

Register Now

Candice Meth, CPA
Partner, National Leader,
Not-for-Profit Services
EisnerAmper

Timothy Schroeder, CPA
Senior Manager
Not-for-Profit Services
EisnerAmper

Our March 29, 2022 webinar, ***Ensuring Sustainability and Telling Your Nonprofit's Story***, 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.



Event Supporters for this program included Adelphi University/Center for Nonprofit Leadership, BBB Wise Giving Alliance, Human Services Council, Staten Island Not for Profit Association, and Better Business Bureau organizations across North America.

This event drew 161 registrants and 87 attendees, not counting speakers or BBB staff who managed the program.

April 26, 2022

100 April 26, 2022
BBB YEARS. Webcast, 1:00 - 2:30 pm ET

Scenario Planning to Manage Uncertainty
Free Online Event



Register Now

Candice Meth, CPA
Partner, National Leader,
Not-for-Profit Services
EisnerAmper

Timothy Schroeder, CPA
Senior Manager
Not-for-Profit Services
EisnerAmper

Presented on April 26, 2022, our free webinar entitled **Scenario Planning to Manage Uncertainty** 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.

Event Supporters for this program included Adelphi University/Center for Nonprofit Leadership, BBB Wise Giving Alliance, Human Services Council, Nonprofit New York, Staten Island Not for Profit Association, Support Center, and Better Business Bureau organizations across North America.

This event drew 143 registrants and 72 attendees, not counting speakers or BBB staff who managed the program.

May 24, 2022

100 May 24, 2022
BBB YEARS. Webcast, 1:00 - 2:30 pm ET

Diagnosing Your Nonprofit's Financial Health
Free Online Event

Register Now



David M. Rottkamp, CPA
Partner
Not-for-Profit Practice Leader
Grassi Advisors & Accountants

Vanessa M. Gordon, CPA
Audit Senior Manager
Not-for-Profit Practice
Grassi Advisors & Accountants

We were pleased to offer the free webcast ***Diagnosing Your Nonprofit's Financial Health*** with generous sponsorship and a presentation from Grassi Advisors & Accountants. The event took place on May 24, 2022. Program speakers included David M. Rottkamp, CPA, Partner, Not-for-Profit Practice Leader; and Vanessa M. Gordon, CPA, Audit Senior Manager, Not-for-Profit Practice, of Grassi Advisors & Accountants.

Event Supporters for this program included Adelphi University/Center for Nonprofit Leadership, Association of Nonprofit Specialists, BBB Wise Giving Alliance, Center for Nonprofit Strategy and Management, Human Services Council, New York Council of Nonprofits, Staten Island Not for Profit Association, and Better Business Bureau organizations across North America.

This event drew 183 registrants and 95 attendees, not counting speakers or BBB staff who managed the program.

October 25, 2022

October 25, 2022
Webcast, 1:00 - 2:30 pm ET
Recalibrate Your Business Model:
Planning for Financial Resilience in a Shifting World
REGISTER NOW!

Our final free webcast on October 25, 2022 was entitled ***Recalibrate Your Business Model: Planning for Financial Resilience in a Shifting World*** with generous sponsorship and a presentation from BDO FMA (now known as BDO). The program speaker was Hilda Polanco, CPA, then Managing Partner of BDO FMA.

Event Supporters for this program were Adelphi University/Center for Nonprofit Leadership, Association of Nonprofit Specialists, BBB Wise Giving Alliance, Center for Nonprofit Strategy and Management, Human Services Council, Nonprofit New York, and Better Business Bureau organizations across North America.

This event drew 154 registrants and 77 attendees, not counting speakers or BBB staff who managed the program.

In-Person Nonprofit Event Participation, 2022

March 25, 2022: Brian Rauer, Executive Director, Mid-Hudson and General Counsel, participated in the Mid-Hudson Nonprofit Summit as an attendee.

June 17, 2022: Ezra Coopersmith, Manager, Marketing and Communications, staffed a BBB Foundation exhibit table at the re-launched Fundraising Day in New York conference, Manhattan (COVID protocols – masked).

October 6 and 7, 2022: Bret Dewhurst, Community Programs Coordinator from Upstate NY BBB, participated as an attendee. Art Taylor, CEO of BBB Wise Giving Alliance was a speaker.

