MEASURING THE PHILANTHROPY OF THE CABLE INDUSTRY

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Submitted by:

Charles H. Patti, Ph.D., Ronald R. Rizzuto, Ph.D., and Maria M. van Dessel, Ph.D.,
all of the University of Denver and The Cable Center
Denver, CO 80210

Contact:
Charles H. Patti
Email: cpatti@du.edu
Tel.: 720.212.6971

EXECUTIVE SUMMARY

In July 2015, NCTA commissioned a study of corporate philanthropy (corporate giving) of the cable industry. The study had three objectives: (1) measure the volume of corporate philanthropy of the cable industry, (2) assess the impact of philanthropy/corporate giving, and (3) identify notable examples of philanthropy/corporate giving by the cable industry.

Over a period of six months, the research team designed and conducted a study that utilized an electronic survey among the industry's leading cable multiple system operators (MSOs), programmers, and vendors. The study also used secondary research sources, including IRS 990 forms, reports on corporate social responsibility (CSR), company websites and documents, and a range of other relevant published reports and online materials. While not part of the study's original charge, the research team studied the corporate giving of charitable foundations that are also part of the cable industry.

Information was collected on 14 MSOs that represent 94% of cable subscriptions in the U.S., 14 programmers that represent 73% of program subscriptions, four of the largest cable industry vendors, and 30 foundations.

In 2014, the total amount of corporate giving in the cable industry exceeded $1.2 billion. Non-cash (in-kind) contributions account for the largest category of giving and include free airtime (public service announcements), free and reduced cost internet and broadband connectivity, as well as goods and services. Among the program areas supported by cable industry corporate giving, focal areas include: equality and diversity, education, and community and economic development.

94%
of cable subscribers covered

73%
of cable program subscribers covered

32
companies surveyed

over $1.2B

over 658K volunteer hours

over $10M from employees

in total giving

MAJOR PROGRAM AREAS

COMMUNITY AND DEVELOPMENT

EQUALITY AND DIVERSITY

EDUCATION

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Introduction, Objectives, and Report Structure

In recent years, organizations have steadily increased their interest and commitments to the concept, practice, and measurement of corporate social responsibility (CSR). Over the past fifty years, CSR has embraced several dimensions of organizations' behavior, including responsibility for a wide range of corporate actions that affect all stakeholders: consumers, employees, investors, communities, and others. In addition to business practices and product-related activities, CSR also includes philanthropy (corporate giving), which is measured by such activities as cash donations, donation of products and/or services, employee volunteerism, charity events, promotion of public service announcements, etc.[1][2][3][4]

The cable industry has long been involved in corporate philanthropy. For two decades, the cable industry has provided free Internet connectivity to primary and secondary schools as well as libraries. The industry has an even longer tradition of supporting education, community non-profits, and disaster relief efforts through cash donations, in-kind contributions, and free public service announcements. The types of corporate philanthropy within the cable industry are illustrated by the work of the many companies and foundations highlighted in this report.

Despite the industry's long-standing and deep participation in corporate philanthropy, there is a shortage of information on the volume of corporate giving and its impact. To address this lack of information, NCTA engaged a research team from the University of Denver and The Cable Center to explore the financial-giving activities of the cable industry.

This study commenced in July 2015 and over six months, the researchers conducted a multi-faceted research project that involved compiling a survey list, creating an electronic survey questionnaire, conducting the survey, exploring various sources of secondary sources of information, analyzing the survey data, and summarizing the compiled information into this report.

The survey covered philanthropy/corporate giving for the 2014 fiscal year, from 14 MSOs, 14 programmers, four (4) suppliers to the cable industry (vendors) and 30 foundations that originated from the cable industry. Foundations that were born out of the cable industry include public charities and private foundations supported by an individual, family, or corporation. Both types of foundations that have ties to the cable industry are included in this study.

This research project did not collect primary data from foundations, but secondary research—primarily through IRS990 reports and foundation websites—uncovered a list of philanthropic activities conducted through cable-related foundations. Beyond the dollars donated, we explored other relevant approaches to assessing impact. These included identifying programs of focus, reasons for giving, and company measures of impact.

Data were gathered on six key approaches that companies can engage in to support charitable giving. The funding types surveyed were:

- direct cash
- foundation cash
- non-cash (in-kind) contributions
- program and management costs associated with the administration of giving by employees and agents
- employee matching-gift donations
- employee volunteerism.

This study had three objectives: (1) measure the volume of corporate philanthropy within the cable industry, (2) assess the impact of philanthropy/ corporate giving, and (3) identify notable examples of philanthropy/corporate giving by the cable industry. This report is structured around the findings within the three objectives.

Collecting Giving Information

Table 1 contains a summary of the volume of corporate philanthropy within the cable industry. This research identified contributions from four (4) key areas in the cable industry: (1) MSOs (multiple system operators), (2) Programmers (cable networks), (3) Vendors that are direct suppliers to the cable industry, and (4) Foundations established by organizations or individuals whose careers started in the cable industry.

Collecting philanthropic giving data has a number of complexities, including:

- Some organizations do not disclose their giving due to corporate policy.

- All companies included in the survey do not systematically maintain records of giving.

- Several of the surveyed companies are divisions of a parent company, and corporate giving data are aggregated at the corporate level and not available at the division level.

- Some companies maintain records of only portions of the data sought in this study, e.g., employee volunteer hours, but not dollar-value of employee volunteer hours.

As a result of the above points, this study employed three types of data: reported data, adjusted data and derived data. Definitions for these three types of data are explained as follows:

▸ **Reported Data.** The sources for this data are: survey respondents' answers, CSR reports, and 2014 IRS 990 forms.

 Example: Responses to the six (6) data-seeking questions on the survey questionnaire—or, in some cases, the respondents' answers provided in an email, CSR reports, and IRS 990 forms.

▸ **Adjusted Data.** The sources for reported data were adjusted due to obvious anomalies in the figures stated. This type of data emerged from the observation of contradictory numbers in CSR reports to the numbers reported in the survey questionnaire. Minor, straightforward, logical adjustments were made to information contained in CSR reports and the survey questionnaire.

Example 1: A CSR report shows worldwide data for a company and because this project sought only U.S. data, a percentage of sales to reflect the proportion accounted for U.S. operations was used. Formulas used for all calculations are provided in **Appendix 2**.

Example 2: Numbers reported in the CSR report are inconsistent with numbers reported in the survey questionnaire. This may be the result of the survey respondent not being aware of, or unable to obtain, all contributions made by the company. Numbers reported in the CSR report were deemed more accurate and data were adjusted accordingly.

Example 3: Reported data may include overall giving for a company; however, this project also collected responses from subsidiaries. To avoid double-counting, the reported data were adjusted to reflect contributions from each of the organizational divisions.

▸ **Derived Data.** The sources for these data were derived by augmenting information from CSR reports, IRS 990 forms, and responses to the survey questionnaire.

Example 1: 2014 IRS 990 data were not available and a calculation of financial giving was determined by averaging the amount of giving in the previous three years.

Example 2: A company reported the total number of employee volunteer hours but not the dollar value of those hours. This study used aggregate data to calculate a weighted industry average of hourly value, taken from the data provided by the respondents.

▸ **Extrapolated Data.** No survey includes responses from every unit in a population; therefore, the amount of financial giving reported here is less than the total giving in the cable industry. To estimate the total amount of giving in the industry, it is possible to extrapolate the data contained in this report to all of the companies in the industry. We have *not* calculated extrapolated data in this report.

