

Businesses worldwide are encouraging and enabling their most important asset – their people – to commit their time, skills and energy as volunteers in the community.

Why do they do it? What is the return on investment for companies, workers and community? Why and how is it becoming a strategic asset for businesses in every region of the world?

This book, based on the first global research on corporate volunteering, answers these questions while exploring in depth the history, “inspiring practices,” innovations and challenges that are defining the field as a powerful force for change.



Fundación Telefónica

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Book

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# THE BIG TENT Corporate Volunteering in the Global Age

Kenn Allen

Fundación Telefónica



## ABOUT THE AUTHOR

Dr. Kenn Allen is president of the Civil Society Consulting Group LLC, a global consulting practice that works with leaders in business, government and NGOs to “unleash the power of people to change the world.” In 2009-2011 he served as director of the Global Corporate Volunteering Research Project, the first truly global study of its kind. Thirty years ago he led the first systematic research that defined “corporate volunteering” as a field of activity. His doctoral research was on the role and meaning of community service in the lives of CEOs of major corporations.

He is a former World President of the International Association for Volunteer Effort (IAVE) and served in senior executive leadership roles at the Points of Light Foundation and the National Center for Voluntary Action in the United States. He has consulted in over 30 countries, in every region of the world, and is the author of numerous books, studies and articles. He received his doctorate in Human Resource Development from George Washington University in Washington DC where he lives.

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Ariel

Fundación Telefónica



International Association for Volunteer Effort

Telefónica

# **THE BIG TENT**

## **Corporate Volunteering in the Global Age**

*Ariel*

COLECCIÓN  
**Fundación Telefónica**

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# **THE BIG TENT**

## **Corporate Volunteering in the Global Age**

Kenn Allen, Ed.D

*Ariel*

COLECCIÓN  
**Fundación Telefónica**



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# Foreword

When analysing what a company should do in order to set up a quality corporate volunteering programme Kenn Allen suggests it is much more adequate to talk about “inspiring practices” than of “good practices.” Not all formulas work for all companies and it is up to each company to figure out what works best taking into account its social environment, the profile of its employees, the company structure and even the business it is in. Our experience working with many entities and other companies in corporate volunteering inclines us to agree with this statement. Nevertheless, we wish to share some of the practices which have guided us in making it a programme we are proud of.

First and foremost, in Telefónica, the corporate volunteering programme is managed through the Telefónica Foundation. In doing so, we do not only take advantage of the expertise the Foundation has acquired in the management of social projects but we also make a statement: the primary objective of a corporate volunteering programme must be to contribute to the needs of the communities it is part of. We thus make sure that, without disregard of the many fringe benefits such a programme may bring to the company in terms of managing the corporate culture or increasing the employee's pride of belonging, the main point of focus is on social issues.

Secondly, Telefónica corporate volunteering is part of company culture, and as such we aim at offering all its employees the opportunity to get involved. The programme is therefore managed from a global perspective and resources are dedicated to making sure employees from all over the world can become Telefónica Volunteers. This does not mean we believe in implementing the same projects everywhere in the world. On the contrary, in each country the programme is implemented taking into account local circumstances, Telefónica projects already in place (i.e. the Proniño programme aimed at contributing to the reduction of child labour in Latin America, or the Think Big programme which supports young people in Europe who wish to improve their communities or society) as well as employee preferences.

Thirdly, we take great care in choosing and forging long term relationships with the social organizations we work with around the world. These are organisations that are able to maximise the added value corporate volunteering can offer them, thus ensuring this potentially valuable resource is taken into account at the inception stage of a new social project.

Finally, a corporate volunteering programme in order to be successful must receive the support of management at executive level. It is all very well for a programme to receive wide support from employees, but if the Executive Committee does not truly believe in

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promoting this activity as beneficial to the company, its employees and the communities it is part of, it will be very difficult to get a programme off the ground. In Telefónica, all social projects implemented by the Telefónica Foundation and the corporate volunteering programme in particular, are strongly and publicly endorsed by the Executive Committee of the company. This outspoken commitment has a domino effect on all levels within the company and is an illustration of how the programme is deeply rooted in Telefónica corporate culture.

As avid promoters of a corporate volunteering programme, in the Telefónica Foundation we feel we have a responsibility to share our experience and convictions with other companies and social entities alike. As such, we do not only aim at improving the projects we manage, but we also feel we must contribute to generating knowledge about the social issues we work on. In the field of corporate volunteering we are active participants in many of the relevant international networks aimed at sharing knowledge and “inspiring practices,” such as the Global Corporate Volunteer Council (GCVC) and Voluntare, as well as many local organizations which work towards the same goal.

It is in this context that we are extremely proud to be part of the generation of this very valuable work by international expert Kenn Allen on the state of corporate volunteering in a global world. We hope it will inspire and help many corporations to take the first steps toward incorporating corporate volunteering initiatives as part of the many ways in which they contribute to the societies they are a part of.

**César Alierta Izuel**

Chairman & CEO, Telefónica, S.A.  
President of Fundación Telefónica

# Foreword

In 2009, the International Association for Volunteer Effort (IAVE) and the member companies of its Global Corporate Volunteer Council (GCVC) – launched the Global Corporate Volunteering Research Project as one of our contributions to the celebration of the 10<sup>th</sup> anniversary of the United Nations International Year of Volunteers.

The project was the first to examine corporate volunteering at a global level. Its purpose was to create new knowledge to help businesses expand and strengthen their volunteer efforts – globally, nationally and locally. There were two primary components of the project:

- The State of Health Study, designed to “take the temperature” of corporate volunteering globally and regionally as well as to examine the trends, challenges and opportunities that are shaping it; and,
- The Global Companies Study, built on in-person and telephone interviews, focused on how 48 global companies organize and manage their volunteer efforts.

The final report of this project was published in June 2011 and is available online at [www.gcvcresearch.org](http://www.gcvcresearch.org).

IAVE is the only organization that exists for the sole purpose of promoting, supporting and celebrating volunteering in all of the myriad of ways it occurs throughout the world. Its network of members – individuals, NGOs and businesses – come from 70 countries, across every region of the world.

The Global Corporate Volunteer Council is a network of global companies that have come together to learn from and support one another and, together, to contribute to the global development of corporate volunteering.

The book you now are holding was made possible through the generous support of Fundación Telefónica which was also a sponsor of the research project. It was written by Kenn Allen, director of the research project, who has been deeply involved in the development of corporate volunteering throughout the world for over 30 years.

While the book is derived from the research project, it goes well beyond it, drawing in research and examples from a wide variety of sources, and melding it together to present a coherent story about the development of corporate volunteering, its current practice, the challenges it faces and its future.

## THE BIG TENT. Corporate Volunteering in the Global Age

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There can be no doubt that corporate volunteering, no matter how it is defined and executed, is one of the most significant volunteer assets available to help address our most important human, social, economic and environmental challenges. Businesses are demonstrating their willingness to commit their most important asset, their people, to this type of work because they are aware that their volunteers provide both expertise and “people power” to communities worldwide.

But corporate volunteering also needs to be understood in the context of how it benefits the workers who volunteer and the companies that organize and support their work and of the unique opportunities and challenges it presents to companies and their NGO partners.

Throughout this book, the argument is made that there is a gap between what companies profess is their belief in the value of corporate volunteering and the investment they make to ensure that value is maximized.

This is not a how-to manual, although there are plenty of useful tips for people charged with managing corporate volunteer programs. It is not an academic tome; indeed, it is written in an informal way so as to make it accessible to a broad audience, nor is it meant to be polemic, designed to stir controversy.

Rather, as Kenn describes in Chapter 1, the book is an opportunity to “create the moment and stimulate the dialogue.” It is a beginning for reflection and discussion as well as a comprehensive view of what we now think of as corporate volunteering.

As this book challenges us to do, we encourage thoughtful consideration of the issues it raises.

We are deeply grateful to Fundación Telefónica for conceiving this book and for entrusting its creation to IAVE, GCVV and Kenn.

### **Kang-Hyun Lee, Ph.D**

World President  
IAVE

### **Sam Santiago**

Chair, Global Corporate Volunteer Council  
Director of American Giving  
American Airlines



International Association for Volunteer Effort



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With gratitude for their support...

... to Fundación Telefónica – especially to Alejandro Diaz Garreta, Geert Paemen and Lucila Ballarino – for creating the idea for the book, making it possible for me to write the book and demonstrating unending patience as it moved to completion...

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... to my colleagues, Monica Galiano and Sarah Hayes, who were critical to the success of the research project, from planning to data collection to analysis of the data, conceptualization of the conclusions and their presentation and preparation of the final report and its introduction at the IAVE World Volunteer Conference in Singapore in January 2011 and to Monica for the additional research she undertook in Latin America that expanded our knowledge and created a model for future regional research...

... to the 12 companies that not only provided the financial support that made the research project possible but were also generous with their time, their insights and their feedback throughout the project...

... to the 48 global companies that contributed their time, experience and knowledge as participants in the research project and the 26 “cooperating organizations” that provided counsel, connections and knowledge...

... to Maureen Shea, my wife, not only for her patience above and beyond the call but also for her skillful review and editing of the manuscript and to Brody the Dog who was a faithful companion throughout.

All of them were essential to the development of this book. None bear responsibility for its contents – that is mine alone. But hopefully all will be pleased with the result.

**Kenn Allen**  
Washington DC  
September 2011



# Laying the Foundation

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# Chapter 1

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## The Origins of the Book

When our friends at Fundación Telefónica invited me to write a book on corporate volunteering, they said they would like it to be both “useful” and “practical,” a book that “will not be left on a shelf to gather dust.”

This implied, to me, that it should also be both “interesting” and “accessible” to a far reaching audience not only of businesses but of other employers, NGOs and the broad panoply of folks – government officials, consultants, trainers, academics – who connect with “corporate volunteering.”

In his memorial to the late Robert Payton, a pioneer in education for and about philanthropy, Leslie Lenkowsky (2011) at Indiana University wrote that Payton believed that “practice... was overwhelming theory” and that it was reducing “education to training.”

Something similar might well be said of corporate volunteering – that practice has overwhelmed critical thought.

Thus, I would add “challenging” to the list of desired characteristics. It is simply not enough to focus on the “what” and the “how.” We also must be sensitive to the “why” and we must create a framework within which we can view and understand both the concepts and the practice, not necessarily with unbridled enthusiasm but critically.

