

BLACKBIRD

PHILANTHROPY ADVISORS

Amplifying Altruism

How a seasoned insurance brokerage firm unlocked the power of impactful philanthropy

Discover how Blackbird Philanthropy Advisors helped a fifth-generation, family-owned enterprise quantify and share their community impact.

OVERVIEW

THE CHALLENGE

- Walsh Duffield already participated in philanthropic activities but needed help quantifying and communicating them.
- The company faced steep competition in a market where clients seek alignment with value-driven partners.
- Walsh Duffield aimed to engage employees more effectively in their philanthropic initiatives.

THE SOLUTION

- Blackbird Philanthropy Advisors were brought on as strategic impact partners.
- Blackbird conducted a comprehensive philanthropy audit, helping Walsh Duffield quantify their charitable actions.
- The Blackbird team also delivered an impact report and marketing content to help the company communicate and quantify their philanthropic efforts both internally and externally.

THE RESULTS

- Employee involvement in philanthropic opportunities skyrocketed, enhancing the company culture.
- Walsh Duffield secured new business opportunities due to their compelling philanthropic storytelling.
- The impact report provided became a powerful tool for demonstrating their commitment to the community and explaining their values.



CASE STUDY
SPOTLIGHT ON



Walsh Duffield
BUFFALO, NEW YORK

ABOUT WALSH DUFFIELD

Walsh Duffield is a respected, well-established insurance brokerage firm founded in 1860 in the heart of Buffalo, NY. The company has a rich history, prominent influence in the community, and prides itself on being a fifth-generation, family-owned business. With over 100 employees and three locations, Walsh Duffield offers a range of insurance products and services, including property and employee benefits. Their core strength lies in building personal connections with clients and a deep commitment to serving their community, an impact they can see in a small community like Buffalo.

THE POWER OF PHILANTHROPY

Philanthropy has always been at the heart of Walsh Duffield's identity. Their commitment to giving back to their community defines their company culture and serves as an essential signal to attract other like-minded clients and employees. In regards to company culture, CEO Ted Walsh states, "Many of our new associates want to work for an organization that cares about their community and gives back." The dedication of Walsh Duffield goes beyond just writing checks. It's about boots-on-the-ground effort and impact.

THE CHALLENGE: STORIES LEFT UNTOLD



Despite a long history of charitable efforts, Walsh Duffield struggled to quantify the extent of their philanthropic endeavors. They needed a way to measure and communicate their contributions effectively. In a time and an industry where clients are increasingly seeking alignment with the organizations with whom they partner, Walsh Duffield faced competition from other insurance firms, needing a way to stand out in the market.

In addition to these challenges, the company needed a way to engage its employees in philanthropy. While they had a dedicated group of “Change Agents” within the company, they needed a better way to get their team excited and empowered when it came to philanthropic activities and a way to align their interests with Walsh Duffield’s charitable initiatives. Ted Walsh emphasized the importance of addressing these challenges stating,

***“It’s not a focus on what we do;
it’s that we care. It’s walking the walk.”***

—Ted Walsh, CEO of Walsh Duffield

As a company with longstanding volunteer relationships with the United Way, Child and Family Services, and FeedMoreWNY, Walsh Duffield was no stranger to philanthropic endeavors but needed a way to tell the story of their contributions authentically and effectively.

THE SOLUTION: CHANGING THE NARRATIVE

In pursuing impactful storytelling and increased employee involvement, Walsh Duffield sought the help of Blackbird Philanthropy Advisors. Immediately, Blackbird got to work, offering them a tailored solution.

Blackbird first addressed the state of Walsh Duffield with an in-depth audit of their existing philanthropic activities. This audit quantified their contributions over the years and painted a clear picture of their charitable impact.

After conducting the audit, Blackbird then created an impact report. This report detailed Walsh Duffield’s philanthropic journey, becoming a powerful tool for communicating their values and their impact on clients, employees, and the public. Walsh highlighted the immediate significance and clear business value of the impact report, stating:

“A prospective client wanted to know who they were compatible with, who shared their [values]. That was what they were most interested in and ultimately what made them call us back two hours later saying that they wanted to work with us.”