Data Type	MSOs	PROGRAMMERS	VENDORS	FOUNDATIONS	TOTAL
REPORTED DATA Survey responses, CSR report data, IRS990 data	318.19	345.61	1.51	107.01	772.32
ADJUSTED DATA Minor adjustment to survey responses or CSR report data	84.74	68.23	0.0	0.0	152.96
DERIVED DATA Missing data is calculated using primary and secondary sources.	7.79	185.09	84.78	58.26	335.93
TOTALS	410.72	598.93	86.29	165.27	1,261.21

Giving Summary

We have a very high confidence in the values presented in all three types of data; however, it is important to understand that the complexities of collecting philanthropic data required multiple approaches. The sources of information used in compiling the total amount of philanthropic giving in the cable industry were:

- Responses to the online questionnaire
- Corporate Social Responsibility (CSR) Reports
- Return of Organization Exempt From Income Tax form (IRS 990)
- Information provided via email responses from survey respondents
- Company websites and printed documents

In total, over $1.2 billion in corporate philanthropy was given by the cable industry in 2014. Of that total, more than $400 million was given by MSOs, $599 million was given by programmers, $86 million was given by vendors, and $165 million was given by cable foundations.
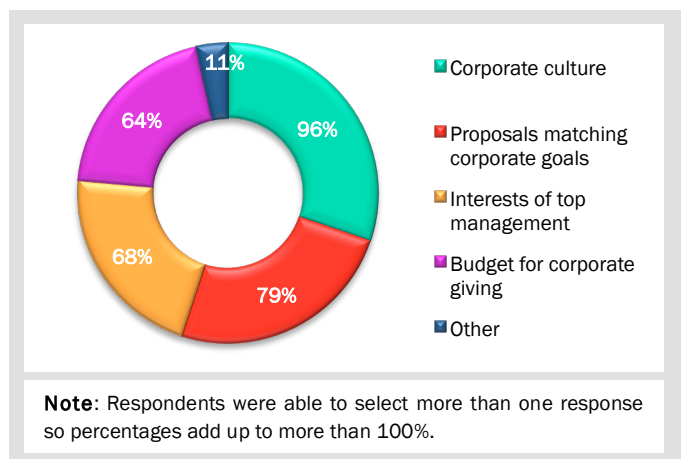
The figures reported in **Table 1** represent all types of giving, comprising direct cash, non-cash (in-kind) donations, employee matching-gift contributions, paid release-time to support employee volunteerism and the expense incurred by a company to coordinate the associated program and management costs of charitable giving by employees and agents. A detailed breakdown of each type of giving is provided in the following sections of this report.

Approaches to Giving

It is also useful to understand how companies determine what allocation will be made for philanthropy/corporate giving. Most companies (68%) provided a pre-determined amount in the budget, whereas others (32%) make more fluid decisions on an opportunity and/or need basis.

As shown in **Figure 1**, corporate culture of giving proved the strongest driver of funding support (96%), while 79% of companies also focused on proposals that matched its corporate goals and 68% funded initiatives that matched the interests of top management. Budget constraints were also important for 64% of companies.

Figure 1: Drivers of Giving, 2014 (% selected)

Note: Respondents were able to select more than one response so percentages add up to more than 100%.

Determining Allocation of Giving

Knowing how companies determine giving levels and what their anticipated giving is in the future are helpful information in understanding the giving process. In terms of future giving allocation, 63% of companies expect to maintain current levels, whereas 33% of companies anticipate increasing current levels. Only 4% of companies indicated a reduction in the current level of philanthropic (corporate giving) activities.

Companies use a variety of approaches to determine the level of their financial giving; however, most companies (69% of respondents) use a pre-determined amount in their annual budget, while others take more flexible approaches, including: discretion of senior executives, evaluation on a case-by-case basis, alignment with corporate values, doing "what feels right" for the company and the communities it serves, and "opportunities as they arise."

Types of Giving

To encourage consistency of responses, operational definitions of types of giving were created. Types of giving were defined as:

▷ **Direct Cash.** Cash giving from corporate headquarters, regional offices and subsidiaries

▷ **Non-cash (in-kind).** Contributions such as donated goods, services and/or airtime

▷ **Employee matching-gift programs.** Year-Round giving (payroll giving programs), Workplace Giving Campaigns, Dollars for Doers, Disaster-Relief, etc.

▷ **Employee volunteerism.** Paid release-time, donation of time, etc.

▷ **Program and management costs of charitable giving.** The cost of the company coordinating the administration of giving by employees and agents (e.g. payroll deductions). This does not include the company's cash costs associated with employee matching-gift programs.

Financial Value of Giving

In terms of dollar-value, contributions made in 2014 across the cable industry are significant. Among the 14 MSOs participating in the survey, conservative estimates for direct cash contributions totaled $44M, with a further $344M in non-cash (in-kind) contributions. Among the 14 programmers included in the survey, direct cash contributions were estimated at $143M and $443M in non-cash (in-kind) contributions. Of the four cable industry vendors, direct cash contributions were estimated at approximately $1M, with a further $85M donated for non-cash (in-kind) contributions. Thus, as shown in **Table 2**, contributions by the cable industry exceed $1B for direct cash and in-kind contributions alone. These figures do not include significant donations to communities made by charitable foundations that originated from donations from the cable industry. In 2104, contributions by these foundations provided a further $163M in donations to charitable causes.

Table 2: Types of Giving, 2014 ($millions)

Type of Giving	MSOs $	MSOs %	PROGRAMMERS $	PROGRAMMERS %	VENDORS $	VENDORS %	FOUNDATIONS $	FOUNDATIONS %	TOTALS $	TOTALS %
DIRECT CASH	44.03	10.7	142.93	23.9	1.10	1.3	163.31	98.8	351.43	27.9
IN-KIND	344.70	83.9	442.82	74.0	84.67	98.1			872.19	69.2
EMPLOYEE MATCHING-GIFTS	5.17	1.3	2.08	.04	.32	.4	1.9	1.2	10.06	.8
VOLUNTEERISM ($) VALUE	15.12	3.6	8.20	1.4	.20	.2			23.52	1.9
ADMIN OF CHARITABLE GIVING ($) VALUE	1.70	.04	2.30	.04					4.00	.3
TOTALS	410.72	99.7	598.33	99.4	86.29	99.7	165.23	99.0	1,261.21	100.0
EMPLOYEE VOLUNTEERISM # OF HOURS	344K hours		268K hours		46K hours				659K hours	

Note: Where totals do not add up to 100%, the anomaly is due to rounding.

OBJECTIVE 2: IMPACT OF PHILANTHROPY/CORPORATE GIVING BY THE CABLE INDUSTRY
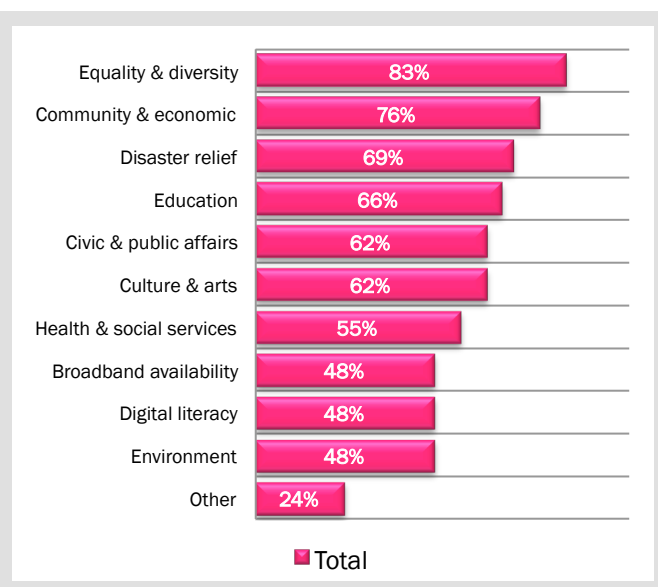
Giving by Program Area

The financial giving of the cable industry has a broad and deep impact, encompassing a variety of areas of service that impact millions of people in communities throughout the U.S. Many of the giving initiatives have been in place for years and others are more recent programs launched in response to community needs and opportunities. For example, this research discovered over 30 cable industry-supported charitable foundations whose sole purposes are to provide resources to dozens of activities that benefit communities, education, and special-need individuals.