Volunteering, no matter the setting in which it is done, is not a value-free activity. It embodies a world view, a spiritual dimension (although not necessarily religious), often a political dimension (many times not acknowledged), a way of thinking about people and their capacity to bring change, a set of beliefs about the meaning and value of helping.

At its best, volunteering is a way to affect how power is distributed in society. It is not about maintaining dependencies but about enabling those with less power to build the capacity and to have the opportunities to exert control over their own lives and destinies.

People responsible for leading and managing corporate volunteer efforts and for building volunteer-focused partnerships in their communities cannot succeed unless they are open to thinking through the implications of the work they are doing – the implications for those they seek to serve and for those who are volunteering as well as for the company for whom they work.

So how do we meet the potentially conflicting demands for this book – useful, practical, interesting, accessible, challenging?

British political philosopher Michael Oakeshott once suggested that the purpose of professional education is *to create the moment and stimulate the dialogue*.

That has always seemed to me an apt description for the work of those of us engaged in professional development and organizational development. It recognizes that in questioning, challenging, reflecting, we come to greater awareness, greater recognition not of *an* answer but of the *multitude* of possible answers, and gain greater sensitivity to the meaning of what we are doing.

In one of the early courses in my own doctoral studies, a professor made it clear that we were there not to receive answers but to learn how to ask the right questions.

Although those for whom this book is intended are not doctoral students, neither are they “beginners” in the field. Indeed, the only true beginners in this field are those who are in the first days of their introduction to it. Upon having entered into the work, everything – all thought, all planning, all action – needs to be at an “advanced” level.

In this book we will strive to follow Oakeshott's suggestion, to “create the moment” – a time away from the pressures of immediate day-to-day work – and to “stimulate the dialogue” of reflection and thought about the why, the what and the how.

Like any book, this is a reflection of its moment in time. The world is moving on even as the book is being written. There is constant change, growth, development. A great example disappears as quickly as it arrived. Today's barriers give way to tomorrow's innovation. There is always “the next greatest thing” just around the corner.

Neither a “how to” manual nor academic research, this book is, instead, a proposed approach to how to think about corporate volunteering and its place in the world, a guide to potential actions that will strengthen the work of individual companies and the field as a whole.

There are, then, three purposes for this book:

- To establish a conceptual framework for corporate volunteering as a global activity;
- To share knowledge that will help companies do more and do it better; help companies and NGOs build stronger partnerships; help “observers” better understand, appreciate and contribute to the development of corporate volunteering; and,
- To identify and discuss critical issues that are shaping corporate volunteering, the implications of those issues and possible responses.

And, along the way, we need to make sure it is useful, practical, interesting, and challenging.

Ultimately, of course, making this or any other book useful is as much the responsibility of the readers as it is of the author. Your challenge is to creatively utilize what is here –

to think, not to follow directions; to draw out and consider the implications for your own work; to adapt and adopt as appropriate.

### About “Corporate Volunteering”

“What’s in a name? That which we call a rose by any other name would smell as sweet...” Or so wrote Shakespeare (circa 1597) in *Romeo and Juliet* over 400 years ago.

Put another way, what matters is what something *is*, not what it is called.

So what *is* corporate volunteering, at least as we are using the term in this book?

It is not a precise term. But neither are “employee volunteering” or “workplace volunteering” or “employer-supported volunteering” or any of the other variations that have been used over the years.

Indeed, as we will explore in Chapter 16, none of these may be the right terms and even the use of the word “volunteer” may be inappropriate depending on the nature of the activities undertaken.

But, whether accurate or not, it is a term of art that is broadly understood to refer, in the definition that has always given me the greatest comfort, to:

any effort by any employer to encourage and support volunteering in the community by its employees.

Thus, it is not limited to whatever image the word “corporate” conjures or even to for-profit workplaces at all. Institutional promotion and support of volunteering by workers can be found in small and medium enterprises, government agencies and nonprofit organizations.

“Corporate volunteering,” as commonly used, has become an umbrella term that takes in all of that. Indeed, not once that I can recall in the almost 70 interviews done in our research – with companies, NGOs and other observers of the field – did anyone challenge it.

The Corporate Citizenship (2010) consultancy, based in the U.K., provides what I believe to be an appropriate framework for operationalizing “corporate volunteering” as we are using the term in this book. They choose the term “employee community engagement” and include within that the following:

- Secondments
- Skills-based volunteering

- Personal volunteering
- Workplace activity
- Mentoring and other one-to-one support
- Management committee/trustee positions
- Team volunteering
- Employee fundraising

Just three quick explanatory notes. First, for those of us who do not routinely use the term “secondment (when spoken, emphasis on the second syllable),” it simply refers to a temporary full-time assignment. Thus, a company may “second” an employee to work in a business unit other than his own in order to complete a given project, fill in for an absent colleague, etc. Likewise, they might “second” that person to an NGO or a public sector agency.

Second, “personal volunteering” is defined as resulting from “the employee’s own initiative, but which is supported by the company in some way.”

Third, “workplace activity” is meant to cover volunteering that takes place on company premises. That might include career days or job shadowing for students; micro projects that can be done on work breaks, during the lunch hour and before or after work; or, online volunteering.

The common denominator of all of these activities is the formal support of the company. A person volunteering strictly on his or her own time, with no support from the company, would not “count” in this formulation. I would agree that such activity falls outside the boundaries of what we normally consider “corporate volunteering.”

The breadth of this approach is consistent with the concept of corporate volunteering as a “big tent” that we will discuss in the next chapter.

## About the Underlying Research

The presenting stimulus for this book is the work done on the Global Corporate Volunteering Research Project, a two-year effort to develop new knowledge about corporate volunteering as it is being practiced throughout the world.

The project was undertaken by the Global Corporate Volunteer Council (GCVC), a network of almost 30 global companies, headquartered throughout the world, that are committed to the engagement of their employees as volunteers. GCVC was created by and is a program of the International Association for Volunteer Effort (IAVE), the only world-

wide network of individuals and organizations that exists for the sole purpose of promoting and supporting volunteering in all of the many ways it occurs throughout the world.

The research had two primary components. The Global Companies Study looked at the volunteer efforts of 48 global companies, using in-person and telephone interviews as well as document review to learn how these companies organize and manage their volunteering.

The State of Health Study was designed to “take the temperature” of corporate volunteering globally and regionally as well as to examine the trends, challenges, innovations and opportunities that are shaping the field.

I served as director of the project, working in partnership with Monica Galiano, president of Iniciativa Brasil and the thought leader for corporate volunteering in Latin America, and Sarah Hayes, who serves as the Consultant Director of the Global Corporate Volunteer Council for IAVE and brings her extensive experience managing corporate volunteering at KPMG and Starwood Hotels.

That this book is possible is due, to a great extent, to their hard work on the project and their valuable thinking as we analyzed the data and developed our conclusions and the framework for our reporting.

The final report of the project was released in June 2011 and is available in English, Spanish and Portuguese at [www.gcvcresearch.org](http://www.gcvcresearch.org).

This book greatly benefits from the work done during the research project. Readers of both this book and the research report will see similarities in overall approach and organization, some overlaps in content. Results of the research inform the book; examples of what companies are doing may appear in both places. In many ways, the book derives from the project.

But the book goes beyond the bounds of that research. We seek to draw in the research, experiences and insights of others to further inform what we learned, thus expanding the discussion of the why, the what and the how. It is “the research on steroids.”

## About Me

Readers deserve to know something about the author – experience, perspective, biases.

Here, then, a thumbnail sketch of my career: one of the early leaders of the Volunteer Illini Projects at the University of Illinois, at the time one of the largest, fully student-run programs in the country; fourteen years on the staff, eleven as executive director, of the

National Center for Voluntary Action and its successor, VOLUNTEER, the national volunteer center in the U.S.; from virtually its first day and for eleven years after, a senior executive at the Points of Light Foundation, including a stint with responsibility for all of its programs; a member of IAVE since 1980 and its volunteer World President from 1996 through 2001; since 2001, leading my own consulting practice, working throughout the world with leaders in NGOs, business and government.

I led the seminal 1979 U.S.-focused study that first described corporate volunteering as a definable field of activity and the follow-up 1986 study that articulated the first supporting business case.

A "late bloomer" in higher education, I completed my doctorate in Human Resource Development in 1996, just before my 50<sup>th</sup> birthday. My dissertation was "The Role and Meaning of Community Service in the Lives of CEOs of Major Corporations."

Part of my consulting practice, particularly in partnership with Monica Galiano in Brazil, has focused on corporate volunteering. I also was part of the original conceptualization and planning for ENGAGE in the United Kingdom, the joint effort of Business in the Community and the International Business Leaders Forum to promote corporate volunteering globally.

Throughout, I have had ample opportunity to help spread the word about corporate volunteering in the thirty-plus countries in which I have consulted and trained. With that has come the chance to learn from corporate staff who have the everyday responsibility for their company's volunteer efforts and from those with whom they work in the community.

What does this mean for what I bring to this book?

First, I clearly have a longitudinal perspective. As we will discuss in Chapter 3, I was present at the naming and blessing, if not at the birth, of the baby that has grown into what we now know as corporate volunteering. It gives me the confidence to share a historical perspective – with the cautionary recognition that no one wants to know too much about the past.

Second, I have a vested interest in corporate volunteering. It has been a thread throughout my career, occasionally a dominant pre-occupation. I have led organizations promoting and supporting it and have worked and profited from it as a consultant, researcher, author and speaker.

Those factors, longevity and vested interest, result in two conflicting perspectives that must be managed. On the one hand, it would be easy for me to be an unabashed advocate for and defender of corporate volunteering. After all, I have seen it in all of its glory and have helped sell it throughout the world.

It would be equally easy, on the other hand, to be the cynic because I also have seen the “dark side,” the realities, the weaknesses of the field.

The intent, of course, is to be balanced, as objective as possible, praising when appropriate, critical when needed.

Third, I am an American. Despite my extensive international involvement, I look at the world to a great extent through the eyes of the culture in which I was raised and educated. On a practical level, like most Americans, I have no fluency in any language beyond English. Thus I am limited in my ability to track and learn from those who publish in other languages.

At the same time, I am very conscious that one of the greatest challenges to the field of corporate volunteering is the lack of mechanisms to facilitate effective global sharing and learning. That was one of the motivating factors for the Global Corporate Volunteering Research Project, one of the reasons I am so pleased that Fundación Telefónica has “created the moment” within which this book could be written.

## About the Book

The book is divided into six sections.

LAYING THE FOUNDATION moves from this introductory chapter into an overview of the current global state of health of corporate volunteering and then moves back in time to explore the origins and development of the field.

