



## Fulfilling Our Commitment to Clients, Communities, and Colleagues

Across all aspects of our firm, we are uplifting and inspiring best practices in philanthropy, employee engagement, governance, and the environment reflective of our values and our commitment to stewardship and sustainability.

Our commitment to corporate social responsibility informs everything we do at William Blair—from how we invest on behalf of our clients to how we invest in our people and communities. By aligning our business practices with our values, we seek to make a positive impact by supporting organizations that are addressing the most pressing issues facing our communities, creating a workplace culture that fosters diversity and inclusion, and being responsible stewards of the resources entrusted to us.

This dedication to community engagement and corporate citizenship is part of the heritage of our founders and we proudly continue today. We are continually looking for ways to build on this legacy and make it more relevant and meaningful for the evolving challenges of today's social, environmental, and business landscape.

## CORPORATE SOCIAL RESPONSIBILITY

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### Philanthropy: Investing in Our Community

We believe that investments in our community yield the greatest return. That's why we are committed to being a long-term partner to the communities in which we live and work. The mission of the William Blair & Company Foundation is to inspire the next generation of philanthropists and 100% of our philanthropy is inspired by our employees.

Each year our colleagues contribute to hundreds of charitable organizations through their time, investments, and leadership. We seek to empower their philanthropic visions by providing up to \$11,500 per employee in annual matching gifts and offering one paid day off for volunteer work, in addition to firm-sponsored events and programs. Hundreds of employees serve in leadership roles on nonprofit committees and boards and nearly half of our employees participate in our philanthropic programs in some capacity.

In 2018, William Blair supported more than 800 charitable organizations through donations totaling nearly \$5 million through the firm, our foundation, and employee contributions.

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Building a culture that values diversity and empowers our people isn't just good for employee morale; it's essential to our company's growth and continued success.

### Community Partner Spotlight: MAPSCorps

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MAPSCorps provides students with summer jobs to collect and analyze community asset information, build STEM skills, and ultimately provide data to NowPow, an IT platform that matches people with healthcare and social service resources. William Blair is working with MAPSCorps to develop an alumni program and expand mapping to seven more Chicago neighborhoods by 2020.



## CORPORATE SOCIAL RESPONSIBILITY

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The hallmark of our giving is our Community Partners program, through which we provide catalytic financial and volunteer support to organizations that are addressing issues related to education, healthcare, social services, and youth development around the world. Our current Community Partners in the United States are MAPSCorps and MetroSquash (Chicago); Reading Partners (New York); Real Options for City Kids (San Francisco); Nativity Prep School, Children's Melanoma Prevention Foundation, and New England Homes for the Deaf (Boston). Our international Community Partners include Hands On and Wrap Up London, and the Anne Frank Educational Centre in Frankfurt. Every two years employees nominate organizations for the firm's Community Partner grants and since its inception we have invested nearly \$2 million through this grants program.

### Workplace: A Culture That Empowers

Diversification has value beyond investment portfolios. In all aspects of our business, we believe that diversity of skills, experience, capabilities, and perspectives is essential for the innovative thinking that our clients demand from us.

We are committed to creating a culture based on diversity and inclusion. In addition, we are building a workplace environment that gives our people the tools, resources, and opportunities to unlock their potential and fulfill their personal missions. These efforts aren't just good for employee morale; they are fundamental to our company's growth and continued success.

To facilitate a community of diverse perspectives and backgrounds, we have implemented a targeted talent strategy designed to (1) increase the frequency, transparency, and relevance of conversations between employees and managers; (2) create clear firmwide guidelines for what is expected of our employees; (3) support ongoing learning and development opportunities; and (4) foster a culture in which all employees feel included in a community that embraces differences and values, and respects each individual.

### A Great Place to Work

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William Blair was named one of *Pensions & Investments*' Best Places to Work in Money Management six of the last seven years; one of the *Chicago Tribune*'s Best Places to Work in Chicago for the past nine years; and one of *Fortune*'s 30 Best Workplaces in Financial Services and Insurance in 2016.



## CORPORATE SOCIAL RESPONSIBILITY

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As part of these efforts, we have also created three business resource groups—the Women’s Alliance, the Veterans’ Alliance, and the Pride Alliance. The business resource groups create solutions and support efforts around recruitment, retention, awareness, and community engagement of team members as well as the firm’s efforts in diversity and inclusion and community engagement.

### **Governance: Building on a Strong Foundation**

The sustainability of our business pays valuable dividends for our clients, our employees, and our community partners. The independence that comes with being an employee-owned firm, along with our strong balance sheet and diversified business model, allows us to remain steadfastly focused on our clients’ success across market cycles. This stability is enhanced by the consistency of our leadership. We have had just five CEOs since our founding, and current CEO John Ettelson has served in the role since 2004. These foundational elements of our corporate structure are supported by robust policies and practices related to compliance training and business continuity.

### **Sustainability: Prioritizing the Environment**

Sustainability is foundational to our business values as well as how we do business. Environmental sustainability is a priority for William Blair, and we are identifying and executing on ways we can have an innovative and important impact. Examples of this include our LEED-certified buildings, most recently our new global headquarters, which was built and designed to LEED gold standards. Whenever possible, we choose green materials and solutions for our buildings, such as our headquarters’ Lutron lighting system that automatically dims when daylight is plentiful. In addition, our energy provider supplies us with 10% wind power. Our U.S. offices are rolling out composting programs to minimize our landfill trash stream, and we e-cycle or donate all of our outdated technology items. [wb](#)

### **Benchmarking for Success**

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As part of our effort to continually improve the effectiveness of our sustainability practices, we engaged a premier accounting and auditing firm to analyze how our efforts compare across the financial services industry. The benchmarking report will highlight material ESG factors and provide best practices for engaging employees and monitoring performance.





# Our Philanthropy: By the Numbers



800+

Charitable organizations supported in 2018



Nearly \$5M

Amount the firm, its foundation, and employees donated through our charitable programs in 2018



\$11,500

Amount each colleague may receive in employee and board matching gifts

## CONCLUSION

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### Identify the Purpose of Your Capital

At William Blair, we believe that all capital has purpose and that all capital can make an impact. Whether you invest in one of our proprietary strategies, draw insights from our equity research, work with our investment bank for capital-raising and advisory solutions, or entrust our wealth advisors with your personal capital, we are committed to delivering ideas and solutions to help you fulfill the purpose of your capital.

Whatever your vision is for your capital, we invite you to begin a dialogue with William Blair to explore ways that those values can be expressed with your capital and in all aspects of your financial life. [WB](#)

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