Programs of Focus

During the 2014 fiscal year, equality and diversity (e.g. minorities, disabled, women, etc.) was supported by the most companies, as shown in **Figure 2**. Other areas of focus include community and economic development, education, and disaster relief. The information on the programs of focus does not include dollar amounts of investment or the complete range of activities supported.

A detailed description of projects within each program area is provided in the *Objective 3* section of this report. The survey results also show that no single program area is a priority across all industry sectors with most companies (46%) indicating they do not have a program area that is identified of primary interest for their philanthropic (corporate giving) activities.

Reasons for Giving

During the 2014 fiscal year, the key drivers for corporate giving included good corporate citizenship, advancing education and development, as well as sponsoring activities that a company's customers support. As shown in **Figure 3,** the least important driver is to gain financial benefits beyond tax concessions.

Figure 3: Purpose of Giving, 2014 (% selected)

Figure 2: Giving by Program Area, 2014 (% selected)
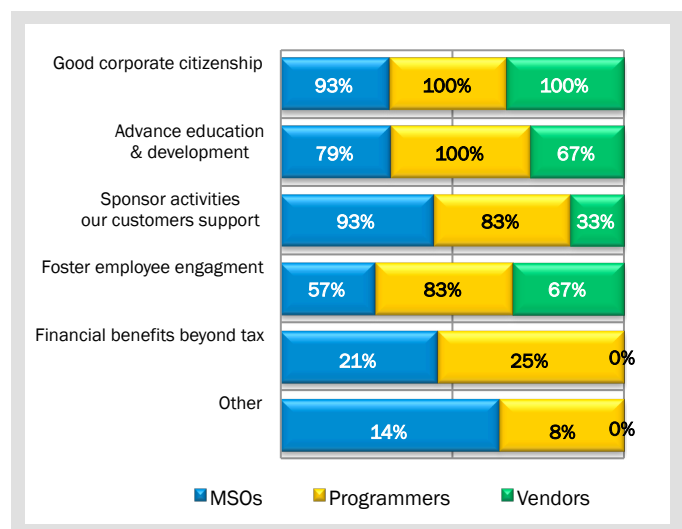
Giving by Employees

This study also explored the philanthropic involvement of employees (and the financial value of such involvement). Today, almost one-third of U.S. corporations are engaged in some form of employee volunteerism and this engagement is now often incorporated as part of a company's Corporate Social Responsibility (CSR) reports or its Corporate Citizenship strategy.[5] The growing interest and support for employee engagement programs are fueled by the broader benefits that are generated for various stakeholders.[6]

In addition to the community, or other recipients of employee volunteer programs, the company often enjoys an improved corporate image and relations with external customers and shareholders. For employees, advantages include: boosting morale, loyalty and overall satisfaction, fostering team building, improved productivity and motivation, positive influences on recruitment and retention, as well as the opportunity for individuals to make a positive contribution to society.[7]

Employee engagement efforts can be defined in a number of ways; however, this survey measured planned, managed efforts that were designed to motivate and enable employees to give—both time and money—under the sponsorship or support of the company. Following the *Giving in Numbers* report by the CECP,[8] two over-arching types of employee engagement were measured: (a) employee matching gift programs, whereby companies financially matched employee contributions (either time or monetary), and (b) employee volunteerism.

Definitions for each type of employee engagement are shown in **Table 3.** A summary of the mix of employee engagement supported by companies in the cable industry is also provided.

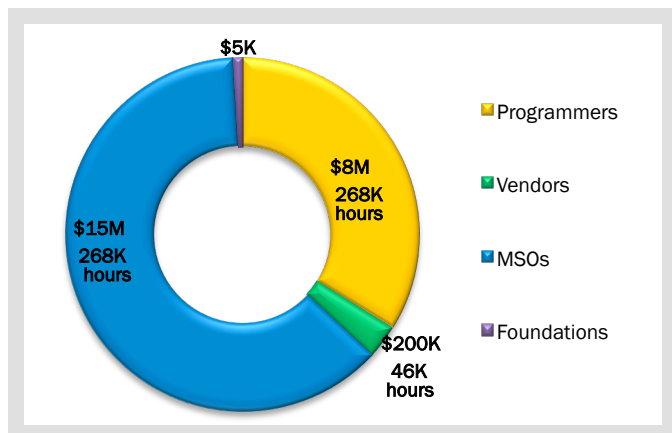### Table 3: Types of Employee Engagement, 2014 (% selected)

Mix of Employee Engagement Types	Participation By Industry Group			TOTAL
	MSOs	PROGs	Vendors	
EMPLOYEE MATCHING GIFT PROGRAMS				**53%**
YEAR-ROUND MATCHING-GIFT POLICY Match payroll deductions donated by employees.	0%	25%	33%	**27%**
WORKPLACE GIVING CAMPAIGNS Match giving by employees to a single qualifying non-profit organization/cause.	29%	42%	33%	**73%**
DOLLARS-FOR-DOERS Employees volunteer time for their favorite cause and the company matches volunteer hours with a financial donation to the nonprofit.	0%	42%	0%	**33%**
OTHER	7%	0%	0%	**7%**
EMPLOYEE VOLUNTEERISM				**83%**
COMPANY-WIDE DAYS OF SERVICE Paid release-time programs so employees can participate in a company-wide, group volunteer effort.	29%	58%	33%	**50%**
EMPLOYEE VOLUNTEERISM ON COMPANY TIME Paid release-time programs so employees can volunteer their time to causes they care about.	57%	75%	0%	**71%**
EMPLOYEE VOLUNTEER AWARDS To recognize and encourage employee engagement in volunteerism activities.	29%	50%	33%	**50%**
LEADERSHIP Donation of time and expertise of senior management to Boards and/or committees of nonprofit organizations.	64%	83%	67%	**92%**
OTHER	7%	17%	33%	**21%**

Employee Volunteerism

Employee volunteerism was ranked the third most-favored type of philanthropy by companies (83%), behind direct cash (100%) and in-kind (97%). But measuring this investment is difficult, not only with respect to time and money, but also impact. The ability to measure the impact of philanthropic (corporate giving) investment is difficult, yet measurement of employee volunteering presents an even greater challenge. The most common way is to monetize the value of services provided by volunteers, by calculating the total number of reported service hours, multiplied by the value (rate) of the services they provided. However, this approach can fail to accurately capture higher-value activities, such as leadership activities that include the donation of time and expertise of senior management. Further, these calculations do not capture the many positive social and business ripple effects that can result.

Figure 4 provides a snapshot of the recorded volunteer service hours by cable industry employees, which included paid-time release for employees to volunteer their time for charitable causes and the donation of time and expertise by senior management to Boards and/or committees of nonprofit organizations. Of the MSOs that reported "number of hours" for employee volunteerism, hours of service was estimated at over 344,000 hours, with a calculated value of more than $15M. Similarly, of the programmers that reported service hours for employee volunteerism, approximately 268,000 hours were logged at an estimated value of over $8M. Employees from vendor companies to the cable industry contributed a further 46,000 service hours, valued at approximately $200K. Overall, the conservative estimate for 2014 was in excess of 658,000 hours at an estimated value of $23.5M.