STATING THE CASE reviews the rationale for corporate social responsibility (CSR), the framework within which corporate volunteering fits and then examines each component of the classic rationale that it is “good for the community, good for the employees, good for the company.”

PREPARING TO ACT first presents conceptual models of corporate volunteering and six fundamental keys to excellence and then digs deeper into the critical roles played by corporate culture and by top company leadership, including an examination of the benefits these leaders gained through personal volunteering.

IMPLEMENTING FOR IMPACT looks at three distinct areas of activity – building strong partnerships with NGOs, how individual and organizational learning happens through volunteering and the new emphasis on skills-based and cross-border volunteering.

MEASUREMENT AND EVALUATION explores how companies do or don't collect data about their volunteer efforts, how they evaluate their own performance in the process of those efforts and how they assess impact.

REFLECTING AND PROJECTING discusses key issues and challenges to corporate volunteering and suggests potential future development.

**The Style.** My intent in this book is to “break the fourth wall” and engage with the reader, not stand apart. Thus, the style is decidedly informal, a bit conversational. “I,” “we” and “you” will show up regularly. Questions are asked. Suggestions are made. Praise and criticism are meted out. Even some prescriptions are given.

**NGOs.** Throughout the book, we use NGOs, the common shorthand for “non-governmental organizations,” instead of “nonprofit,” “not-for-profit,” “voluntary” or “community organizations.” While there may well be nuances that differentiate all of these from one another, particularly from one country or region to the next, NGO comes closest to a globally understood descriptor for all.

**Efforts versus Programs.** More often than not, we speak here of companies’ “volunteer efforts” rather than their “volunteer programs” as a way to reinforce our belief in the inherent value of the breadth and diversity of volunteering companies promote and support. Some of those are formalized “programs” but others are less formal, perhaps even spontaneous, and employee rather than company driven.

**Inspiring Practices.** It is important to explain that you will not be reading about “best practices” in this book. One of the conclusions of the GCVC research was that “‘inspiring practices’ are better than ‘best practices’ – ‘best’ is in the eye of the beholder and all practices are highly situational.”

What if, we asked, people differ on what is a “best practice?” What if they really aren’t “best” but rather just “most popular practices”?

The result was the concept of “inspiring practices” which we defined as “those things that capture our attention and our imagination, that make us stop and think and can lead us to adopt or adapt them.”

A key aspect of “inspiring practices” is that they are grounded in desired outcomes that they are best suited to deliver. They are applied for a purpose, not because they are the “hottest” new idea sweeping the field.

Thus, when you read the examples of what specific companies are doing, evaluate them critically. Would they work for you? What can you learn from them? How could you adapt them to the benefit of your work?

In short, be inspired – thoughtfully.

**And More.** Throughout the book, you also will find “Think About It” boxes that summarize major ideas, ask questions and frame reflections. This is a way to “stimulate the

dialogue.” Yes, it is OK to “talk to yourself” about these things. It is even better if you can engage with colleagues about them.

Thinking and reflecting are most beneficial, of course, when they result in informed action. The “Move to Action” boxes suggest next steps, propose ways to proceed, provide tools to get started.

### **A Closing Thought**

It has been over 30 years since I first learned and wrote about corporate volunteering. Over these three-plus decades the world has changed much. But the commitment of business to the engagement of their workers in service to their communities has only grown. Now, as we will discuss throughout, there is an entire cottage industry of NGOs, consultancies and academics that has grown up with ambitions to lead it, support it, study it, serve it and profit from it.

Old forms of corporate volunteering have been renewed and re-energized; new forms have emerged. What was once a primarily American phenomenon has globalized. But the rationale for the field has stayed much the way it was in the beginning – good for the community, good for the volunteers, good for the company.

We invite you to join this exploration of origins, change, today's reality and future possibilities.

## Chapter 2

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# The Dynamic Global Force

**“Corporate volunteering is a dynamic, global force, driven by companies that want to make a significant difference to serious global and local problems.”**

That was the “bottom line” conclusion of the Global Corporate Volunteering Research Project.

Throughout the world we heard similar assessments of the state of health of corporate volunteering. There is, we learned:

- growing commitment to volunteering as an integral part of corporate social responsibility (CSR) and sustainability strategies;
- a trend toward focusing on specific priorities, leveraging a diversity of company resources, including volunteers, in the expectation of maximizing impact across a broad range of human, social and environmental problems;
- increasing recognition of volunteering as a strategic asset to help achieve business goals;
- an “optimistic dynamism” as volunteer efforts are rethought, redesigned and renewed to meet new realities in society, companies and the lives of working people;
- emerging attention to regional and cultural differences in how volunteering is understood and practiced throughout the world;
- new investment in skills-based and cross-border volunteering as important ways to leverage company resources and increase impact.

What does all of that really mean? What does corporate volunteering, circa 2011, really look like on the global stage?

Imagine if we could leap on a magic carpet together and whiz around the world for a day. Virtually any place we went, we would find examples of corporate volunteering. Consider what we might see as we fly from east to west, north to south and back again.

- In Australia, employees of **National Australia Bank** are planting over 60,000 trees, the equivalent of the trees it takes to produce the paper NAB uses in a year.
- In Beijing, **China Mobile** employee volunteers are leading after-school activities for children, visiting with seniors in “elderly houses,” and supporting disaster relief efforts throughout the country.
- Working through Maitree, their employee association, volunteers from **Tata Consulting Services** in India are leading HIV-AIDS awareness programs, participating in rural village development initiatives, staffing a computer training center for people with visual impairments and tutoring children in schools.

- In 2009, 93% of the employees of **MTN Yemen** participated in volunteer projects that included cleaning up historical places in support of tourism, road safety campaigns, care for orphans and sporting activities – all as part of the “21 Days of Y’ello Care” program of volunteer service sponsored for its employees in 14 African countries by **MTN Group**, the multinational mobile telecommunications company.
- Employees of Saudi Arabia’s **National Commercial Bank** are lecturing in schools, coaching entrepreneurs and, in teams, providing flood disaster relief and helping out in camps for displaced people.
- **Boygner Group** retail store employees in Turkey mentor young women, ages 18-24, who have grown up in orphanages and have been socially and economically excluded, supporting their personal development and improving their job-seeking skills.
- **Telefónica** employees in two hemispheres are at the heart of the company’s *Escuelas Amigas*, a program to match 5<sup>th</sup> and 6<sup>th</sup> grade classrooms in Spain and Latin America via the Internet for cultural exchange, communication and collaboration.
- While employee volunteer committees in **Vale** operating sites throughout Brazil are preparing for the annual V-Day of service that will mobilize over 7,000 volunteers, engineers from the company and its suppliers are inventorying the infrastructure of public schools to help them qualify for government assistance for needed improvements.
- Teams of **Pfizer** employees in the United States are putting their professional skills to work to improve the quality of services to Alzheimer’s patients and their families.

Now imagine that multiplied over and over and over again – from the largest global companies to regional and national businesses to small- and medium-sized enterprises – in virtually every country around the world.

Imagine volunteers focused on basic human needs and issues of social justice; imagine them finding new ways to help people become more self-sufficient; imagine them fighting to save the environment; imagine them responding to natural and man-made disasters worldwide.

Imagine skilled people – from truck drivers at **UPS** and retail workers at **C&A** stores to lawyers from **Linklaters**, food scientists from **Kraft Foods** and executives from **IBM** – putting those skills to work for NGOs, governments and multilateral institutions.

Imagine masses of people who know how to organize and execute high quality work mobilized through “days, weeks and months of service,” the project-focused volunteering that is rapidly becoming ubiquitous both within individual companies and in communities – from **Camargo Correa**’s Do Good Day, **Citi**’s Global Community Day, **GSK**’s Orange

Day and **Motorola Mobility's** Global Week of Service to **AXA's** CSR Week and **Ford's** Global Week of Caring to **UPS's** Global Volunteer Month, **Samsung's** Global Festival of Sharing; **Telefónica's** International Volunteering Day and **Timberland's** Serv-a-palooza.

If you can imagine all of that, well then, you have a sense of what corporate volunteering looks like today.

*There are no solid, reliable, widely acceptable quantitative measures of corporate volunteering that enable us to see growth or contraction over time or to compare countries or regions with one another.*

But, where are the numbers, you might ask? How many companies have volunteer programs? How many people are involved? Are the numbers growing or shrinking?

The reality is that there are no solid, reliable, widely acceptable quantitative measures of corporate volunteering that enable us to see growth or contraction over time or to compare countries or regions with one another.

Thus the story of corporate volunteering writ large rests in the stories of what companies are doing, of the challenges they face and how they solve them, of the innovations that companies and NGOs are developing together, and of the impact of their efforts on communities, the employees who volunteer and the companies themselves.

As we will see in the next chapter, Back to the Future, that has been the reality since the earliest days of corporate volunteering.

### The Big Tent

As the project team reviewed the data we had collected in the Global Corporate Volunteering Research Project, we searched for an appropriate metaphor to describe the nature and scope of the field.

We settled on that of a circus, with corporate volunteering as the "big tent" that encompasses a broad range of activities, philosophies, approaches and management structures. We wrote that it is "not unlike a circus that has a wide variety of acts, performing simultaneously so that wherever the spectators look, there is something to enchant them, some special skill or talent that will impress."

Playing out the metaphor:

"But the elephant trainer rarely climbs to the high trapeze. The clowns rarely enter the lion cage. Rather, they remain in their comfort zones, fulfilling their

missions as they have defined them, using their core competencies to perform up to their potential.

"Some have more tricks than others. They ride camels as well as horses; walk the high wire as easily as doing comic stumbles into the ring. Some actually create their own circuses, bringing together all of the acts into a coherent whole.

"These images of the diversity of a circus fit corporate volunteering well. Some companies offer some version of almost every form of volunteering to their employees, retirees, families and friends. Others are more specialized, with a narrower band of programs and opportunities targeted to only some of their employees. A few may have only a single 'act', a specialty that fits them."

That led us to this key conclusion: "**There is no 'best way' to do corporate volunteering.**"

Decisions about the nature and scope of a company's volunteer efforts are highly situational, based on its culture, priorities, resources, the nature of its business and workforce and the on-the-ground realities of the communities in which it does business.

While it is better to do something than to do nothing, it is not necessarily better to try to do everything.

This theme will recur throughout this book. It underlies our argument that we should quit talking about "best practices" – which are difficult to objectively determine and may, in fact, simply be "most popular practices" – and focus instead on "inspiring practices" from which we can learn and be motivated to adapt as appropriate to our own realities.