BBB Charity Standards Workshops in 2022

In 2022, 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. During the COVID-19 pandemic, starting in 2020, we shifted from in-person programs to webcasts for these workshops and continued to do so in 2022.

When invited to do so, BBB Foundation will also present programs at no-cost for audiences recruited by other organizations. There were 5 Standards programs in 2022, with 115 attendees in all.

At each session, BBB Foundation and/or BBB Wise Giving Alliance 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

September 22, 2022

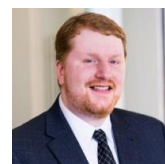
Start With Trust



Today's Speakers



Luana Lewis
Senior Vice President,
Programs and Services
Education and Research Foundation of
the
BBB of Metropolitan NY +
BBB Serving Metro NY



Shawn Van Gorder
Director of Charity Evaluation
BBB Wise Giving Alliance

Start With Trust

2022 BBB Charity Standards Workshops: 115 attendees in all

February 9, 2022	Webinar (46 registrants, 29 attendees)
April 7, 2022	Webinar (44 registrants, 24 attendees)
June 22, 2022	Webinar (53 registrants, 20 attendees)
September 22, 2022	Webinar (64 registrants, 33 attendees)
November 1, 2022	Webinar (29 registrants, 9 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 July 2023 Webinar

In this updated webinar, we explain each of the BBB Standards for Charity Accountability and discuss how meeting these Standards can benefit your nonprofit.

Presenters:

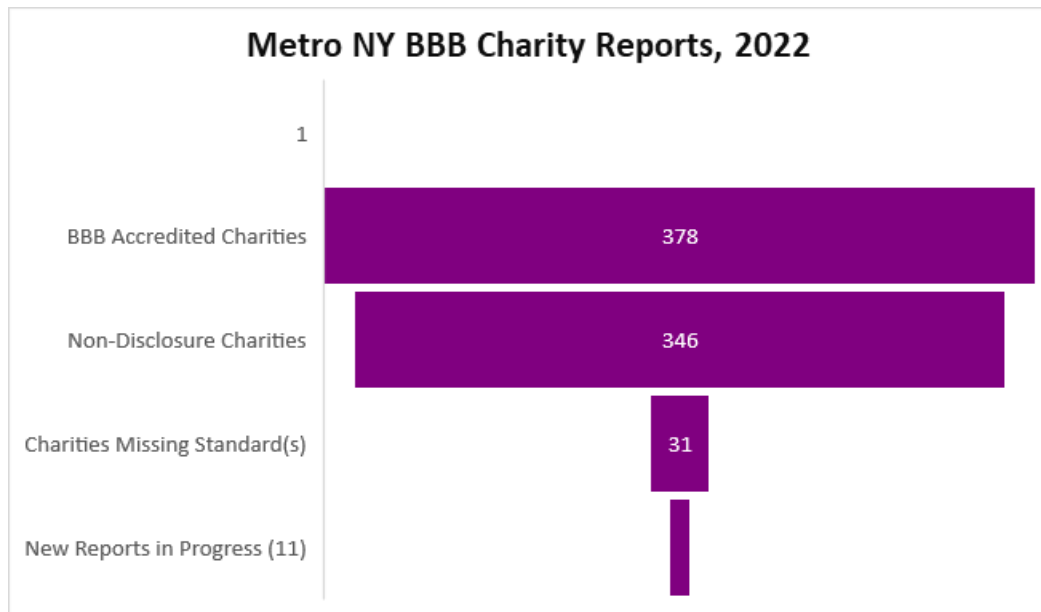
- Luana Lewis, Senior Vice President, Programs and Services, BBB Serving Metropolitan New York
- Shawn Van Gorder, Director of Charity Evaluation, BBB Wise Giving Alliance

[View Now](#)