Feedback from participants indicated that not all companies have systems in place to track the number of hours donated by employees, and many companies do not attribute a dollar value for this type of philanthropy. As previously mentioned, a weighted average hourly rate was used to estimate monetary value of employee volunteerism where respondents provided a figure for volunteer service hours. Nevertheless, the values for volunteerism reported here understate the true value of volunteering efforts by employees in the cable industry.

As shown in **Figure 5**, companies in the cable industry supported all types of employee volunteerism and, most notably, at the senior executive level. Across the industry, 92% of companies supported leadership volunteerism by senior management through the donation of time and expertise to Boards and or/committees of nonprofit organizations. Companies also support paid release time in support of employees volunteering for causes they care about (71%), as well as paid release time of employees to participate in company-wide, group volunteer efforts (50%), as well as employee volunteer awards (50%) to recognize and encourage greater involvement by employees in volunteer initiatives.

Figure 4: Employee Volunteerism, 2014 ($ and hours)

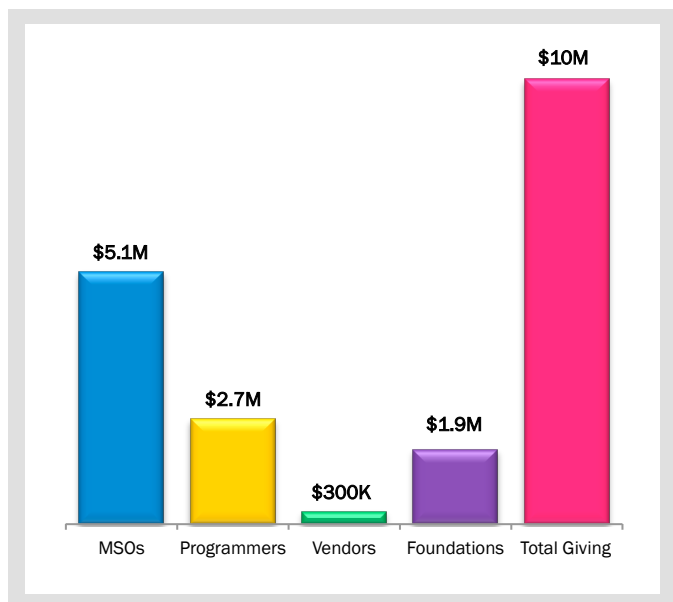Figure 5: Volunteering Types, 2014 (% selected)
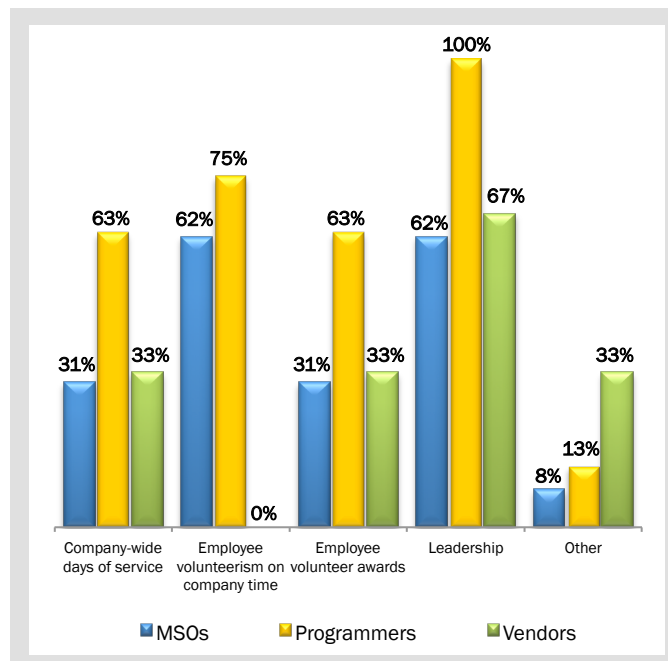
Employee Matching-Gift Programs

In 2014, of the 32 companies surveyed, 53% supported employee matching-gift programs and 83% supported employee volunteerism. Programmers reported greater support for employee engagement programs, backing all types of employee-matching gift programs and volunteer programs, as shown in **Table 3**. When reviewing these results, it is important to keep in mind that these findings may be an artifact of more advanced reporting systems and not necessarily the scope, or extent, of contributions with respect to employee engagement.

Employee matching-gift programs were primarily supported in terms of workplace giving campaigns. In 2014, 73% of companies matched giving by employees to a single qualifying non-profit organization or cause (see **Table 3**). To a lesser extent, companies supported year-round matching gifts by way of matching payroll deductions given by employees (27%), while Dollars-for-Doers donations were supported by 42% of Programmers (but not by MSOs or Vendors).

Figure 6 displays the financial value of matching-gift programs that provided a further $10M of direct cash donations to various charities, nonprofits, and social causes in local communities.

Administration of Giving

The costs associated with coordinating a company program and the costs of administering charitable giving by employees were additional forms of corporate giving measured in the survey. These administrative and management expenses are not the company's cash costs associated with employee matching-gift programs.

In 2014, approximately half of the survey respondents reported that their companies support administrative and management costs associated with giving. **Figure 7** summarizes participation by each industry group and the financial value attributed to these costs. Cable operators and programmers invested over $4M to administer programs and manage charitable giving by employees in 2014. The survey responses from Vendors indicated "nominal" investment for the administration of giving and many other respondents were unable to provide firm monetary values. Anecdotal feedback revealed that, in many cases, this type of giving was impossible to estimate as systems are not in place to track these expenses and/or falls below detection. Thus, the amount of this type of philanthropic (corporate giving) activity is likely to be greater than what is reported in the survey results.

Figure 7: Administration of Giving, 2014 (% selected and in $millions)
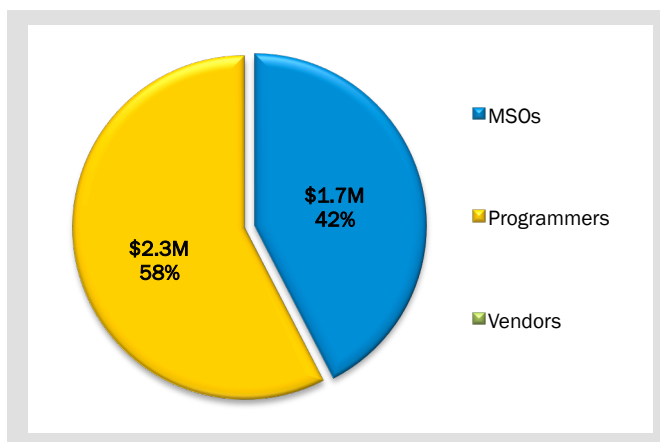
Figure 6: Matching-Gifts, 2014 ($millions)

The cable industry focuses its philanthropic attention on the following program areas:

- *Equality and Diversity*—advocating and giving voice to diverse groups

- *Community and Economic Development*—providing support for safe and healthy homes, food for families and workforce development programs

- *Education*—supporting K-12 and higher education

- *Culture and the Arts*—supporting the creation of art (i.e., storytelling), the preservation of art, and/or broadening the public's access to art/culture

- *Health and Social Services*—supporting programs and organizations that promote wellness as well as support for individuals dealing with health issues such as breast cancer and social issues such as domestic violence

- *Civic and Public Affairs*—supporting the dissemination of 'unedited' news and information regarding civic and public affairs to the public

- *Broadband Availability* and *Digital Literacy*—providing access to broadband connectivity and the development of skills in using digital tools and information

- *Disaster Relief*—supporting individuals and communities impacted by natural disasters

Table 4 provides an overview of the industry's engagement in types of philanthropy. The information in this Table does not present a comprehensive listing of the types of philanthropy, but rather it highlights the activities identified in the Qualtrics Survey, company CSR Reports, or company websites.