As an example, one of the most interesting programs we encountered was that of **BHP Billiton**, the global mining, oil and gas company based in Melbourne, Australia. Their entire volunteer program consists of matching employee volunteer hours with money. They do not operate volunteer projects, have no day of service, do not offer released time. Rather, they match volunteer time at US\$8 per hour (up to 480 hours per year) and match employees' personal financial contributions and the money they raise.

Some companies and observers might well challenge this as a minimalist effort.

But this approach fits BHP's values and realities well. The company is made up of many different business units, a broad diversity of employees working in many different environments, a high percentage of whom work in remote operating locations. The company believes that those on-the-ground employees know best what is most important in their communities. Very often that translates into support for small local organizations that might otherwise be overlooked.

Because BHP highly values consistency in employee policies across the entire company, they find it most comfortable to have a single approach for all. If miners cannot take released time, the logic goes, then neither should office workers.

The point here is not whether this is “right” or “wrong.” It simply is one act in the “big tent” and it works for them.

### From Local to Global and Back Again

Corporate volunteering has moved around the world in three broad phases.

In the first phase, U.S. companies, the pioneers in corporate volunteering, extended their existing programs throughout their systems, including those abroad, the latter in what might today be called a “stealth mode,” largely invisible and not overtly promoted. A prime example is **Levi Strauss** which, by the mid 1980s, had quietly and systematically established Community Involvement Teams in their office and plant locations around the world.

The second phase was the inauguration of volunteer efforts by companies headquartered outside the United States. Some examples:

- In the U.K., promotion of long-term secondments to community organizations was begun by the Action Resource Centre in the 1970s and of short-term, broader-based corporate volunteering by the national Volunteer Centre circa 1983 with quick pick-up from leading companies like BP, British Telecom and Whitbread.
- In Japan, where there was a tradition of business leaders running their own philanthropic projects, the first formal corporate volunteer program was that of Fuji Xerox in 1990. But as early as the 1960s, government-owned public monopolies – including Nippon Telegraph and Telephone and Japan Airlines – were allowing employees leaves of absence to participate in Japanese Overseas Cooperation Volunteers (JOCV). By the mid 1980s, some 340 private companies were providing similar leave opportunities.
- It started in Brazil in the early 1990s, when C&A volunteers first began working with children through schools and NGOs. By the time of the first national survey in 1999, at least 10 Brazilian companies and 12 to 15 multinationals had formal volunteer programs.
- Samsung is widely recognized as the first company in Korea to launch a formal volunteer program, announced in 1994, setting up a secretariat and launching the Samsung Volunteer Corps a year later and, in 1996, expanding the program globally.

The third phase corresponds with the most recent globalization of business. As companies have become truly global in their operations, they have also globalized their CSR and sustainability policies and programs, including volunteering, almost as a matter of course.

But they also have been responding to growing global expectations for how they will behave. In 2000, Thomas Friedman predicted this development in his book *The Lexus and the Olive Tree* when he observed that there is no longer any place for business to hide.

No longer is it possible, given the immediacy and transparency of internet-based communications, for businesses to escape scrutiny by moving operations to obscure locations in developing countries. Now, local expectations for business behavior often arrive before the business itself.

At the same time that global companies were expanding their volunteer programs, more regional, national and local businesses were adopting volunteering as well. Thus, for an organization like the Corporate Volunteer Association (Özel Sektör Gönüllüleri Derneği) in Turkey, fully 50% of its 50+ members are native Turkish companies.

And why not? If the business case for corporate volunteering is as strong as claimed, then what is good for global companies should be equally good for those operating on a smaller playing field.

As a result, the world of corporate volunteering is now a vibrant mix, a rapidly globalizing activity largely defined by the way it actually happens at the local level. Even in the largest of the global companies, those closest to the work or, in this case, those closest to the community will ultimately decide the work to be done.

As corporate volunteering has spread, regional differences have become increasingly apparent.

- Africa and the Arab nations are in the early stages of building their own models based on their respective, very rich, cultural approaches to volunteering as natural, organic parts of life, often rooted in familial relationships.
- Asia-Pacific is a veritable beehive of activity as local models emerge at the same time that Western models are being adapted. There is much for the world to learn from this region.
- Europe is characterized by diversity in approaches and growth in acceptance and scope. It is a clear leader in developing models for collaboration among companies.

- Latin America is demonstrating the viability of models that emphasize social change and the development of active citizens with a clear understanding of social realities.
- North America is the most mature region, learning how to globalize their programs and to adopt and adapt ideas from other regions while continuing to drive innovation.

These emerging differences present two significant challenges to the field.

First, global companies, wherever they are headquartered, must navigate these differences in the same way that they have learned to succeed in vastly different business environments, adapting to local values, customs and expectations. They must learn that what works at headquarters or in their home country may not be appropriate in other parts of the world.

Second, for the field as a whole, there is the challenge of building systems that will enable global sharing and learning. Doing so will require conquering language barriers; building a network of “informants” who are constantly searching, reporting and linking; taking full advantage of the Internet and social media – all requiring new, sustained investment to build, refine and operate. We will explore this challenge further in Chapter 16.

### Telefónica's Proniño to Address Child Labor

Companies have increasingly been willing to address many of the world's toughest challenges. **Telefónica** is one of those, demonstrating that no matter how complex, how controversial the problem, committed companies and their employees have key roles to play in seeking solutions.

Responding to the reality of over 5 million children at work in Latin America and the Caribbean, Telefónica has aligned itself with the goal of the International Labour Organization to eradicate all child labor by 2020.

Its vehicle is Proniño, a comprehensive social action program in the 13 Latin American countries where the company does business. Working through a network of 118 NGOs, 674 alliances and almost 5,000 schools and daycare centers, the program reaches over 160,000 children and teenagers every year.

Proniño, managed by the company's Fundación Telefónica, is built around three strategies that impact children, their families and schools, and society in general:

- Comprehensive protection by ensuring children have the support they need to remain in school, including assistance with nutrition and health, and by working directly with their families;
- Improved educational quality by supporting the renovation of schools and the use of information technology, primarily through the Telefónica Foundation Classrooms that are equipped with computers and Internet access; and,
- Social and institutional strengthening by raising awareness of the issue, creating networks for intervention and prevention and by building the institutional capacity of partner NGOs and schools.

One of the program's strategic objectives is to "increase the management capacity of institutions and communities so that they can independently tackle the issues of children's rights and child labor." Capacity building within Proniño includes tools for monitoring work, independent quality audits with feedback to the NGOs performing the work and standardizing and communicating knowledge built through the program.

Telefónica volunteers are involved throughout Proniño. They:

- Work in after-school programs;
- Help partner NGOs monitor the families of participating children;
- Conduct family and community workshops on education, hygiene, use of free time;
- Support capacity building in partner NGOs in administrative areas like legal, information technology, financial management; and,
- Work in support of teachers and social workers.

Every year, 100 Telefónica employees from all over the world dedicate two weeks of vacation time to volunteer in Proniño projects.

Volunteers are at the heart of Telefónica's Escuelas Amigas, a program to match 5<sup>th</sup> and 6<sup>th</sup> grade classrooms in Spain and Latin America via the Internet for cultural exchange, communication and collaboration.

Telefónica volunteers are "activators" in the project, working in teams to be physically present in the participating classrooms in support of the teachers, providing technical assistance on the use of Web 2.0 tools and monitoring the work that is done. In Spain, the volunteers also are responsible for selecting schools to participate. In Latin America, the schools are those with a Fundación Telefónica Classroom.

The classrooms communicate and work together on pre-designed educational material through blogs and teleconferences, and the Telefónica volunteers' role is to activate and accompany both the teachers and the pupils during the five months the project lasts.

## Focus for Impact

Certainly 10 years ago, few companies would have had a specific focus for their volunteer efforts beyond broad categories like education, youth and community services.

Now, focus seems to be "in." Many of the companies interviewed for the research project were seeking, in some way, to narrow the focus of their overall community efforts and, by extension, their volunteering to a limited number of high priority issues.

The reason is the laudable desire to "make a difference" in demonstrable ways. There is the belief that concentrating resources improves the opportunities to leverage the breadth of corporate resources – human, financial, in-kind and relational – and, by doing so, to increase impact. In some cases volunteering is an integrated, significant part of the effort; in others, it is necessarily peripheral because of the nature of the issue and the work to be done.

At the same time, it would be wrong to gainsay the corresponding potential value to a company's brand of being publicly aligned with a specific, high priority issue. It is better to be known as the company that helped cure a disease or save a life or address a crisis than one that "gets lots of people to do lots of good things."

The list of issues companies are addressing is impressive. We identified almost 30 among the companies in the research project – a sample is in the accompanying box – many of which would generally be recognized as truly global challenges. They include some that might seem surprising for corporations – women's empowerment, climate change, economic empowerment – because they are often controversial.

But companies also remain conflicted about the extent of focus that is desirable. In many cases, what appears to be articulation of a specific priority is actually much more of a framework within which a broad variety of activities might take place. As one corporate manager put it, "We want our priorities to be focused but not too tight."

This grows out of the reality of how power and authority are distributed and how work gets done in companies. Headquarters can create a global framework of expectations, company priorities and policies. But implementation is necessarily driven down through the company, enabling local management to remain responsive to local realities and employee interests.

As we will see again when we discuss skills-based volunteering, the interests of employees, at least when it comes to their volunteering, do not always correspond with the company's priorities.

If volunteering is seen as part of a broader strategy of employee engagement and empowerment, then it is critical that their employees' interests help shape the company's volunteer efforts.

### Think About It

There is always potential tension between a company's priority interests and the volunteer interests of their employees.

- For some companies, this will lead to frustration – "they don't want to do what we want them to do."
- For others, it will lead to balance – "we encourage employees to volunteer within our structured, focused programs and we support initiatives they want to create."
- For yet others, it will lead to enlightenment – "we are learning from the employees about the most important priorities in their communities and, together, are deciding the best ways for us to respond in order to have the greatest positive impact."

Which company are you? Which do you want to be? How best can you get there from where you now are?

### Addressing the World's Challenges

Here are 10 of the focus areas companies have chosen for their CSR and community involvement generally and their volunteering specifically.

