

TRAIL (B) LAZER

Bohlsen Group Leads With B Corp Status

By Matt Ottinger

EDITOR'S NOTE: Second in a series. See Page 56 for additional insights and read the first installment on corporate social responsibility in the January-February 2016 archives at www.bizvoicemagazine.com.

Vicki Bohlsen was poised to make a difference following her graduation from DePauw University. After cutting her teeth in the news industry in Indianapolis and New York, she landed back in the Hoosier state.

The Indianapolis-based public relations agency she founded six years ago, Bohlsen Group, is thriving by promoting music events, authors and more. It recently achieved coveted B Corp status – a credential reserved for companies that go beyond just earning profits by impacting their communities in a positive way.

Bohlsen recalls that consultant and B Corp Certification Specialist Kathy Pedrotti Hays of Pedrotti Hays, Inc. was working on the agency's strategic plan and advised her that Bohlsen Group was already checking off many of the required boxes.

"She noticed so much of what we did and what mattered to us was embedded in what a B certification is," Bohlsen relays. "At first, I wondered if I wanted to invest the time into it, but when we looked at the assessment it became clear that it was a benchmark for how really awesome companies operate."

B Corp certification is orchestrated by B Lab, a Pennsylvania-based not-for-profit dedicated to helping companies use business in a benevolent manner. The B Impact Assessment is given every two years.

"You need 80 points out of 200, which sounds easy, but there are so many categories and in some you may really do well, and others you may not have much responsibility over," Bohlsen qualifies. "For example, we rent so there are only so many environmental things we can do."

It prompted some adjustments in day-to-day activities as well.

"We were doing some of the things, but not the things that would get you points," Bohlsen explains. "For instance, it would say, 'Do you hire local vendors?' We do, and we did the math and realized we hire 90% local vendors – but we didn't have a local policy in our handbook. So we added it as a policy. It was a benchmark for things we needed to do more formally and in the decision making."

Being bolder

Paid volunteering hours, ongoing professional development and wellness initiatives like walking meetings and biking to work are among the benefits Bohlsen staff members receive. Work From Home Mondays are also popular, as are its recycling and sustainability efforts.

The agency also does pro bono work for local and national non-profits, including free professional development trainings and donated or discounted public relations campaigns.

"We always give 10% back to every non-profit we work with ..." Bohlsen points out, adding that throughout her career, she's "loved

working with non-profits because it made me feel like what I was doing mattered. Being able to do marketing and PR for organizations working for good was a way to give back."

The list of non-profits Bohlsen Group touches is vast. It includes Junior Achievement, the Children's and Symphonic Choirs, White River Alliance, Indiana Mother's Milk Bank, Indianapolis Public Schools Education Foundation and the Coalition for Homelessness Intervention and Prevention.

"I always knew of (Bohlsen's) commitment to giving back to the community, and it's taken several forms – pro bono or volunteer work, contributions – so to me (being a B Corp) was just a formalization of what she'd been doing," conveys Lauren Cascio, account services executive with the agency. "It was nice to see us finally put a formal name to our commitment, tell other people about it and move beyond just Bohlsen Group – to become a movement around Indianapolis."

B Lab lists Bohlsen Group as the only B Corp in Indiana (another company did earn the designation but has since moved its headquarters out of state). Others have taken note, and some will likely follow suit.

"The only challenge is because we're the only one, and everyone's trying to make sense of it," Bohlsen offers. "A lot of people



Bohlsen Group team member Courtney Alvey serves as a volunteer mentor with Girls Inc. of Greater Indianapolis in schools throughout the city.



Spencer Hotz of Bohlsen Group donates during the Pan Am Plaza building-wide blood drive.

Bohlsen B Impact Report

Certified since April 2015

Summary:	Bohlsen Score	Median Score*
Environment	7	9
Workers	31	22
Customers	21	N/A
Community	31	32
Governance	10	10
Overall B Score	100	80

Minimum eligible for certification: 80 out of 200
 *Of all businesses that have completed the B Impact Assessment. Median scores will not add up to overall

are asking for advice and if we can come talk. I want to participate, but I have to know where to draw the line between running my business and helping answer questions.”

Bohlsen will offer formal assistance to enhance philanthropic-minded business practices by hosting a series of events to help educate other businesses.