Overview of Charity Accountability Program, 2022

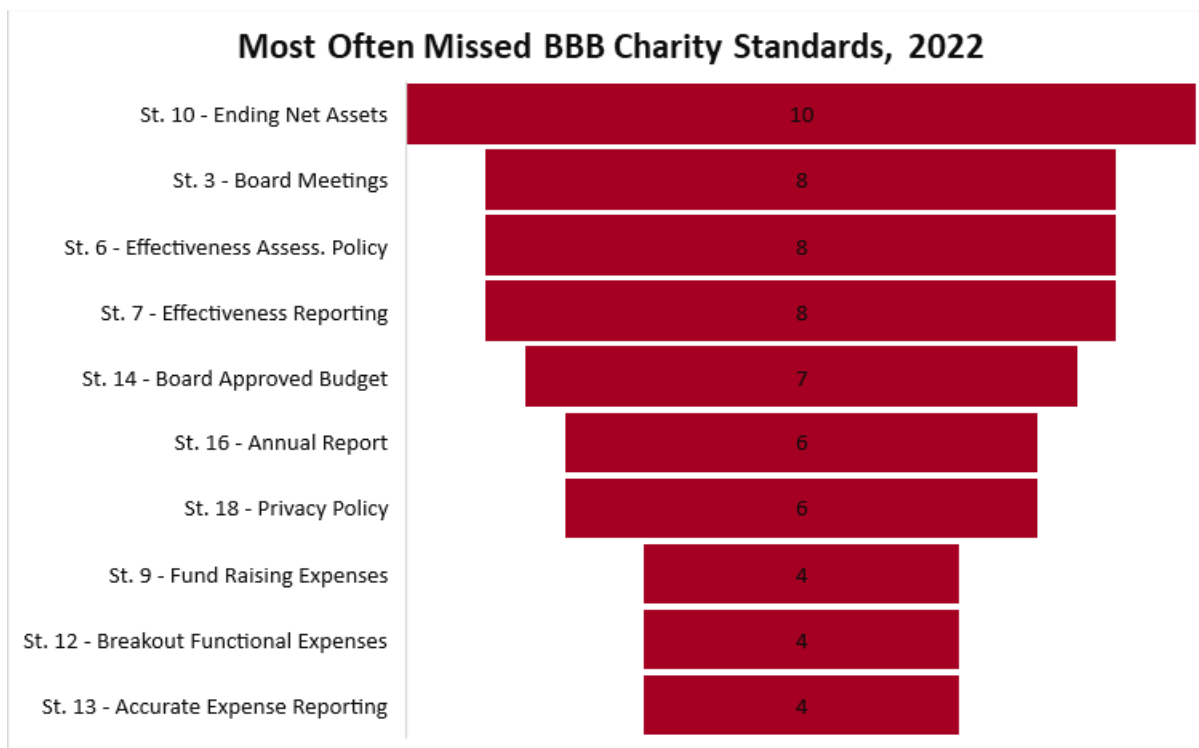
766 Metro NY Charity Reports

409 Complete Evaluations



Of the 409 nonprofits with complete BBB Charity Reports, 378 (92%) met all Standards; 31 (8%) failed one or more Standards; 11 (2%) were working towards accreditation, having submitted for the first time. Out of 766 total reports, 346 (45%) were Nondisclosure reports. Nondisclosure means the charity failed or declined to respond to BBB requests for information. Statistics cited are as of November 2022 annual measurement report.

BBB Standards Missed by Evaluated Charities, 2022



Missed BBB Standards, 2022

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. **(10)**

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, 2022

Analysis of BBB Charity Report Data

Regional Breakdown (includes all charities covered in 2022 Metro NY reports)

- **552 (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
- **7 (.9%)** of the charities are located in New Jersey and Connecticut

Governance Breakdown

- The average number of board members for organizations covered: **21**
- The average number of board meetings per year: **4.8**
- 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: **\$4,826,255,159 (\$4.8 billion+)**
- The average of total public support received: **\$12,870,013 (\$12.8 million)**

Field/Focus Area

The charity categories that were included in 2022 Metro New York evaluated BBB Charity Reports are listed below from largest to smallest (excludes nondisclosure reports):

Category	Number* (N=378)	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	7	2%

**excludes charities that did not disclose information*

BBB Charity Reports

**Metro New York Website Address: ny.give.org
International Website: give.org**

Donors and the general public can find *all* BBB Charity Reports by name and location through searches at ny.give.org and give.org, or through searches in search engines such as Google. As of November 2022, the annual Metro NY measurement point, there were 766 Metro New York area BBB Charity Reports, and about 1,500 national BBB Charity Reports. 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 regional charities, at least three years in business, located in our reporting territory: New York City, Long Island, or these 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 DEIA 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 2022, by year end, the Metro NY BBB Accredited Charity Seal program included **211 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 2022: 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:



***Give Online With Trust*SM BBB Charity Information Social Media Ad Campaign in 2022**

In 2022, 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 online, as an effective way of speeding support to charities during pandemic and recovery times. 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.