- Child labor
- Infrastructure development – water, sewage, housing, food
- Climate change and sustainability
- HIV-AIDS education, prevention and care
- Critical needs of farm communities and rural areas
- Preventable blindness
- Improving health care delivery systems
- Support for children with life-threatening illnesses and their families
- Microfinance and microenterprise
- Embracing diversity and people with disabilities

*“Corporate volunteering is a growing, evolving force, changing to meet new community needs and new company and employee expectations.”*

## Optimistic Dynamism

“Corporate volunteering is not static. It is a growing, evolving force, changing to meet new community needs and new company and employee expectations.”

Drawn from our interviews with global companies, this conclusion in many ways mirrors the constancy of change that characterizes 21<sup>st</sup> century life. Little did management guru Peter Vaill know what was ahead when, in 1989, he first offered the image of “permanent whitewater” as a metaphor for the change, the turbulence, the urgency that engulfs not just organizational life but, it seems on some days, all aspects of life.

The concept was actually offered to Vaill by a corporate manager at a workshop Vaill was leading. He quotes that person as saying, “No sooner do you digest one change than another one comes along to keep things unstuck. In fact, there are usually lots of changes going on at once. The feeling is one of continuous upset and chaos” (Vaill 1989).

Throughout the research, we heard a lot about change – about how volunteer efforts are being re-conceptualized, reorganized, renewed and about how, as they are growing in prominence and perceived importance within companies, there are new expectations for their performance, new pressures on them.

We also heard a lot about the “permanent whitewater” reality of corporate life.

Despite the fact that the research followed closely on the heels of the late-2000s “Great Recession” and the global financial crisis of 2008, we heard much more good news than bad. None of the global companies interviewed suggested that the global crisis had diminished their commitment to CSR, community involvement or volunteering. Rather, we heard about what the companies perceived as positive outcomes for these efforts. Some companies reported that one result of the recession was new employee energy for volunteering, particularly in response to the basic needs of people who are unemployed or otherwise vulnerable. Companies responded to financial constraints by more strategically using volunteering to leverage the giving of money and to sustain employee morale and pride in the company during difficult times. Some indicated that they had expanded the ways in which employees planned and managed their volunteer efforts, offsetting lack of staff that could be dedicated to that work.

Over and over again, we witnessed excitement, anticipation and high expectation for corporate volunteering, both within individual companies and for the field as a whole.

Even in cases of extreme change, volunteering was not just surviving but thriving.

Midway through the research project, we learned that one of our sponsoring companies, **Motorola**, was to be split into two. By the end of our project, it had happened, with the company becoming **Motorola Mobility** and **Motorola Solutions**. Both have announced their intentions to sustain their volunteer efforts.

Although now separate companies, they share a common heritage of deep commitment to community involvement and philanthropy that originated with company founder Robert Galvin and his family. Over time, volunteering at each will undoubtedly evolve in ways that reflect their respective emerging priorities and cultures.

According to Eileen Sweeney, senior director of the Motorola Mobility Foundation, the foundation took seriously the charge of their CEO and other company leaders to move ahead in developing new programs from the outset of the new company.

They began with the core competencies of the new company, asking what they could uniquely bring into the community, exploring the new opportunities that came with the separation to bring greater focus to this aspect of what had been their overall business.

While continuing their broader volunteer efforts, such as their Global Week of Service, they are also creating opportunities that build on the interests and skills of their software and user interface designers, allowing them to respond to the needs and wants of NGOs to better use technology in their work.

Just seven months into its life as a new company, Motorola Mobility announced its purchase by **Google**. Eileen and her team will continue to execute their strategy as they navigate their own company's whitewater.

As this book was being written, **Kraft Foods** announced its intention to split into two companies, a global snacks group and a North American grocery business. Ironically, this followed its merger, just 18 months earlier, with **Cadbury PLC** in the U.K. That merger led to the combining of Kraft's "Ambassador Corps" with Cadbury's "Community Champions," similar approaches to engaging employee volunteers as leaders and promoters for their Delicious Difference Week and other volunteer efforts.

Although there had long been ad hoc volunteer activities within the company, Kraft only formalized its volunteer program in 2008, in part in response to the expectations of the employees. With the enthusiastic backing of their CEO, Irene Rosenfeld, the first Delicious Difference Week took place in October 2009, just seven months after it was approved. Following the merger, the Week was seen as an excellent way to bring Kraft and Cadbury employees together in a common activity, a step in building a shared culture.

So, by the time of the anticipated corporate split sometime toward the end of 2012, in a span of around four years, the Kraft volunteer effort will have gone from ad hoc activity to formalized program, a highly visible and successful signature event, a merger with a company that had its own well-established volunteer effort and a corporate split.

Sounds a lot like permanent whitewater.

At **C&A** in Brazil, the relationship of corporate change to the volunteer effort has been a bit different. Here is how Luiz Covo, coordinator of their Programa Voluntariado, described it:

Beginning this year, 2010, there will be a new movement inside C&A, called national mobilization, which is about recovering company values, a reaffirmation of what has always been important. The values that are newly in evidence are the values that have always been asserted through a culture of volunteer work at C&A. Volunteer work was the last area to be impacted because it protected these values; there was already an atmosphere that preserved them. We have managed to keep further away from the turbulence and at the same time the program has become increasingly stronger.

One of the ways in which organizations seek to survive permanent whitewater is through processes of planned change. As described in the accompanying box, **Citi** provides an excellent example of how that can happen as the company "re-engineers" its volunteer program.

### The Citi Strategic Re-Engineering

Citibank is one of the pioneers of corporate volunteering with a formal program dating back to 1970. In the four decades since, both the company and the volunteer program have undergone significant transformation. The company has grown from its roots in New York City into a global financial institution. The volunteer program waxed and waned over the years until, as the current Citigroup website announces, "a formal volunteer program was created in 2003." The evolution of their volunteering entered a new phase in 2009 with "strategic re-engineering," a process that through its design and the thoroughness of its execution offers a great example from which others can learn.

There undoubtedly was a time in 2008, at the height of the global financial crisis that Citi employees wondered whether the company would survive, let alone whether it would continue its heritage of community involvement and volunteering.

The launch of the re-engineering process just a year later sent a clear message that volunteering was to remain an integral part of life at Citi.

The willingness of employees to participate in the process reflected the perceived value of volunteering as a way to sustain morale.

As described to us by Rosemary Byrnes, Director of Citi Volunteers at the Citi Foundation in New York City, the process was focused both externally and internally. **Externally**, Citi examined how volunteering was being done at other companies, benchmarking their own efforts against those of others. The focus was not just on what was working well in those companies but also on the challenges they had faced and the way they had overcome those challenges.

Citi found a great willingness on the part of other companies to assist and a high level of collaborative dialogue among them.

Out of this exercise came the decision to make the development of "volunteer councils" a core strategy for Citi. They find that being employee driven, gives a sense of entrepreneurship, an innovative feel, to their volunteering.

Working in tandem with the company's community relations offices, the councils find ways to leverage existing relationships in the community to develop volunteer opportunities. The councils enable a focus on volunteer engagement at the micro level.

**Internally**, the process was designed not only to generate feedback on the existing situation and ideas for the future but also to build internal buy-in and investment in the program.

Regional volunteer leaders in six U.S. markets and in each global region were invited to select employees to participate in a "process of discovery." Ultimately almost 100 employees, organized into small groups, gave their input through conference call discussions.

After the resulting data was aggregated and analyzed, initial conclusions were formulated and then shared back with the participants in a second series of calls for their review and feedback.

# Chapter 3

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## Back to the Future

The definitive history of corporate volunteering has yet to be written.

In part, that is because it has existed largely on the margins of the business community. For much of its history, it has been kept apart from core business operations, rarely closely aligned with human resource management or development, only one small aspect of corporate social responsibility, largely only anecdotally documented.

There is little institutional memory built into the field. Rather, there is a sense of “déjà vu all over again” as companies start, grow, reduce and stop their volunteer efforts as their business realities, structures and management change – and then do it all over again.

It is not unusual for me to interview companies and discover that I know about things they were doing one, two or even three decades ago that the current folks have no idea ever existed. In their eyes, they are inventing corporate volunteering in their company, not resuscitating it.

Similarly, there is little institutional memory within the NGOs that promote and support the field. Often, there is as much change, as much turnover, as much “out with the old and in with the new” in those organizations as there is in the companies they serve.

As a result, there has been no consistent repository of knowledge. Much of what there is to know about the history of the field exists only in “fugitive documents,” gathering dust on forgotten bookshelves or buried in the archives of individual companies, effectively beyond reach.

Perhaps the lack of a well-recorded history is reflective of the very nature of corporate volunteering. It is not about yesterday but about the immediacy of today and the potential of tomorrow. It is about action, not reflection.

It is managed by very busy people expected to do more with less while continually justifying the importance of work not directly related to the “bottom line.” It is supported externally by organizations and consultants hoping to remain competitive in the space by continually creating new programs, products or services to attract the attention and support of companies.

But the absence of a definitive history does not equate with a lack of value of history. It is important to know from where we have come, to see our roots as a way to understand the soil in which we are potted and are growing.

Philosopher George Santayana (1905) may be popularly remembered for his observation that “those who cannot remember the past are condemned to repeat it.” But the sentences that come just before are rarely repeated:

Progress, far from consisting in change, depends on retentiveness. When change is absolute there remains no being to improve and no direction is set for possible improvement: and when experience is not retained... infancy is perpetual.

Thus, we ask your indulgence as we detour from today to yesterday, using a few precious pages to revisit the origins of corporate volunteering and recapping its development – a small attempt at retaining experience. The story actually begins at least 200 years ago and, with apologies to the rest of the world, it begins as an American story.

## The Foundations of Corporate Volunteering

There are three foundational pieces for corporate volunteering as we now know it – the rise of business leaders as community leaders; the American tradition of community initiative and volunteering; and, the concept of corporate social responsibility.

**Business Leader as Community Leader.** In the second volume of his trilogy on American history, Daniel Boorstin (1965) wrote:

Our now common word “businessman” seems to have been American in origin. It came into use around 1830 in the very period when the new Western cities were founded and were growing most rapidly. Even a casual look... will show how inaccurate it would be to describe him as simply a man engaged in mercantile transactions. We might better characterize him as a peculiarly American type of community maker and community leader. His starting belief was in the interfusing of public and private prosperity. Born of a social vagueness unknown in the Old World, he was a distinctive product of the New.

For such a man, then, “not to boost your city showed both a lack of community spirit and a lack of business sense.”

Those whose primary purpose was business saw that their success was directly related to the health and growth of their communities. It was in their best interests to promote their cities, to improve transportation to make them more accessible, to make them great places to live. It was only a small step for them to become leaders in community affairs.