Blackbird Philanthropy Advisors also provided a marketing content package for Walsh Duffield that contained social media posts, e-mail announcements, press releases, and website content—all tools that supplemented their philanthropic story through design. Walsh Duffield Marketing Director Lindsay B. Hayes reflected on her team's experience within the organization, stating,

“Working with Blackbird was easy...

Caitlin took charge and made the process smooth. We knew that we had a culture that encouraged volunteering but wanted to appropriately tell the story.”



THE RESULT: CLEAR DEDICATION FOR THE GREATER GOOD

New Partnership Opportunities

Walsh Duffield's enriched approach to philanthropy, amplified by their partnership with Blackbird Philanthropy Advisors, opened the doors to exciting new business opportunities. Their philanthropic storytelling was now finely tuned and quantified, playing a pivotal role in attracting clients who sought the same values. The impact report was a tangible representation of their dedication to making a difference. It became a distinct factor that resonated deeply with clients in search of partners who shared their commitment to the community. As a result, Walsh Duffield found themselves not only securing new business but also forging meaningful connections with clients who appreciated their value-driven approach.

Improved Employee Engagement

With Blackbird's guidance, Walsh Duffield achieved more than just quantification—they revitalized their company culture. Employees within the organization began to feel a heightened connection to the company's philanthropic endeavors. This newfound sense of participation extended beyond daily operations as employees saw their contributions directly impacting the community they were a part of.

The shift in employee engagement was a transformative force that set Walsh Duffield apart from competitors and allowed their team to feel less like employees and more like advocates. In reference to the impact report, Hayes noted its role in her trans development, stating,

“Our employees and sales team are very proud. We feel like this is a big differentiator for our agency and have seen other 'like-minded' organizations wanting to work with us because of this. The impact report helps show the value of working with a true community partner.”—Lindsay B. Hayes, Marketing Director

Demonstrating Dedication

The impact report, a key tool from the collaboration with Blackbird, served as an extremely powerful way for Walsh Duffield to effectively demonstrate their unwavering commitment to their community and their core values. The report allowed them to showcase their efforts and impact across various charitable causes while displaying their brand ethos. It allowed them to communicate their dedication to the greater good and provide substantial evidence of their philanthropic involvement. Through this report, Walsh Duffield can illustrate that their actions speak louder than words, solidifying their position that people do come first.

“This is going to help us in planning for the future, allowing us to be more strategic about our giving.”

—Lindsay B. Hayes, Marketing Director

A NEW CHAPTER FOR PHILANTHROPY

With the help of Blackbird’s extensive knowledge and actionable philanthropic strategies, Walsh Duffield can continue their legacy of community service and involvement, widening their impact and inspiring excitement to do good and do it more.

“Before, we knew what we were doing, now we know how to talk about it.”

—Ted Walsh, CEO of Walsh Duffield



Partner with Blackbird Philanthropy advisors to forge your strategic path toward changing the world

Blackbird Philanthropy Advisors helps successful businesses maximize value from their community investments.

We are a team of specialists dedicated to enhancing employee engagement, bolstering market positioning, and creating a positive societal impact through strategic philanthropic investments.

We measure ROI through social impact studies based on client giving priorities, goals, and growth projections for businesses and family philanthropists. We work closely with corporate leaders to develop a clear philanthropy path to ensure they're stretching their dollars and making the biggest impact possible.

Many philanthropists wonder if their donations work, Blackbird is here to make sure of it.



Social Impact Services Provided by Blackbird Philanthropy Advisors

- Philanthropy Planning
- Employee Engagement
- Philanthropy Audits
- Market Impact Research
- Cause Marketing
- Social Impact Storytelling Content
- Philanthropy Management
- Impact Assessments
- Nonprofit Relationship Management
- Impact Reports and Annual Reports

Contact Us to Get Started!

Website: www.blackbirdadvisors.org

Email: info@blackbirdadvisors.org

Voicemail: 574-228-4079

Office: 1251 N. Eddy St., Suite 200 South Bend, IN 46617

Team: 2 Employees; 5 Consultants

Service Area: Services Provided Globally



"I started Blackbird Philanthropy Advisors in 2017 after hearing so many generous people feeling unsure if their donations were truly making a difference. I set out to make sure of it. Most businesses don't have the staff to manage their community investments professionally, we're here to do it for them."

-Caitlin Smith, Founder and Managing Director of Blackbird