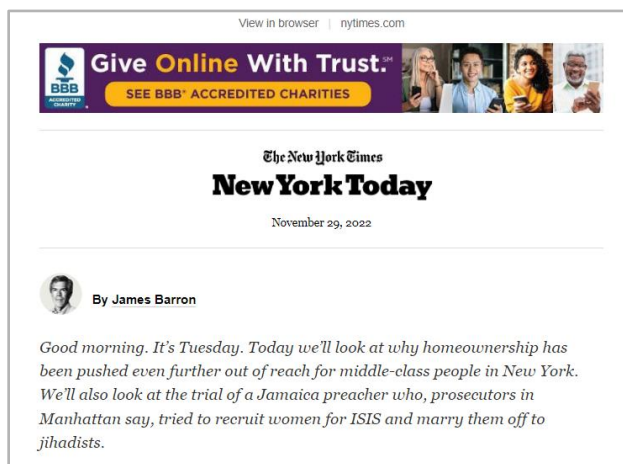
Ads promoting the BBB Accredited Charity Seal and inviting potential donors to view lists of Metro New York Seal Holders and Accredited Charities on BBB.org were placed in Facebook and the *New York Today* Newsletter of *The New York Times* in Spring and Holiday 2022 times. Together, these campaigns produced the following results:

3,411,767 impressions

6,636 click-throughs to landing pages



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.



Top of the New York Today newsletter for November 29, 2022, Giving Tuesday. This newsletter featured several ads promoting BBB Accredited Charity Seal Holders for the kickoff of the holiday giving season.

Promoting Accredited Charities to Businesses in 2022

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 2022 holiday email about BBB Charity Report services for BBB Accredited Businesses:



BBB

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.

Education for Businesses

BBB Foundation of Metro New York deeply appreciates the support of our generous sponsors for our **2022 BBB Forum on Corporate Responsibility: Major Sponsors BNY Mellon, EY, and 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 the **registration of 361 executives out of 1,453 clicks to the signup page, with 135 live attendees**. All registrants received a video of the webcast.

We thank the additional 12+ organizations that provided Event Support to generate awareness and attendance, including BBB Institute for Marketplace Trust, BBB National Programs, BBB Wise Giving Alliance, BSR, Center for Nonprofit Leadership at Adelphi University, CSRHub, Governance & Accountability Institute, Inc., International Association of Better Business Bureaus, Partnership for New York City, Philanthropy New York,

Sustainability Practice Network, and The Robert Zicklin Center for Corporate Integrity at Baruch College, as well as Better Business Bureau organizations across North America.



BBB® Forum on
Corporate Responsibility XV
Online Edition

Risk and Responsibility

Business Integrity in an
Age of Disruption

Register Now

Free Webcast, September 14, 2022, 12:30 - 2:30 pm ET

Our 2022 Forum on Corporate Responsibility was entitled *Risk and Responsibility: Business Integrity in an Age of Disruption*. It took place online, on September 14, 2022.

The Keynote remarks were entitled "The Power of the Employee." It was followed by a panel discussion about regulatory issues and other factors affecting business responsibility efforts (ESG, ex, environmental-social-governance activities). The program concluded with an interview of a corporate sustainability leader about recent developments.