They were what Boorstin termed “a new breed: the community builder in a mushrooming city where personal and public growth, personal and public prosperity intermingled.”

The record of business leader as community leader has continued unabated since, whether it is from the small business on the High Street or the 50<sup>th</sup> floor executive suite.

On one level, it is driven by a logic based in reality, one that we will see recur in the late 20<sup>th</sup> century:

- business has legitimate requirements for positive external relationships;
- development and maintenance of those relationships is well within the formal role expectations of the leaders of a business;
- community service is a legitimate and effective way to fulfill that role.

On another level, it is driven by the same overt self-interest in which it was first formed, the recognition that, generally, business thrives best in healthy, prosperous communities (local, national or global) that have motivated and well-prepared workforces. When human, social and environmental problems threaten those communities, it is in the self-interest of business to intervene.

Sol Linowitz (1976), present at the birth and later chairman of the board of Xerox, argued that it is “simply good business to become involved in the needs of our society. And any businessman who fails to understand it is not only begging for trouble, but risking the future of his own enterprise.”

As we will see in Chapter 9, the involvement of business leaders in the community has distinctly personal and professional benefits that complement whatever sense of obligation they may feel.

**Community Initiative and Volunteering.** But leadership for communities also lies with the people themselves. Virtually every book written about volunteering in the United States quotes Frenchman Alexis de Tocqueville who visited in 1831 and wrote *Democracy in America*, still considered one of the most insightful analyses of the United States by a foreign visitor.

He was amazed to discover:

... an immense assemblage of associations in that country. Americans of all ages, all conditions, and all dispositions constantly form associations... [not only political and commercial] but associations of a thousand other kinds, religious, moral, serious, futile, general or restricted, enormous or diminutive. The Americans make associations to give entertainments, to found seminaries, to build inns, to construct churches, to diffuse books, to send missionaries to the antipodes; in this manner they found hospitals, prisons, and schools. If it is proposed to inculcate some truth or to foster some feeling by the encouragement of a great example, they form a society. Wherever at the head of some new undertaking you see the government in France, or a man of rank in England, in the United States you will be sure to find an association.

It was his belief that in democratic nations “all the citizens are independent and feeble; they can do hardly anything by themselves, and none of them can oblige his fellow men to lend him their assistance. They all, therefore, become powerless if they do not learn voluntarily to help one another.”

The result, as Boorstin (1965) later wrote, “From the beginning, *communities* existed here before there were governments to care for public needs or to enforce public duties.”

The strength of that tradition of voluntary action, of the willingness of people to volunteer to help one another and to build their communities, has ebbed and flowed over the decades but it has never disappeared. It has been at the heart of all of the great social movements in the United States and at the core of life in every community.

**Corporate Social Responsibility.** CSR, as we now term it, is neither new nor only now visible and important.

Indeed, the concept of corporate social responsibility traces back to at least the early part of the 20<sup>th</sup> century, to a 1916 article in the *Journal of Public Economy* by J. Maurice Clark, “The Changing Basis of Economic Responsibility.”

In a 1971 keynote speech at the Life Insurance Conference, Donald MacNaughton, then chairman of the Prudential Life Insurance Company of America, argued that CSR was not new, “that the franchise under which business functions is granted for the benefit of the people. If this be true, then business has always had a social responsibility” (Allen et al. 1979).

But, in fact, it was not until the 1960s that the term took on a concrete meaning in a form we would recognize as familiar today.

Norman Kurt Barnes, writing in *Fortune* in 1974, looked back over the previous decade, summarizing this way: “Beginning in the mid 1960s, and spurred powerfully by the sight of American cities in flames, a fair number of senior executives became persuaded that business had both a moral obligation and a compelling need to deal with social problems – that just making money wasn’t enough” (Allen et al. 1979).

Thus, the key pieces of the foundation for corporate volunteering – the business leader as community leader; the tradition of volunteering; and the concept of corporate social responsibility – are in place.

## The 1960s and 70s

Five other factors were present in the 1960s and 1970s that contributed to the emergence of corporate volunteering in forms we recognize today.

First, it was a **time of change and activism**. The civil rights movement was the beginning, the focal point for the activism that defined the post-World War II American baby boomers. It was followed by the anti-war movement, the environmental movement, the War on Poverty, women's liberation, the sexual revolution. It was a time for people to care about societal problems and social justice, a time for people to take their concerns and energies to the streets in both constructive and destructive ways.

Second, there was a **new focus on public service and on volunteering**. President John F. Kennedy had called Americans of all ages to a greater sense of their responsibility to serve, creating the Peace Corps and Volunteers in Service to America (VISTA), the landmark government volunteer programs, as vehicles for that service. He also challenged people of vision, talent and commitment to step forward and serve the nation in public service through government and in their chosen careers.

By 1969, the focus had shifted to "voluntary action," the idea that many community problems were better solved through the voluntary efforts of concerned citizens and their organizations than through government. This included an overt emphasis on building local and national infrastructure to promote and support increased and more effective individual volunteering.

Third, there were **growing expectations for businesses** to become more socially responsible and more engaged in the community. While pressure was greatest from outside business – everyone, from government officials to academics to community activists, was visible and vocal on the issue – it also came from within the business community, both from those who believed it was the "right" thing to do and those who saw it as being the best way for business to survive and thrive.

Fourth, a **new generation of workers** with new expectations of their employers and of themselves were entering the workplace. By 1970, organized student volunteer programs were flourishing on university campuses. Many were created and managed by students themselves. But many were formally organized and supported by the universities. Thus, young people being hired into businesses were bringing with them their own personal activism and the experience of institutionally supported service.

They recognized the importance of volunteering as a response to social problems and as a fulfilling personal activity. They brought to their new jobs the expectation that their employers would behave in socially responsible ways, including helping them to be involved in the community just as they had in college.

Finally, the **infrastructure was in place** to observe, learn and document the emergence of corporate volunteering. In November 1969, President Richard M. Nixon announced the creation of the National Center for Voluntary Action (NCVA) to be a "non-profit, nonpartisan organization... established by distinguished private citizens working

with government officials and using private funds” to “encourage and assist effective voluntary action throughout the private sector (Nixon 1969).”

NCVA was the first organization known to have been created explicitly to be a national leadership organization for the concept and practice of volunteering. In many ways it was the prototype for all of the national volunteer centers that exist throughout the world today. Its primary priorities are mirrored in the infrastructure that continues to evolve to promote and support volunteering: creation of local “volunteer centers;” collection and dissemination of information about effective volunteer efforts; awards for outstanding volunteer service; major media campaigns to promote volunteering and to connect people with opportunities to serve; training for volunteer leaders and managers.

Because NCVA’s volunteer leaders were drawn, in part, from the business community, it created an important direct link between volunteering and the interests of business. More importantly, it was there, in the right place, at the right time, with the right motivation to serve as something of a mid-wife for corporate volunteering.

### Think About It

Many of the same conditions exist today to promote corporate volunteering:

- We are in an age of rapid, unending change driven by globalization and of a greater awareness of human, social and environmental problems driven by the Internet and instant communication.
- Volunteering now is understood to be a universal activity, part of the human imperative to help, to respond to need, to be involved in shaping individual and collective futures. It is being promoted worldwide, often with the support of elected leaders, as a way to solve problems, strengthen communities and benefit those who volunteer.
- Expectations for CSR and community involvement by business are now global.
- Young people worldwide are engaged in community service at schools and universities and are bringing expectations into the workplace for how their employers will behave and that they will have the opportunity to volunteer.
- Infrastructures to promote and support volunteering are expanding and growing stronger throughout the world. Increasingly, parts of those are specializing in corporate volunteering.

We are in a new era of maturity and innovation in corporate volunteering.

## Volunteers from the Workplace

By late 1976, when I became its executive director, NCVA was but a shadow of its original self. Our job, then, was one of survival first, renewal second.

We were a relatively young and relatively naïve team, in many ways learning on the job. We were particularly attuned to the interests and needs of our existing and hoped-for funders. As we visited with potential corporate contributors, we discovered that they were most interested in telling us about their volunteer programs and asking for our counsel about how to strengthen them.

It became clear that if we were going to compete for their money we needed to add value to their work. (Readers from nonprofit organizations: put a big mark next to that sentence – it is as true today as it was then!)

Thus was born the Volunteers from the Workplace (VFW) project, the first comprehensive study undertaken to learn about how companies and organized labor encouraged volunteering by workers. The added focus on organized labor, replicated in a follow-up study seven years later, further distinguishes this from any other research done.

The VFW research was built on extensive surveying and interviewing – including surveys of 400 of the largest U.S. companies with extensive follow-up by mail and telephone to encourage response; telephone interviews, averaging 90 minutes each, to 135 companies; personal visits to 39 companies; and a phone survey of 50 companies to learn more about the personal involvement of their CEOs in community volunteer activities.

The research identified 333 companies with some form of volunteer effort. Over 30 years ago – 333 companies. Imagine that!

There were few quantifiable results that could be captured. As the final report notes, “Virtually no company kept records on the quantity of employee volunteer efforts and none had made serious efforts to attach dollar values to [it].” (Allen et al. 1979.) The greatest learning came from the interviews, from the stories each company told.

Four overall conclusions emerged. If you listen carefully, you may hear themes still relevant today.

- “Employee volunteer efforts are an increasingly important aspect of overall corporate efforts to act in a socially responsible way.
- “Despite the growing importance of employee volunteer programs, most are not given serious attention or the necessary resources for success.
- “The ‘best’ programs are those that are mutually beneficial to all the actors – the community, the corporation and the employees.
- “The most critical element in the success of programs is the interest and support of top management, including the CEO.”

Here is what we wrote as an overall summation of the state of health of corporate volunteering in 1979:

Clearly such programs are in their infancy... Systems are only now emerging to manage the corporate volunteer. First efforts at networking among corporate volunteer coordinators are just beginning. Linkages to the broader volunteer community for the first time are being forged.

This is a time of exploration, discovery and growth.

### When Did It All Begin?

The actual beginning of corporate volunteering as we now know it is lost in the mists of time. Perhaps the earliest reference (at least that I know of) is a report in the Pittsburgh Chronicle newspaper of an offer by miners to dig coal without pay one day each month, provided the coal was delivered free to poor people – in 1865 (Ellis and Noyes 1978).

Around 1965, Ellsworth Culver, later co-founder of Mercy Corps International, began the Involvement Corps in San Francisco to encourage and help companies create employee task forces to work on urban issues. It was likely the first NGO created solely to promote corporate community involvement.