Table 4: Overview of Philanthropy Examples by Program Type, 2014

Category of Project	Philanthropy Examples
EQUALITY AND DIVERSITY	• BET: Leading Women Defined • MTV: Look Different campaign • Viacom: GLAAD Spirit Day and World Autism Awareness Day • Scripps: Share Our Strength and No Kid Hungry Partnerships
COMMUNITY AND ECONOMIC DEVELOPMENT	• Charter Our Community: Safe and Healthy Homes • Comcast Cares Day • Country Music Television: Empowering Education Community College • Discovery: Discover your Impact Day • Disney: Friends for Change Creating Program • Nickelodeon: HALO Effect • CSG: Support for Affordable Housing
EDUCATION	• Bright House: STEM • Mediacom: Scholarship Program • Time Warner Cable: Connect a Million Minds • Disney: Creativity Learning Program with Boys & Girls Clubs of America • Disney: First Book Program • Nick Jr: Beyond the Backpack • VH1 Save The Music Foundation • Viacom: Get Schooled • Ovation STEAM • Broadcom: STEM Education • Cisco: STEM support with MIND Research Institute • Cisco: Network Academy • Arris: STEM
HEALTH AND SOCIAL SERVICES	• Midcontinent: Support for health and welfare • ESPN: Support for the Cancer Research V Foundation and work with non-profits to foster physical development • HBO Concert for Valor • Showtime: HIV/AIDS Awareness and Breast Cancer Activism • Spike: Veterans Operation Wellness • Viacom: NO MORE campaign
CULTURE AND ARTS	• General Communications: Support for AFN Convention • Sjoberg: Sponsor of community theater • Time Warner: New Works/ New Voices Initiatives in Support of Storytellers • Time Warner: Support of the Arts and Cultural Institution to Broaden Public Access
CIVIC AND PUBLIC AFFAIRS	• C-SPAN: news and information on civic and public affairs
DISASTER RELIEF	• A+E: Support of Team Rubicon • Discovery: Disaster Relief and Rebuilding Program
BROADBAND AVAILABILITY AND DIGITAL LITERACY	• Comcast: Internet Essentials and digital literacy training (Internet Essentials) • Mediacom: Free video and broadband services for schools, libraries and other public institutions • Time Warner Cable Learning Labs • Cisco: Digital Divide Data

Notable Program Examples

An objective of philanthropy in support of *Equality and Diversity* is to help build inclusive societies by advocating and giving voice to diverse audiences. Scripps Interactive Networks and Viacom have been at the forefront of this type of philanthropy, including the following initiatives:

- Scripps has partnered with Share Our Strength's No Kid Hungry campaign to end childhood hunger in America by ensuring all children get the healthy food they need, every day.

- BET's Leading Women Defined annual conference has helped set a national agenda for the black female community, emphasizing education, leadership, family, health and activism for women and girls.

- MTV's Look Different inspires young people to take action against bias.

- Viacom's GLAAD Spirit Day takes a stand against bullying LGBT youth among companies, individuals, schools, and organizations.

- Viacom World Autism Awareness day supports Autism Speaks, World Autism Awareness Day (WAAD) and other initiatives to share accurate information about autism and promote positive, respectful attitudes toward people living with the condition.

At least ten different cable entities provided support for *Education*. These included:

- Support for STEM education (Bright House, Time Warner Cable, Arris, Broadcom and Cisco);

- Scholarships for college (Mediacom);

- Disney's creativity program for middle school children and its book donation program to schools ("First Book");

- Viacom's Get Schooled program (motivating high school kids to stay in school), VH-1's Save the Music Foundation (partners with school districts to build sustainable music programs in public elementary and middle schools) and Nick Jr.'s Beyond the Backpack program (provides resources, tips and activities to help parents prepare preschoolers for kindergarten);

- Cisco's Networking Academy (development of IT skills).

EQUALITY AND DIVERSITY

Programmer
Scripps' Share our Strength and No Kind Hungry Partnerships
BET's Leading Women Defined
MTV's Look Different
Viacom's GLAAD Spirit Day
Viacom's World Autism Awareness Day

EDUCATION

MSO
Bright House STEM
Mediacom—Scholarship Program
Time Warner Cable—Connect a Million Minds

Programmer
Disney's Creativity Learning Program with Boys & Girls Clubs of America
Disney's First Book Program
Nick Jr.'s Beyond the Backpack
Ovation STEAM
VH1 Save The Music Foundation
Viacom Get Schooled

Vendor
Arris STEM Education
Broadcom STEM Education
Cisco and MIND Research Institute
Cisco Network Academy

Community and Economic Development, is the second most widely supported type of philanthropy (see **Figure 2**). This program area has broad participation among virtually all cable organizations. Charter, Comcast, Disney, Discovery, Scripps, and CSG developed an annual day of support that involves employees volunteering a day to give back to the community. These organizations also promote year-round initiatives, including two stand-out examples:

- Country Music TV (CMT) has partnered with the American Association of Community Colleges' Center for Workforce and Economic Development to launch the CMT Empowering Education Community College Initiative. This extensive grassroots campaign raises the visibility of education and workforce struggles in rural America to spur economic development solutions.

- Nickelodeon introduced the HALO Effect campaign in 2014 to spotlight young people doing extraordinary things and motivating others. HALO Effect recognizes one teen each month for positively impacting his or her community.

Health and Social Services support is a favorite philanthropy area among programmers as some of the issues are a natural fit for the content genre of the programmer. Some examples include:

- Showtime's support for HIV/AIDS and breast cancer activism

- ESPN's support for the V Foundation (cancer research), and its work with various non-profit organizations to foster the physical development of children.

- HBO's Concert for Valor is held to thank veterans and raise money to support veterans and their families.

- Spike's Veterans Operation Wellness (VOW) is intended to help veterans improve their physical and mental health and their sense of purpose.

- Viacom's NO MORE campaign takes the lead to bring domestic violence and sexual assault into the open.