The agenda featured these very distinguished leadership speakers:

- **Laurie Lovett**, Global Chief People Officer, Nielsen – *Keynote Speaker*
- **Eric Solomon**, Senior Vice President, Marketplace Enablement, Nielsen – *BBB Chairman, Welcome Remarks, Keynote Interviewer*
- **Ann Tracy**, Chief Sustainability Officer, Colgate-Palmolive Company – *Featured Speaker*
- **Jorgette Mariñez**, Director and Americas Lead, Consumer Sectors, BSR – *Featured Speaker Interviewer*
- **Bryan McGannon**, Director of Policy and Programs, US SIF: The Forum for Sustainable and Responsible Investment – *ESG Update Panel Moderator*
- **Audrey Metzger Bailey**, Senior Manager, Climate Change and Sustainability Services, EY - *Panelist*
- **Eric Kane**, Director of ESG Research for the Americas, Bloomberg Intelligence - *Panelist*
- **Brian Matt**, CFA, Director - Head of ESG Advisory, New York Stock Exchange - *Panelist*

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 2022

In 2022 our Volunteer Intern Program activities continued to be strong:

- There were 38 interns in all for the 2022 year
- Volunteer interns contributed 7,001 hours of training and service
- Cases/reports completed with intern assistance totaled 33,488

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 COVID 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. This continued throughout 2022.

Intern Hours for 2022		Number of 2022 Interns		Cases/Reports Assisted by Interns in 2022	
1,102	Charity Accountability	8	Charity Accountability	68	Charity Accountability
5,899	NYC (Dispute Resolution)	30	NYC (Dispute Resolution)	33,420	NYC (Dispute Resolution)
7,001	Total	38	Total	33,488	Total

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)
8,381	Total	36	Total	35,924	Total

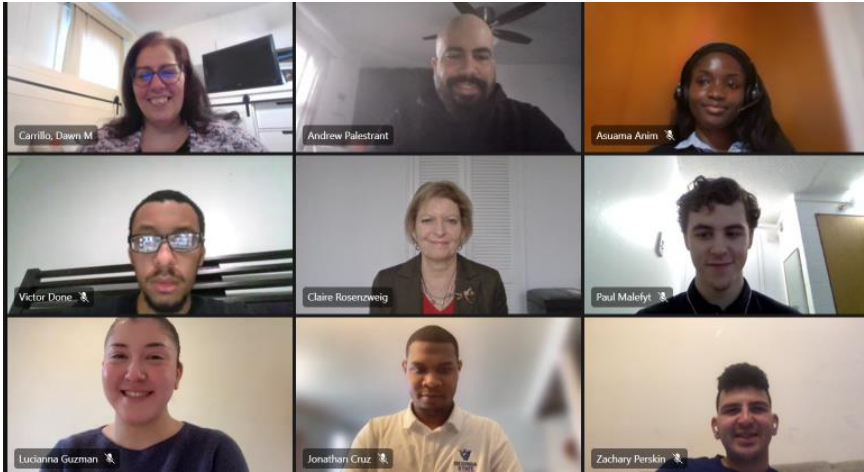
Intern Hours for 2020		Number of 2020 Interns		Cases/Reports Assisted by Interns in 2020	
1,228	Charity Accountability	8	Charity Accountability	140	Charity Accountability
5,600	NYC (Dispute Resolution)	29	NYC (Dispute Resolution)	30,765	NYC (Dispute Resolution)
6,828	Total	37	Total	30,905	Total

Interns are actively recruited from a wide variety of schools. 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.



Spring 2022 interns attending the career session presented by Dawn Carrillo, Vice President, TD Bank, and BBB Foundation Board member, via Microsoft Teams videoconference.



Fall 2022 interns attending a career session with Tim Zuber Partner, KPMG, and Metro New York BBB Board Member, via Teams videoconference.

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 this intern experience met their expectations, a Summer 2022 charity program (NYCAP) intern said, "I think the internship did meet my expectations and I enjoyed my time working at the BBB. I loved the opportunities it provided In the Career Building Sessions where we got to network and link up with experienced people in the workforce who were so open-minded to sharing their knowledge, expertise, and advice as well as getting to know the interns."

When asked about the most interesting aspect of their internship at the BBB, one Spring 2022 Dispute Resolution (DR) intern answered: "I found the process of talking to consumers and businesses over the phone to be very engaging and interesting. I especially like cases where I can give a consumer a referral or piece of information that resolves their dispute."

When asked if the skills learned through the internship would be used in a future career, a Fall 2022 intern commented, "I am so grateful for this internship, it taught me so much. I feel way more prepared to go into the work force soon. It made me manage my time and be extremely productive."