“We’re going to do a four-part series where we let not-for-profits come here (to learn about) CSR (corporate social responsibility), benefit corporations and B Corp certification,” she says, noting the first was scheduled for early March. “We’ll have a lawyer there (from Taft) in case people have questions.”

‘B’ are the champions

B Corps gather annually at a global Champions Retreat to exchange ideas, recently convening in Vermont, Colorado and California.

“We have an aspiration we could host a retreat here in the Midwest, but the challenge is you’d have to have a critical mass of B-certified organizations. Right now, they’re always in the east or west,” Pedrotti Hays shares.

The Great Lakes region is still up and coming in the world of B Corps. Illinois has 19, Michigan nine and Ohio eight, according to B Lab’s web site. California and New York, however, boast numbers in the hundreds, and the *CSR Newswire* reports there are more than 1,400 Certified B Corps in 42 countries.

Clearing confusion

Much uncertainty also remains in the public sphere about the difference between a B Corp and a benefit corporation. B Corp is a rigorous certification process, whereas a benefit corporation is a legal entity. At the beginning of this year, Indiana became the 28th state to recognize benefit corporations (following legislation that passed in 2015).

“They are related because they have the ideals of more than just profits and require a level of transparency. ... People ask if we’re going to become a benefit corporation, but we have no plans to do that,” Bohlsen clarifies.

The B Corp label has allowed the agency to engage with more clients of a similar mindset.



Drew Tharp, Muriel Cross and Heidi Harmon represent Bohlsen during Junior Achievement of Greater Indianapolis’ annual “JA in a Day” volunteer event.

“Endangered Species Chocolate (an Indianapolis-based non-profit that donates to wildlife charities) is probably the best example,” Bohlsen reflects. “We talked to them years ago about working together and it just didn’t come to pass. But after we were B-certified, we were reintroduced and they’re now a client. Then there are a lot of non-profits that say, ‘Good for you’ or they feel even more connected to us.”

She adds, however, the company has not overtly used the status as a means of self-promotion.

“Every once in a while I get an email from someone who wants to have a conversation, whether they want to hire us or they want advice. But we’re not using it as a huge marketing tool. There is publicity happening,

but it’s not the reason we became a B Corp.”

New Millennium

While walking through the agency’s downtown Indianapolis headquarters, a visitor is drawn to the youthful smiles of many Millennials – a group often credited with pushing philanthropy in the modern workplace.

“We’ll be monitoring the data (regarding the impact of the B Corp label) after a full year, but it really excites the staff,” Bohlsen remarks, adding the company employs over 30 people. “We have a lot of younger employees, and that’s something that matters to this demographic. We felt it would help with retention and hiring too. So they’re excited about it. They talk about it and are proud of it.”

It also transcends that demographic, according to Pedrotti Hays.

“CSR was met with some skepticism in the past with companies asking, ‘What’s in it for me?’ and ‘What’s the business case?’ ” she comments. “But now, I think it’s the biggest driver of why people call me because it’s the demand of the workforce. Not just Millennials, but other generations see they’re at a workplace at least 40 hours per week, and they want to see how their work is contributing beyond just what they’re doing.”

Bohlsen shares that the B Corp philosophy is now a factor in all of the agency’s decisions, especially when it chooses clients.

“We’re not curing cancer, but it’s a way every decision we make can be guided by a force for good,” she concludes. “Getting butts in seats at concerts is not saving the world, but at least we’re also giving back. That makes me proud to set a good example for my kids. And as (B Lab) notes on its web site, if everybody operated this way, how much better would the world be? If we’re doing it and it inspires somebody else to follow this path, it’s one little thing we can do.”

RESOURCES: Vicki Bohlsen and Lauren Cascio, Bohlsen Group, at www.bohlsengroup.com | Kathy Pedrotti Hays, Pedrotti Hays Inc., at www.pedrottihays.com | B Corp at www.bcorporation.net

CSR: An Early Advocate Reflects

By Tom Schuman

"It's just common sense that if two organizations can deliver like products of similar quality for the same price, the majority of shoppers will want to reward those organizations that are most responsible, most caring or who are perceived as 'being concerned with more than just making a profit.' "

The above quote is a timely analysis of today's business and cultural landscape. The words, however, were spoken and written in 1999 by Frank Walker. He is the chairman emeritus of Walker, the Indianapolis-based customer intelligence consulting firm that has been led by his family for more than 75 years.