As we prepared for the VFW project, we found scant earlier research in the literature. A 1972 report from the Human Resources Network highlighted 92 companies with employee volunteer activity. The Clearinghouse on Corporate Social Responsibility in 1973 identified 131 insurance companies with volunteer efforts; in 1978, that had grown to 187. When asked to describe the origins of their programs, some managers indicated that they had grown out of long traditions of community service in the company but most indicated that they had begun within the preceding 10 years.

In the VFW report, we cited the 1968 creation of the Levi Strauss Community Involvement Teams and the beginnings of formal volunteer efforts at Bell Labs in 1969 and Citibank in 1970 and the social service leave programs at IBM in 1971 and Xerox in 1972.

## The Roots of Today's Corporate Volunteering

In the VFW research, companies were asked to indicate the nature of their volunteer efforts.

Although the labels may be a bit different than we use now, many of these specific activities will sound familiar.

Almost 80% reported "loaning personnel" to nonprofit organizations; 70% had released-time policies; in 66%, employees, usually executives, were serving on boards of

directors; over 60% were doing group projects; nearly 40% had some form of internal volunteer clearinghouse; and, 12% offered their employees "social service leave."

In these activities are the roots of much of what we know as corporate volunteering today. Here are some examples from the research (Allen et al. 1979).

**"Released Time.** Based largely on the tradition of releasing executives for board service, released time is becoming a way to encourage all employees, salaried and hourly wage, to become active. At the same time, it offers the company the opportunity to 'volunteer' by absorbing the cost of wages and lost productivity as part of its responsibility to the community.

**"Loaned Personnel.** Businesses everywhere make a practice of loaning the skills, talent and time of their employees to a wide range of public [government] and private [NGO] agencies. The individual has a chance to demonstrate skills and to learn; company and community profit alike from the talents that are put to use to better the social and physical environments.

**"Group Projects.** The group project offers the opportunity for all corporate employees to concentrate their skills and energies on specific community needs with tangible results. Cited as the most visible of all corporate-based employee volunteer efforts, group projects allow workers to respond to a broad range of community needs.

**"Social Service Leave.** Social service leaves are generally intended to enable an employee to carry out a specific project with a specific community agency. This type of leave differs from other extended leave programs in being directed toward the welfare of others rather than being concerned primarily with personal development as might be the case, for example, in an employee returning to school for further training or education."

### A New Competitive Edge

By 1985, the National Center for Voluntary Action had morphed into VOLUNTEER: The National Center. Our engagement with businesses had grown steadily and we were now recognized as the primary resource organization for corporate volunteering in the United States. It was time for a follow-up to the original VFW study.

In the final report of this second study, *A New Competitive Edge* (Vizza et al. 1986), we were able to offer this assessment of the field:

Over the past ten years, corporations have become one of the primary sources of volunteers for nonprofit organizations. In that decade, employee volunteering has been the area of greatest growth and development in the field of corpo-

rate community relations as well as one of the most significant developments in the voluntary sector.

A primary focus of the report was to articulate the rationale for corporate volunteering. This was done through extensive discussion with people who had primary leadership and management responsibility for volunteering within their companies.

For the first time, the argument was overtly made that **volunteering is good for the community, good for the employees, good for the company**. Here is how we put it then:

First, employee volunteering is an appropriate and effective tool that corporations can use in meeting their overall economic and social goals and in responding to the expectations of their various constituencies or stakeholders. [Good for the Company]

Second, it is a source of human talent and energy for communities seeking solutions to difficult human, social and economic problems. Corporations provide willing volunteer hands and people with specific skills and expertise that may be unavailable anywhere else. [Good for the Community]

Third, because the workplace plays a central role in the lives of most Americans, corporations can support and encourage volunteering as one of the ways in which individuals can help themselves and others throughout their lives. [Good for Employees]

From those grew a four-point rationale, a response to the question “why do companies, should companies invest in employee volunteering?” Volunteer programs, we argued, are a way:

- For companies to respond to workers’ concerns about the quality of life in their working and living environments;
- To increase and reinforce workers’ skills, particularly in leadership and participatory decision-making;
- For a business to respond affirmatively to the public’s expectations of its involvement in community problem-solving;
- For corporations to demonstrate moral leadership, “doing the right thing,” which redounds to the ultimate benefit of the company.

As we will discuss in Chapters 4, 5 and 6, much of this rationale – what we now call the “business case” – remains in place today, strengthened by new knowledge and new realities.

### Closing Thoughts

Poet Robert Penn Warren (1961) wrote, "History cannot give us a program for the future, but it can give us a fuller understanding of ourselves, and of our common humanity, so that we can better face the future."

In the "permanent whitewater" of 21<sup>st</sup> century life, it should be reassuring that for 40+ years there have been people just like us working to make volunteering a valued, integral part of business. The history of corporate volunteering is one of ongoing re-discovery of its value to community, worker and company. It is not a linear history but is rather filled with all sorts of looping back on what has come before, detours, occasional collapses, vulnerable always to mega-changes but remaining persistent, resilient, compelling.

#### Move to Action

- How can you learn about the history of volunteering in your company? Is there an archive to consult? A retiree association whose members may remember?
- Are there opportunities in that history that you can leverage for promotion and visibility? Note that community involvement and volunteering were highly visible during IBM's celebration of its 100<sup>th</sup> anniversary as a company.
- Are there people from "back in the day" who can share their volunteer stories? What can you learn from how volunteering has evolved in your company?
- How does that evolution reflect the culture and values of the company?
- How can you share that history with others? Remember that history is one way to build and reinforce pride, especially when it reflects long-term commitment and impact.

# Stating the Case

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# Chapter 4

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## **Building on the Foundation of CSR**

Why?

That is the question. Why do businesses, established to create and market products and services with the end goal of making a profit, invest the time of their employees, the attention of management, and money to encourage and support their employees' volunteering?

But there is another. Why do those of us outside the business world, the community, think that it is such a great idea?

To properly build the case for corporate volunteering, we need to look first at the rationale for corporate social responsibility (CSR) as it is the overall framework within which corporate volunteering best fits. That is the purpose of this chapter.

### Why CSR?

If it has accomplished nothing else (though it has), CSR has spawned a cottage industry of NGOs, consultants, academics, government policy-makers and journalists seeking to understand, promote, support, study, argue about and make money from it – not to mention all the people within companies with some responsibility for thinking about what it should be, making it happen and actually doing it.

Try typing “corporate social responsibility” into Google. In .12 of a second, it returns “about 14,000,000 results” – oh yes, undoubtedly lots of duplicates in there but still quite a powerful response. Imagine what we would get if we did our search in the 10 most spoken languages in the world.

So we need to keep this as simple and straightforward as possible. To help us do that, we begin with one of the most often cited authors on the subject, Archie Carroll, professor emeritus at the Terry College of Business at the University of Georgia.

In a 1999 article (Carroll 1999), he traced the development of the “definitional construct” for CSR from the 1950s through the 1990s. If you are interested in how thinking about CSR has evolved over the years, this is a great place to start.

In brief, over the 50 years he reviewed, we have moved from a single seminal work – Howard Bowen's classic 1953 book, *Social Responsibilities of the Businessman* – through a long debate over definitions and rationale to a period of fewer definitions and more attempts to measure and conduct research on CSR.

Carroll, along with Kareem Shabana at Indiana University Kokomo, also wrote an academic paper on the business case for CSR (Carroll and Shabana 2010) that was adapt-

ed into a briefer overview publication by the Conference Board (Carroll and Shabana 2011).

They make it clear that “there is no single CSR business case – no single rationalization for how CSR improves the bottom line.”

They point to one set of rationales (Berger et al. 2007) to show the difference between narrow and broad approaches to justifying CSR. Berger and colleagues present three models:

- The social values-led model – companies adopt CSR for non-economic reasons;
- The business-case model – CSR is accomplished when there is a demonstrable link to financial performance;
- The syncretic stewardship model – recognizes both the “external market for virtue” and economic objectives.

Don't feel bad. I had to look it up, too. “Syncretic” refers to the attempt to reconcile different or opposing principles.

Carroll and Shabana state that the business-case model represents the narrowest view while the syncretic stewardship model represents the broadest view. They prefer the latter because it allows consideration of both direct and indirect relationships of CSR to business performance. As we will see later in the “business case,” that same sense of breadth is important in demonstrating how corporate volunteering is tied to business goals.

Moving into an examination of how various arguments in support of CSR are grouped, they focus on one (Kurucz et al. 2008) that shows CSR as “a viable business choice as it is a tool to:

- implement cost and risk reductions;
- gain competitive advantage;
- develop corporate reputation and legitimacy; and,
- seek win-win outcomes through synergistic value creation.”

Business in the Community (2011) in the UK worked with the Doughty Center for Corporate Responsibility at Cranford University to review academic and business literature between 2003 and 2010 to identify the business case “realized by businesses that embrace being responsible.”

They identify seven key business benefits of CSR:

- brand value and reputation,
- employee and future workforce development,
- operational effectiveness,
- risk reduction and management,
- direct financial impact,
- organizational growth,
- business opportunity, and,

two that are starting to emerge:

- responsible leadership, and,
- macro-level sustainable development.

The notion of “win-win outcomes through synergistic value creation” (Kurucz et al. 2008) essentially is an argument that there are opportunities available to businesses to apply CSR in situations and with stakeholders in ways that bring their competing expectations together and bring value to all.

To reinforce that, Carroll and Shabana quote Peter Drucker (1984) that “the proper ‘social responsibility’ of business is to... turn a social problem into economic opportunity and economic benefit, into productive capacity, into human competence, into well-paid jobs, and into wealth.”

They conclude their paper this way:

While it is valuable for a company to engage in CSR for altruistic and ethical justifications, the highly competitive business world in which we live requires that, in allocating resources to socially responsible initiatives, firms continue to consider their own business needs...

... beyond the many bottom-line benefits... businesses that adopt CSR practices also benefit our society at large.

Michael Porter and Mark Kramer have moved Drucker’s ideas further in their concept of “shared value.” In a 2006 article in the *Harvard Business Review* (Porter and Kramer 2006) they make a case for “the link between competitive advantage and corporate social responsibility.”

“The Idea in Brief” summary of the article captures the essence of that case:

CSR can be much more than just a cost, constraint or charitable deed. Approached strategically, it generates opportunity, innovation, and competitive advantage for corporations – while solving pressing social problems.