Culture and Arts philanthropy includes support for story tellers (Time Warner New Works/New Voices); support for the institutions that house the arts and culture (Time Warner); and support for local theater (Sjoberg support for community theater). In Alaska, General Communications (GCI) proudly supports programs to preserve its rich culture, support nonprofit organizations

and youth education, and engage in community celebrations to build a stronger Alaska.
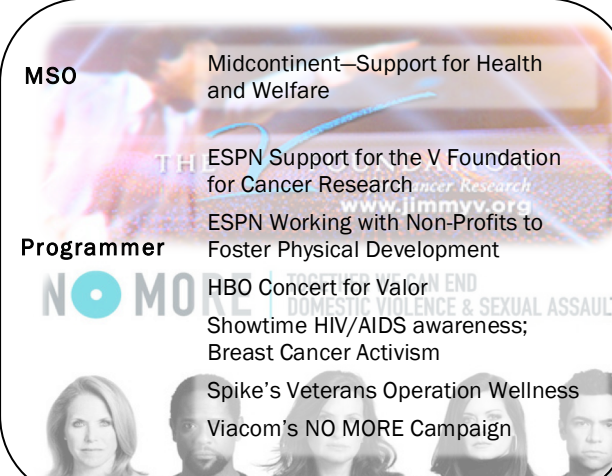
COMMUNITY & ECONOMIC

MSO

Charter Our Community—Safe and Healthy Homes
Comcast Cares Day

Programmer

Country Music Television—Empowering Education Community College
Discovery's Discover your Impact Day
Disney's Friends for Change Program
Nickelodeon's HALO Effect

Vendor

CSG—Support for Affordable Housing
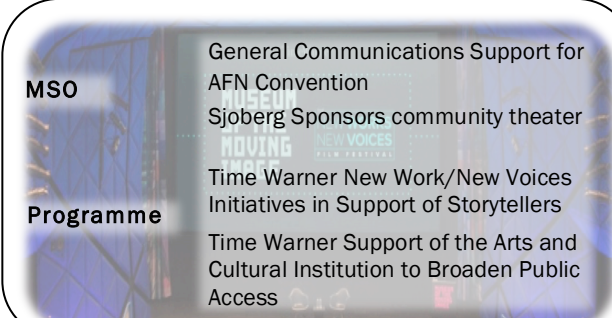
HEALTH & SOCIAL SERVICES

MSO

Midcontinent—Support for Health and Welfare

Programmer

ESPN Support for the V Foundation for Cancer Research
ESPN Working with Non-Profits to Foster Physical Development
HBO Concert for Valor
Showtime HIV/AIDS awareness; Breast Cancer Activism
Spike's Veterans Operation Wellness
Viacom's NO MORE Campaign

CULTURE & ARTS

MSO

General Communications Support for AFN Convention
Sjoberg Sponsors community theater

Programme

Time Warner New Work/New Voices Initiatives in Support of Storytellers
Time Warner Support of the Arts and Cultural Institution to Broaden Public Access

Civic and Public Affairs philanthropy is defined by the activities of C-SPAN. This programmer disseminates news and information regarding civic and public affairs to the public. Its coverage of political and policy events is unedited, thereby providing viewers (or listeners) with unfiltered information about politics and government. Non-political coverage includes historical programming, programs dedicated to non-fiction books, and interviews with prominent individuals associated with public policy. C-SPAN's networks are carried on most MSO channel line-ups and represent a seminal investment in civic and public affairs by the MSOs.

Disaster Relief philanthropy is generally a part of all cable organizations' philanthropy, but one notable program is the work of A+E with Team Rubicon. Team Rubicon unites the skills and experiences of military veterans with first responders to rapidly deploy emergency response teams. Discovery's Disaster Relief and Rebuilding Program was developed in response to large national and global disasters. Discovery also partners with Global Giving to launch employee matching campaigns. Discovery partners with rebuilding organizations, such as Habitat for Humanity, sending 125+ employees and on-air talent on a multi-day trip to disaster-stricken areas to rebuild and refurbish damaged homes.
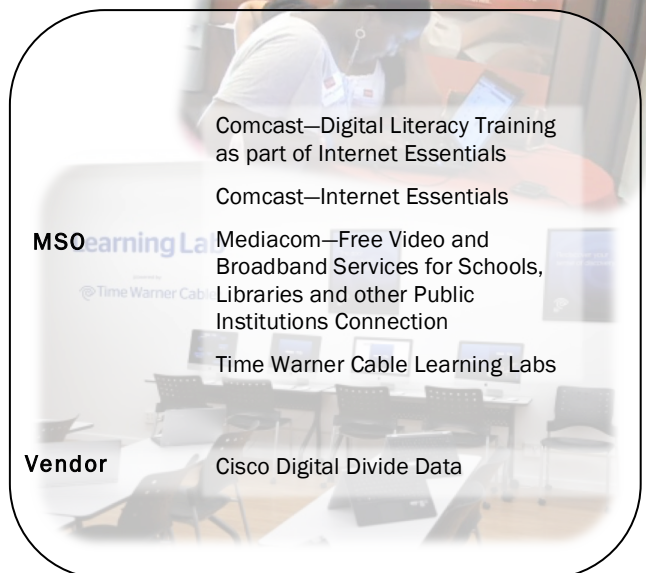
MSOs and Vendors support initiatives on *Broadband Availability and Digital Literacy.* Typically, MSOs have programs where free video and broadband services are provided to schools, libraries and other public institutions. Beyond this support, noteworthy programs include:

- Comcast's Internet Essentials program connects families to the Internet at home and, in concert with its community partners provides free digital literacy training and education for families.

- In New York City, Time Warner Cable Learning Labs is an initiative to provide New Yorkers with free access to computers and high-speed Internet. By partnering with local non-profit organizations, TWC is developing Learning Labs aimed at bridging the digital divide for communities in need across NYC.

- Cicso supports organizations that help individuals gain skills they need to find long-term employment and stable income.

CIVIC & PUBIC AFFAIRS

Programmer — C-SPAN civic and public affairs news and information

DISASTER RELIEF

Programmer
A+E support of Team Rubicon

Discovery's Disaster Relief and Rebuilding Program

BROADBAND & DIGITAL LITERACY

MSO
Comcast—Digital Literacy Training as part of Internet Essentials

Comcast—Internet Essentials

Mediacom—Free Video and Broadband Services for Schools, Libraries and other Public Institutions Connection

Time Warner Cable Learning Labs

Vendor
Cisco Digital Divide Data

APPENDICES

- Appendix 1: Research Methodology

- Appendix 2: Calculation Assumptions

- Appendix 3: Detailed Summary of Key Results

- Appendix 4: Profiles of the Research Team

- Appendix 5: References

APPENDIX 1: RESEARCH METHODOLGY

RESEARCH DESIGN

This study adopted inductive and deductive approaches. Deficiencies of a single-method study were overcome by employing more than one data collection and analysis method, referred to as triangulation.[1] The survey questions collected multiple responses from a wide scope of respondents to obtain a broad and more accurate précis of philanthropic (corporate giving) activities. Qualitative questions focused on collecting more in-depth information to add depth and color to philanthropic activities that provide high levels of impact to the community. Finally, secondary sources were used to provide alternative and supplemental data. Financial data provided by respondents was checked for accuracy with publicly available sources and, where relevant, augmented the study results.

Primary Research

Sampling Strategy

This study used a purposive sample design to obtain information from specific target groups in the cable industry— MSOs, Programmers, and Vendors—three segments that account for the largest economic impact. Using SNL Kagan reports, the NCTA Board, and the NCTA Public Affairs Committee, a list of contacts was generated using the following criteria to identify suitable prospects:

- MSO's representing 75% of U.S. cable subscriptions
- Programmers representing top 25% of industry
- Vendors representing the suppliers to the cable industry
- Members of the NCTA board
- Foundations that were originated by individuals or corporations related to the cable industry

A total of 48 subject organizations were identified across the three cable industry areas.

Survey Questionnaire

Using Qualtrics survey software, a questionnaire was developed to probe various aspects of philanthropy/corporate giving by companies during the 2014 fiscal year. The questionnaire opened with a qualifying question, asking respondents if their company participates in philanthropic (corporate giving) activities. If "no" was selected, the survey automatically moved to the end of the questionnaire. If the response was "yes," questions probed information about the types of philanthropy/corporate giving activities, the impact of these activities, estimated value of financial and non-financial contributions, as well as specific examples that provided high levels of impact to the community.