When reminded of that quote recently, a day prior to his 81st birthday, Walker muses, "That's what I said, huh? That was a pretty good quote."

The quote and more came during a keynote speech at the annual meeting of The Society for Business Ethics. The firm, Walker Information at the time, had conducted extensive research at least five years earlier.

A 1994 nationwide survey was focused on measuring the public's perception of the term "corporate social responsibility" (CSR).

Later, the Corporate Philanthropy Index (CPI) was developed in conjunction with the Council on Foundations. Companies with higher percentages of stakeholders in the High CPI segment have demonstrated market advantages over their competitors.

Walker recalls that CSR, like today, was a popular term 20-plus years ago. Convincing employers of its importance was another story.

"It comes back to economic decisions," Walker reflects. "When I would go to companies and say, 'Are you ethical, the CEO would say, 'Yes, we follow the law.' I'm saying, 'It isn't enough to follow the law. It's something beyond that.' So they would come back, 'I don't need this because we don't break the law and in my mind that's ethics.'"

"And it was a hard sell to get them to connect. It takes money to measure (ethics, giving back and the resulting impacts)," he continues. "A lot of CEOs will give lip service to the fact they really are concerned about employee happiness. But they'll spend a lot more money researching how to sell to more customers than trying to keep employees happy."

For the business leaders focused on

following the law, those were decisions between right and wrong. "Ethical dilemmas," Walker emphasizes, "are where it's right vs. right. We face that in business all the time."

Not convinced a company's actions and public opinion matters? In an interesting corporate character rating study from 1994, the four top-rated airlines are still in business today. The bottom four have disappeared as part of mergers.

Showing the way

The Walker firm tried to lead by example. The company issued its first ethics code in the 1970s, conducted training (a chapter in a 1980s business book was dedicated to the Walker ethics program) and appointed an ethics officer in 1997.

In that 1999 speech, Walker noted measuring the attitudes and opinions of associates in the two prior years. The percentage of employees who thought the company was highly ethical and those who believed they personally fit well with that ethical culture both increased dramatically.

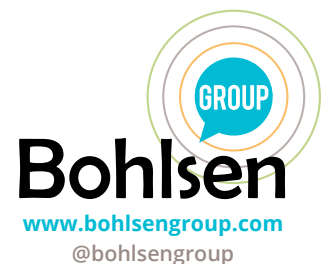
Walker attributed his early focus on this area to the work of Rushworth Kidder, a

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journalist who went on to start the Global Institute for Ethics. At an annual retreat, at least one company officer was concerned when learning a full morning was going to be spent on ethics.

"It turned out the hotel people were knocking on the door at 12:30 p.m. saying our food was getting cold next door. Our group was so taken with what Rushworth was saying."

Evolving atmosphere

Walker remains passionate about the topics of CSR, ethics and employee loyalty. In 1999, he spoke about a bumper sticker – "Change is good. You go first." – that could still apply today in many instances. But he tells now of his granddaughter who returned to school to earn her master's degree and wants to work in a corporation's CSR department.

"That wouldn't have happened 15 years ago. Then there's the amount of research being turned out. All these things have grown over the years. We're still not there in terms of lots of companies approaching it in a real sophisticated manner, but it is changing."

Here is the conclusion of Walker's 1999 speech: "Corporate character and ethics are helping to drive the reputation of organizations. The importance of this is now only beginning to be realized. The future can be bright for those of us involved in this movement. We have the opportunity to participate in what will be a significant change in the way organizations do business and measure performance."

His thoughts today upon hearing those words again:

"Do you think that the good guys win? I think they get put down now and then, but they do (win). Do you feel good going out in this



Computer printouts were common in the days when Frank Walker and his company were first talking about corporate social responsibility.

community and saying, 'I work for Walker.' Do you have to be embarrassed when you say who you work for? We'll have setbacks; we'll have people who made millions and they're bad guys. Some of this takes so long, but we can't become discouraged. I don't see why we can't do both – be profitable and help solve problems."

RESOURCE: Frank Walker, Walker, at www.walkerinfo.com

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