

Morgan Stanley

Community Affairs

Community Affairs manages Morgan Stanley's core philanthropic outreach. Our responsibilities include grant making, employee community engagement, oversight of the Morgan Stanley Foundation and our signature program, the Morgan Stanley Global Alliance for Children's Health. Among the key priorities for the Firm and the Foundation are children's health, diversity education, and encouragement and support of Morgan Stanley employees' community involvement.

The Firm's Community Affairs programs are complemented by several other local U.S. and international initiatives, including local giving by business units directly throughout the world, the Morgan Stanley International Foundation based in London, the Inspire Program in Japan, and a growing Community Affairs program across the Asia Pacific region.

In total, Morgan Stanley's worldwide philanthropy provided over \$76 million to nonprofit organizations in 2011. The overview below provides a description of our US programs, as well as specific information regarding funding requests and associated requirements and restrictions.

Overview of Programs

Volunteering

To encourage employee volunteering, Morgan Stanley offers a suite of engagement opportunities for our employees. Our programs facilitate team and individual engagement through **Global Volunteer Month**, held each June, as well as our **Year-Round Volunteer Program**, which connects employees throughout the year to strategic nonprofit Firm partners.

We are dedicated to making a lasting impact on our communities with our strongest asset – our talent. Through our annual **Morgan Stanley Strategy Challenge**, we create teams of Morgan Stanley employees who work with nonprofits over an eight-week period to analyze and solve an important strategic issue for the organization. Due to the outstanding results of the program's first three years, Morgan Stanley has committed to deliver more than \$2 million in pro bono services by July 2013 and is an active supporter of the [A Billion + Change Campaign](#).

Volunteer Incentive Program

In addition to Firm-sponsored opportunities, the Morgan Stanley Foundation recognizes and supports employee volunteer efforts and fosters relationships with our local communities by offering grants through the Volunteer Incentive Program ("VIP"). The VIP supports local health and social service charities and programs where Firm employees are directly engaged through financial grants ranging in size from \$500 to \$2,000. *Applications for VIP grants must be initiated by the employee involved.*

Workplace Giving

Morgan Stanley's generous employees give annually through the Annual Appeal, the Firm's employee charitable giving campaign. In 2011, employees contributed more than \$30 million to benefit more than 10,000 local nonprofit organizations and the core programs of the Morgan Stanley Foundation.

Charitable Spending Accounts

To increase the reach and impact of our employees' giving, Morgan Stanley offers a unique initiative: Charitable Spending Accounts. Employees who contribute through the Annual Appeal are eligible to receive up to \$4,000 in matched corporate funds that they can direct to U.S. charities. Unlike traditional 'matching gifts' programs, Charitable Spending Accounts offer employees the option of directing corporate match dollars towards all U.S. charities, and not only those they have previously funded. Participating employees may make as many allocations with their accounts as they would like during each year.

Grantmaking

Through the Morgan Stanley Foundation and direct corporate contributions, Morgan Stanley Community Affairs provides roughly \$20 million annually to:

- Create and deliver excellence in children’s healthcare through the **Morgan Stanley Global Alliance for Children’s Health**
- Invest in students to create access and opportunity in the financial services sector for members of underserved communities
- Encourage, recognize and reward Morgan Stanley employee community engagement

Morgan Stanley Global Alliance for Children’s Health

We invest in innovations in pediatric care, so that more children can get the healthy start they need for consistent and meaningful achievement in life. Our Alliance is focused particularly on preventable death and disease in the youngest children and supports leading centers of pediatric excellence and other prominent children's outreach groups. Our funding is divided into three segments: creating centers of excellence to foster innovation, thought leadership and direct care for underserved children. The flagship of our efforts is our 40-year relationship with the Morgan Stanley Children's Hospital of New York-Presbyterian. More recently, we expanded our outreach to other international hospital partners, including the Great Ormond Street Hospital in London and Beijing Children's Hospital. We also focus on providing support to children suffering from malnutrition in the United States and abroad. In addition to our Step Up to the Plate campaign launched in 2009 and lead partnership with Feeding America, Morgan Stanley is the first major corporate supporter of Grow Clinics, specialty operations that target families with children suffering from medical complications associated with malnourishment primarily due to poverty.

Scholarships

Morgan Stanley has a long-standing commitment to investing in students and faculty in minority and underserved communities. We focus on career development through scholarships, fellowships and internships at both the undergraduate and graduate level. We give priority to programs serving diverse student populations and to those that offer access to opportunities in the financial services sector. Our programs include the ***Richard B. Fisher Scholars Program***, a college scholarship, as well as internship initiatives for minorities.

Funding Guidelines and Restrictions

Applications

Morgan Stanley initiates the vast majority of our grants. Therefore, Community Affairs does not accept unsolicited proposals. If you think that your organization is a good match for the Global Alliance for Children's Health or scholarship programs described above, and falls within the geographic scope and other restrictions set forth below, please send no longer than a two-page letter of inquiry to the address below with the following information:

- Program description, including mission, goals and numbers served
- Measurement strategies
- Geographic scope

If your organization is being considered for funding, you will be asked to provide additional information.

Geographic Scope

Morgan Stanley Community Affairs grants and programs, with few exceptions, benefit U.S.-based charities. Our funding is limited to national initiatives and those serving multiple cities across the United States. Our support of local initiatives (serving only one metropolitan area or state) is restricted to those organizations for which our employees are active and ongoing volunteers. Local grants are therefore coordinated solely through our VIP; charities cannot apply directly for VIP grants.

Restrictions

Morgan Stanley Community Affairs does not make contributions that fall within the following categories:

- Organizations without 501(c)(3) exemption or other charitable status
- Political causes, candidates, campaigns or lobbying programs
- Capital and endowment campaigns outside of our hospital partners
- Grants to individuals
- Special events including dinners, walks, runs and golf events
- Religious, fraternal or professional sports organizations
- Documentaries, individual performing arts groups or productions

**MORGAN STANLEY COMMUNITY AFFAIRS
1633 BROADWAY, 25TH FLOOR
NEW YORK, NEW YORK 10019
212-537-1555
whatadifference@morganstanley.com**