Survey questions were developed utilizing an in-depth analysis of corporate giving and employee engagement data from 261 of the world's leading companies conducted by the Committee Encouraging Corporate Philanthropy (CECP) in association with The Conference Board. The report, *Giving in Numbers: 2014 Edition,*[2] provided corporate giving benchmarks from ten industry categories and allowed for correlation of reported results specific to the cable industry.

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[1] Sarantakos, S. (1998). *Social Research,* 2nd edition. South Yarra, Vic: MacMillan Education Australia.

[2] CECP, in association with The Conference Board. *Giving in Numbers: 2014 Edition.* Available from: cecp.co/research or conference-board.org/publications.

The questions explored a mix of different types of philanthropy/corporate giving from direct cash contributions, non-cash (in-kind) contributions to various types of employee giving to encourage engagement and boost overall philanthropic outcomes. A detailed description of each measure is provided in **Table A1**. Opportunities to provide contact information for alternative respondents and open-ended questions were also offered to get further insights and information.

Table A1: Types of Philanthropic (Corporate Giving) Activities

Type of Giving	Description
Direct cash	Cash giving from corporate headquarters, regional offices and subsidiaries
Non-cash (in-kind) contributions	Contributions such as donated goods, services and/or airtime
Employee matching-gift programs	Year-Round giving (payroll giving programs), Workplace Giving Campaigns, Dollars for Doers, Disaster-Relief, etc.
Employee volunteerism	Paid release-time, donation of time, etc.
Program and management costs of charitable giving	The cost of the company coordinating the administration of giving by employees and agents (e.g. payroll deductions). This is not the company's cash costs associated with employee matching-gift programs

Pretest

The questionnaire and email cover letter were pre-tested prior to distribution. The pre-test comprised an expert panel of seven individuals that represented various sectors of the cable industry and the three research team members. Participants of the pretest were asked to evaluate the questionnaire and the cover letter with respect to readability, general logic and flow, as well functionality of the online survey software. The pretest feedback resulted in 60 separate recommendation/comments. The suggestions were carefully analyzed and many modifications were incorporated to form the final version of the questionnaire and the cover letter.

Procedure

The online questionnaire was distributed by way of a cover email with a personalized link to the questionnaire. Prior to distribution, Rob Stoddard, Senior Vice President, Communications & Public Affairs, NCTA, sent a "prompting" email to contacts. The purpose of this email was two-fold: (1) encourage participation with a direct request coming from the NCTA, and (2) validate the legitimacy of the study undertaken on NCTA's behalf. Two follow-up emails were sent, two weeks apart, after the initial email request. A further 33 contacts were emailed from a personal email to overcome the potential issue of emails being diverted to junk inboxes. Individual emails were sent to respondents who partially completed the questionnaire, encouraging them to complete the survey. NCTA also contacted key cable operators and programmers to encourage participation or to complete responses. Phone calls and additional emails were used to reach the ultimate decision-maker and to further encourage participation through assurances of confidential, aggregated data reporting.

Secondary Data Research

In addition to the primary research undertaken directly with companies in the cable industry, secondary sources were analyzed. These sources included: CSR reports, annual reports, company websites, and IRS 990 reports required by charities and non-profits. Information from these reports allowed for the inclusion of contributions made by cable-based foundations and cross-validation of financial data provided in the questionnaire and phone calls.

ANALYSIS PROCESS AND RESPONSE SUMMARY

Data Analysis

Descriptive analysis was conducted on multi-response option questions. A summary of the key financial data reported in **Appendix 5.** Open-ended questions generated a number of examples of high impact**.** Analysis of the key findings helped inform the study's recommendations.

Response Summary

The online survey was conducted over a 12-week period. A total of 30 responses were received from the three targeted groups—MSOs, programmers and vendors. Responses from 14 MSOs represented 94% of the total market shares of subscriptions and responses from 13 programmers represented 73% of the total market shares of subscriptions. Three of the six vendors also responded to the survey questionnaire. Secondary research generated information from one additional programmer and vendor, bringing the total to 14 programmers and four vendors. This provided an average response rate of 70% with a total of 32 responses included in the study, as presented in **Table A2.**

Table A2: Online Questionnaire Response Results

Sample Groups	Emails Sent		Responses		Response Rate	% of U.S. Subscribers
	Number	%	Number	%		
MSOs	16*	34%	14	44%	88%	94%
Programmers	25	53%	14**	44%	56%	73%
Vendors	6*	13%	4**	12%	66%	N/A
TOTALS	47*	100%	32	100%	70%	

* Includes one email sent to contacts from associated philanthropic foundations.
** Includes additional response generated from secondary research

Response rates

Low response rates are often a concern for any type of survey, particularly those administered online.[3][4][5] One study, evaluating response rates over a 15-year period, revealed a growing use of email surveys; however, average response rates are steadily declining.[6] The study reported a fall-off in the average response rates from 61.5% in 1986 to 24% in 2000—a drop of almost 40%. In some cases, response rates as low as 2% have been reported.[7] Given these trends in online survey response rates, the overall response rate of 70% for this study gives us confidence in the soundness of the data. Another factor that adds validity to the results of the survey is that the responses among the MSOs and programmers represent a very high percentage of cable and program subscriptions.

> *...the overall response rate gives us confidence in the data.*

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APPENDIX 2: CALCULATION ASSUMPTIONS

1. Calculation to establish weighted industry average for employee volunteerism hourly rate:
   - Reported total volunteer hours/ reported $ value of volunteer hours=317,952 ÷ 13,987,003 = $43.99

2. Calculation to estimate the ratio of direct cash and in-kind from the combined direct cash/in-kind total:
   - Reported total direct cash/Reported combined direct cash and in-kind total = average percentage ratio
   - Reported total in-kind/Reported combined direct cash and in-kind total = average percentage ratio

3. Comcast/NBCUniversal's CSR report published corporate giving in 2014 as a combined figure for cash and in-kind contributions. NBCU contributions were reported in the survey, so these figures were deducted to avoid double-counting. Comcast, NBC Universal also includes divisions non-cable divisions—broadcast television, filmed entertainment, Universal theme parks and Comcast Spectacular. Comcast/NBCU contributions for its cable and cable networks operations are estimated as a ratio of 2014 U.S. sales to total sales. Adjustment to reported figure are calculated as follows:
   - Cable sales/Total sales x US sales % = 44140/68775 =64.18% x 100%= 64.18%
   - Cable Networks/Total sales x US Sales %= 9563/68775 = 13.91% x 100% = 13.91%
   - Cable Network % x cable subscriber % =13.91% x 52.85%= 7.35%
   - Cable Sales + US Network sales to cable =64.18% +7.35% = 71.53%
   - The same ratio of direct cash to in-kind reported by NBCU was used to split direct cash and in-kind for Comcast

4. Disney's contribution is estimated as the ratio of 2014 U.S. sales to total sales multiplied by the ratio of media network sales to total sales times the ratio of cable subs/all multichannel video subs in 2014 times corporate philanthropy (Disney CSR Report—report is October 2013 to September 2014):
   - (US revenue x 2014 total revenue) x (cable product sales %) x cable sub% of total subs x corporate philanthropy
   - (36769/48813)x(15110/48813)x52.85%x86.6
   - 75.326%x30.96%x52.85%=12.325%x86.6=10.673
   - 75.326%x30.96%x52.85%=12.325%x229.1=28.24
   - 75.326%x30.96%x52.85%=12.325%x506700=62451

5. Cisco's contribution is estimated as the ratio of 2014 U.S. sales multiplied by the ratio of cable sales to total sales times the ratio of cable subs/all multichannel video subs in 2014 times corporate philanthropy (Cisco CSR Report—report is July 1, 2013 to June 30, 2014):
   - (US revenue x 2014 total revenue) x (cable product sales %) x cable sub% of total subs x corporate philanthropy
   - (10252/13783)x(10171/13783)x52.85%x82=74.38%x73.79%x52.85%=29.01%; 29.01%x 82=23.78

6. HBO and Turner's contributions are estimated using the CECP report communications industry benchmarks for 2014 (see page 6). Time Warner participated in the CECP survey, and therefore use of these benchmarks is valid. Benchmark of Total Giving as a % of Revenue = .07%:
   - TW's total revenues were $27.4 billion in 2014; of this Turner made up 38% or 10.41 billion and HBO made up 19% or 5.206 billion.
   - Turner: .07 x 10.41 = 72,884,000; the industry average ratio was used to determine direct cash and in-kind
   - HBO: .07% x 5.206= 36,442,000; 10.976% cash and 89.024% in-kind using the Turner breakdown

7. Cable One expenditures estimated using 2014 cable sales and CECP survey .07% of revenue:
   - .07% x 798,134,000 cable sales x NBC cash and in-kind split 13.5% and 86.5%.