We are grateful to **Major League Baseball, TD Bank** (through a reallocation of a prior grant), **BBB Foundation board Chair Steve Perazzoli**, and **Jane and Rabbi Abraham Krantz Family Foundation** for their generous donations in support of the BBB Foundation's Skill-Building Volunteer Intern Program in 2022.

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 and others.

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. Using the initial DEI survey results, the joint committees selected 6 top recommendations for further action steps. These recommendations have guided subsequent efforts to further DEI goals.

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 new language is now cited with the BBB Foundation's principal mission statement in the front of this annual report.

Through the IABBB (International Association of Better Business Bureaus), BBB and BBB Foundation staff have been provided with access to DEI training programs. These trainings were recorded and are now available through an online training platform for future employees. Further, in 2022, IABBB offered a DEI survey to the BBB system, to obtain a baseline sense of DEI progress across all BBB organizations. DEI committees have been formed by IABBB which include Metro New York representatives. In addition, local arrangements were made to provide DEI insights to a joint meeting of the Metro New York BBB and Foundation DEI board committees.



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, academics, 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 continuing pandemic conditions in 2022, BBB Foundation educational programs - such as its 2022 Forum on Corporate Responsibility and webcasts in its 2022 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.

In 2022, 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. The BBB Seal is widely recognized as *The Sign of a Better Business*SM.

Every year, millions of consumers and businesses turn 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 2022, consumers turned to BBB Metro New York over 6.65 million times to view BBB Business Profiles and Charity Reports. In the 2022 year, consumers sought services from BBBs across North America more than 250 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. Starting in June 2022, Metro New York's BBB celebrated its Centennial year, continuing into 2023. 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.



Metro New York BBB Foundation Board of Trustees and Officers 2022

Chair

Steve Perazzoli, CPA
Partner, Asset & Wealth Management
PricewaterhouseCoopers LLP

Vice Chairs

Richard Brown
Founder
Strategic Intersections, LLC

Pamela Haas
Principal Consultant
PMH Consulting

Treasurer

Cathryn McAleavey
Principal
BDO

President

Claire Rosenzweig, CAE
President & CEO
Better Business Bureau Serving
Metropolitan New York
(*Ex Officio, Non-voting*)

Directors

Laurie J. Bilik
President
Global Human Resources

Brandi Boatner
Manager, Digital & Advocacy Communications
Global Influencer Marketing
IBM

Dawn M. Carrillo
Vice President-Regional Sponsorship Manager
TD Bank

Daniel B. Kaplan
Assistant Professor, Faculty Director,
Project Director
Adelphi University

Elinor Litwack, CPA
Partner, Outsourced Accounting & Advisory
Services
GRF CPA's & Advisors

Alicia McGrath
Executive Vice President, Mission
Goodwill Industries of Greater New York &
Northern New Jersey

Candice Meth, CPA
Partner, National Leader,
Not-for-Profit Services Practice
EisnerAmper

David Okorn
Executive Director
Long Island Community Foundation
(*Chair Emeritus*)

Metro New York BBB Foundation Statement of Activities 2022

	Year Ended December 31, 2022		
	Without Donor Restrictions	With Donor Restrictions	Total
SUPPORT AND REVENUE			
Contributions	\$ 109,949	\$ 102,384	\$ 212,333
Interest income	929	-	929
Seal Program income	172,937	-	172,937
Seal review income	15,000	-	15,000
Income from related party	11,472	-	11,472
Contributions of nonfinancial assets	28,901	-	28,901
Net assets released from restrictions	120,500	(120,500)	-
Total Support and Revenue	459,688	(18,116)	441,572
EXPENSES			
Program Services			
Charity accountability program (C.A.P.)	210,506	-	210,506
Education initiatives	123,394	-	123,394
Total Program Services	333,900	-	333,900
Supporting Services			
Management and general	80,682	-	80,682
Fundraising	14,920	-	14,920
Total Supporting Services	95,602	-	95,602
Total Expenses	429,502	-	429,502
Change in Net Assets	30,186	(18,116)	12,070
NET ASSETS			
Beginning of year	1,052,659	74,838	1,127,497
End of year	\$ 1,082,845	\$ 56,722	\$ 1,139,567

Contributions of non-financial assets were for *pro bono* media to distribute educational public service announcements (PSAs). Previously received 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.