8. C-SPAN's contribution is estimated as the 2014 C-SPAN revenue as estimated by SNL Kagan multiplied by the ratio of cable subs/all multichannel video subs in 2014 (*Economics of Basic Cable Networks*):
   - 2014 revenue x cable subs % of total subs= revenue generated from cable
   - 71 million X 52.85%=37.53 million

APPENDIX 3: DETAILED SUMMARY OF KEY RESULTS

| | Direct cash ($) | In-kind ($) | AMOUNT OF CHARITABLE GIVING | | Admin of charitable giving ($) | TOTAL GIVING ($) | Employee volunteerism # of hours |
			Employee matching gifts ($)	Employee volunteerism ($)			
MSOs	*94.0% of total subscribers (49.3 subs out of 52.5M)[9]*						
Reported Data	$32,473,169	$269,242,009	$1,865,670	$12,910,343	$1,698,449	$318,189,639	98,221
Adjusted Data	$10,962,458	$70,472,942	$3,299,568	$0	$0	$84,734,968	245,919
Derived Data	$598,421	$4,988,517	$0	$2,207,565	$0	$7,794,503	0
MSOs Total Giving	**$44,034,047**	**$344,703,469**	**$5,165,238**	**$15,117,908**	**$1,698,449**	**$410,719,111**	**344,140**
PROGs	*73.2% of total subscribers (7,012.2 subs out of 9,579.5M)[10]*						
Reported Data	$76,202,273	$263,544,244	$2,681,864	$876,660	$2,305,039	$345,610,080	79,400
Adjusted Data	$14,521,508	$53,704,492	$0	$0	$0	$68,226,000	125,810
Derived Data	$52,202,874	$125,566,126	$0	$7,327,677	$0	$185,096,677	62,451
Programmers Total Giving	**$142,926,655**	**$442,814,862**	**$2,681,864**	**$8,204,337**	**$2,305,039**	**$598,932,757**	**267,661**
VENDORS							
Reported Data	$1,100,000	$100,000	$110,000	$200,000	$0	$1,510,000	5,000
Derived Data	$0.00	$84,570,000	$207,380.00	$0	$0	$84,777,380	41,820
Vendors Total Giving	**$1,100,000**	**$84,670,000**	**$317,380**	**$200,000**	**$0**	**$86,287,380**	**46,820**
Foundations							
Reported Data	$105,104,896	$0	$1,900,000	$4,988	$0	$107,009,884	0
Derived Data	$58,264,697	$0	$0	$0	$0	$58,264,697	0
Foundations Total Giving	**$163,369,593**	**$0**	**$1,900,000**	**$4,988**	**$0**	**$165,274,581**	**0**
Total Reported	$214,880,338	$532,886,253	$6,557,534	$13,991,991	$4,003,488	$772,319,603	182,621
Total Adjusted	$25,483,966	$124,177,434	$3,299,568	$0	$0	$152,960,968	371,729
Total Derived	$111,065,992	$215,124,643	$207,380	$9,535,242	$0	$335,933,257	104,271
TOTAL GIVING	**$351,430,295**	**$872,188,331**	**$10,064,482**	**$23,527,233**	**$4,003,488**	**$1,261,213,829**	**658,621**

APPENDIX 4: PROFILES OF THE RESEARCH TEAM

Principal Researchers

Charles Patti, Ph.D.

Charles is the James M. Cox Professor of Customer Experience Management and Senior Fellow at The Cable Center (Denver, Colorado, U.S.A.) and a Professor of Marketing at the University of Denver. Dr. Patti has deep international experience through consulting and academic appointments throughout Europe, Australia, and Southeast Asia. His consulting clients have included Aetna Insurance, McDonald's, Otis Elevator, Siemens, Texas Instruments, and Philip Morris. His research covers marketing communication and CE management and his work includes journal articles, book chapters, and eight books on various aspects of marketing. Recently, Dr. Patti has been conducting research on the Customer Experience (CE) Maturity Curve, CE ROI, and CE metrics. He is a past winner of the Marketing Educator of the Year Award and is the 2013 recipient of the James Hershner Free Enterprise Award.

Ronald Rizzuto, Ph.D.

Ron is a Senior Fellow at The Cable Center and Professor of Finance at the Daniels College of Business at the University of Denver. Dr. Rizzuto has been involved with the cable industry for 30 years. He helped author the cases studies for Women In Cable Telecommunication's Management Conference and FORUMS from 1985-2006. He was inducted into Cable TV Pioneers in 2004 for his service to the cable industry. Rizzuto is an Honorary Lifetime member of WICT and received WICT's Special Accolade Award in 1988 and 1991. Dr. Rizzuto's specialty teaching and research areas include: capital expenditure analysis, mergers and acquisitions, corporate financial planning, corporate restructuring, telecommunication finance and customer experience management (CEM). Dr. Rizzuto is one of the leading authorities on the economics of municipal telecommunication overbuilds in the U.S. Dr. Rizzuto has taught the CEM finance/ operations course in the MBA program at the University of Denver. He has published numerous articles and has conducted numerous seminars in his specialty areas. He has received several teaching awards including the University of Denver's Distinguished Teaching Award and the College of Business's Cecil Puckett Teaching Award. Dr. Rizzuto has consulted with numerous companies in his career on topics related to his specialty teaching and research areas. Some of his consulting clients include the following companies: First Data Corporation, Time Warner Cable, Cox Communications, Adelphia Communications, Price Waterhouse Coopers, CableLabs, KPMG, and Liberty Global.

Maria van Dessel, Ph.D.

Maria holds a Ph.D. from the School of Advertising, Marketing and Public Relations at the Queensland University of Technology, Brisbane, Australia. Her principal research covers the general area of marketing communications with a focus on advertising. Her teaching assignments have included undergraduate and postgraduate courses in marketing, market research, ethics in marketing communications, direct marketing, contemporary issues in advertising, advertising management and foundation advertising subjects. Dr. van Dessel was a member of the team that conducted and delivered a large-scale research project to facilitate relationships between the cable industry and universities and she is currently engaged in a number of research and consulting projects involving expert witness research, content analysis of marketing communications in the business-to-business sector, and customer experience metrics for the cable industry. Her most recent publication (forthcoming in the *Journal of Marketing Communications*) involved a content analysis of advertising objectives and results. Maria is a Senior Fellow at The Cable Center and a Research Scholar in the Department of Marketing in the Daniels College of Business, University of Denver.

APPENDIX 5: REFERENCES

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