The authors make the point that while “successful corporations need a healthy society,” so too “a healthy society needs successful companies.” Thus, “the mutual dependence of corporations and society implies that both business decisions and social policies must follow the principle of *shared value*.”

They suggest that companies take a three-step approach to what they were still terming “strategic CSR.” Those steps are to “identify points of intersection between your company and society... select social issue to address... [and] mount a small number of initiatives that generate large and distinctive benefits for society and your company.” (Porter and Kramer 2006). That certainly fits with the trend we saw in our research of companies seeking to focus on a few key priorities that leverage the breadth of their resources – people, money, expertise, in-kind, etc.

Five years later, in another *Harvard Business Review* (Porter and Kramer 2011) article, they take the value of the concept further, seeing it as the solution to the growing alienation between business and the broader community and as an approach that should displace CSR. They write:

... the principle of shared value... involves creating economic value in a way that *also* creates value for society by addressing its needs and challenges. Businesses must reconnect company success with social progress. Shared value is not social responsibility, philanthropy, or even sustainability, but a new way to achieve economic success. It is not at the margin of what companies do but at the center.

They believe that “creating shared value (CSV) should supersede corporate social responsibility (CSR) in guiding the investments of companies in their communities” in large part because “it leverages the unique resources and expertise of the company to create economic value by creating social value.” This sounds like it could be part of the argument for greater focus on skills-based volunteering.

**Responding to Expectations.** While inherent in much of the discussion, it should be made explicit that the practice of CSR is and always has been undertaken in response to the expectations of others – employees, consumers, government, peers and society writ large.

*The Economist* (2008), often a CSR-skeptic, offers this explanation of why there is growing interest in CSR.

First, companies have to work harder to protect their reputations. They cite the seemingly endless list of corporate scandals and misbehavior and that “companies are being watched.” Specifically, they point to “an ever-expanding army of NGOs [that] stands ready to do battle with multinational companies at the slightest sign of misbehavior” and “myriad rankings and ratings [that] put pressure on companies to report on their non-financial performance.”

Second, there is strong demand for CSR from employees, investors are showing more interest in it and governments are pushing for it.

Third, growing concern over climate change is driving a strong focus on sustainability and “going green,” both as a wise business strategy for cost-savings and long-term health and in response to expectations from consumers, governments and those ever present “watchers.”

Seventeen months after that article, *The Economist* (2009) revisited CSR in light of the global financial crisis. Among the reasons they cited for optimism that CSR will survive are the expectations of both consumers and employees, expectations that companies have nurtured and from which they will find it hard to move back. In the publication’s inimitable style, their *coup de grâce* reads:

There is one other important reason for thinking that companies will maintain their commitments to sustainability through the downturn and beyond: the need to restore confidence in business.

The financial crisis was triggered by a bout of corporate social irresponsibility on a massive scale that has tarnished the reputations of even the bluest of blue-chip companies. Now corporate leaders have a chance to show that they are not just motivated by “short-termism” after all.

The 2010 global consumer study by Edelman (2010), the global public relations firm, reported these results relevant to our discussion.

- “86% of global consumers believe that business needs to place at least equal weight on society’s interests as on business’s interests.”
- “Consumers in Brazil, China, India and Mexico are more likely to purchase and promote brands that support good causes, outpacing their peers in the west.”
- “More than 7 in 10 consumers in the emerging markets would take action to support social purpose brands” – 80% in Brazil, 78% in India, 77% in China versus 62% globally.”
- “8 in 10 consumers in India, China, Mexico and Brazil expect brands to donate a portion of their profits to support a good cause.”

- “64% believe it is no longer enough for corporations to give money; they must integrate good causes into their everyday business; 61% have a better opinion of corporations that integrate good causes into business, regardless of why they do so.”

Recall our reference to Thomas Friedman’s *The Lexus and the Olive Tree* argument for what he saw as the emerging globalization of expectations about corporate behavior. It has happened.

**Milton Friedman and Friends.** Nobel Prize laureate economist Milton Friedman (no relation to Thomas) stands head-and-shoulders above other critics of CSR. His view was aptly summarized in the title of his 1970 article in the *New York Times*, “The Social Responsibility of Business is to Increase its Profits” (Friedman 1970). In short, he argues that the responsibility of those leading business is to maximize profits for the owners, the shareholders. While not necessarily fully understood by all who have heard of it, the article remains perhaps the most often cited anti-CSR position.

Friedman is not alone, of course. In one contemporary example, *The Economist* (2010b) points to a recent book, *The Case for Business in Developing Economies*. Author Ann Bernstein, the head of the Centre for Development and Enterprise in South Africa, argues that the greatest ways in which businesses can benefit society is “simply by going about their normal business.”

Commenting on the book, *The Economist* columnist Schumpeter observed, “Citizens of rich countries often fret about the occasional harm that corporations do, yet take for granted the prosperity they create. People in developing countries do not have that luxury.”

**A Response.** Katherine Smith (2010), executive director of the Boston College Center for Corporate Citizenship, writes, “Corporate citizenship professionals are often asked why their firms should make investments in the community and environment – and there is then often a scramble to find a financial return justification.”

Although recognizing that it is often not possible to “do well by doing good,” she points us to a 2009 study by researchers from Harvard University, the University of Michigan and the University of California-Berkeley that analyzed 251 studies of the empirical link between corporate social performance (CSP) and corporate financial performance (CFP). (Margolis et al. 2009) Their two primary conclusions:

- “After thirty-five years of research, the preponderance of evidence indicates a mildly positive relationship between corporate social performance and corporate financial performance,” at a level roughly equivalent to the “effect size for strategic planning.”

- “CSP does not appear to penalize companies financially nor impair their economic functioning... Doing bad, if discovered, has a more profound effect on financial performance than doing good.”

From this, Smith concludes: “Given that the data seem to prove that corporate social investment can’t hurt and it just might help on the margin, perhaps the question we should be asking about firm investments in social issues is ‘Why not?’”

**The World’s View.** Are attitudes about CSR consistent across geographic and cultural lines? The answer is a resounding, “Not necessarily.”

As one example, we learned in our assessment of the “state of health” of corporate volunteering that one of the perceived barriers to its development in Arab nations is the slow acceptance of CSR there. Without that, observers in the region argued, there is no framework, no overall motivating force for attention to volunteering.

Our friends at *The Economist* (2011b) helpfully reported on another study by Edelman that asked “informed publics” in 23 countries the extent of their agreement with Milton Friedman’s statement, “The social responsibility of business is to increase its profits.”

60+% of the respondents in the United Arab Emirates, Japan, India, South Korea, Singapore and Sweden “strongly agree” or “somewhat agree” with the UAE way out in front with 84% agreement. At the other end of the spectrum, 40% or less agree in China, Brazil, Germany, Italy and Spain. The U.K. comes in at 43% and the US at 56%.

It appears we ought not take for granted any single assertion about business and CSR. Like the world, it is a complex subject, influenced by history, culture and societal values.

What do the academics tell us about differences in CSR around the world?

A review of literature that puts CSR in a comparative perspective across countries (Williams and Aguilera 2008) makes it clear that there are varying attitudes toward and practices of CSR around the world. They partially attribute this to the absence of a universally agreed definition of CSR. The authors write: “It is not surprising that when individuals fill in surveys in different countries they have very distinct mental maps and expectations of what CSR is and is not, what it should be in an ideal world, and who should be involved in CSR issues.”

A European study (Furrer et al. 2010) found that not only are there differences in managers’ views of corporate social responsibility between Western and Eastern Europe but also differences among the specifics of social, economic and environmental corporate

responsibilities. Another shows that religiosity is positively related to support for CSR in Singapore and Hong Kong (Ramasamy et al. 2010).

Finally, please read the box “Drivers of CSR in Developing Countries.” This work by Wayne Visser of CSR International offers us important insights into how the forces shaping CSR differ in those countries.

To conclude: we cannot assume that support for CSR is uniform throughout the world – it is not; we cannot assume that the reasons CSR is gaining in importance are uniform throughout the world – they are not.

### Drivers of CSR in Developing Countries

Wayne Visser, founder of the think tank CSR International, identified 10 drivers for CSR in developing countries. These are worth a serious look because they offer significant insights that help build our understanding of the implications of cross-cultural differences for CSR generally and corporate volunteering specifically. They are:

- Cultural Tradition – “... CSR in developing countries draws strongly on deep-rooted indigenous cultural traditions of philanthropy, business ethics and community embeddedness.”
- Political Reform – “CSR in developing countries cannot be divorced from the socio-political reform process, which often drives business behavior toward integrating social and ethical issues.”
- Socio-economic Priorities – CSR is “most directly shaped by the socio-economic environment... and the development priorities this creates.”
- Governance Gaps – “CSR is often seen as a way to plug the ‘governance gaps’ left by weak, corrupt, or under-resourced governments.”
- Crisis Response – Economic, social, environmental, health-related or industrial crises “often have the effect of catalyzing CSR responses.”
- Market Access – “CSR may be seen as an enabler for companies in developing countries trying to access markets in the developed world.”
- International Standardization – “CSR codes and standards are a key driver for CSR in developing countries.”
- Investment Incentives – Multinational investments “increasingly are being screened for CSR performance.”
- Stakeholder Activism – “In developing countries, four stakeholder groups emerge as the most powerful activists for CSR, namely development agencies... trade unions... international NGOs... and business associations. These four groups provide a platform of support for local NGOs... The media is also emerging as a key stakeholder for promoting CSR.”
- Supply Chain – “... especially among small and medium-sized companies [a significant driver] is the requirements that are being imposed by multinationals on their supply chains.”

From his chapter “Corporate Social Responsibility in Developing Countries” in *The Oxford Handbook of Corporate Social Responsibility*, 2008 (Crane et al. 2008), with permission of the author.



# Chapter 5

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## The Volunteer Case for Corporate Volunteering

“It’s good for the community, good for the employees, good for the company.”

Since that phrase was first uttered 25+ years ago, the essential rationale for corporate volunteering has not changed. In this chapter we look at the volunteer case – the benefits of volunteering to those who volunteer. In the next chapter, we look at the business case – “good for the company” – and in the one after at the social case – “good for the community.”

## The Volunteer Case

Let’s assume that if you are interested enough to have read this far then you understand the overall value of volunteering both to the people who do it and to the communities they serve.

If so, you will recognize the rather standard list of the presumed benefits of volunteering to the volunteers. Now, let’s cast those benefits in terms of how they may be useful to volunteers in their work lives.

| Benefits to Volunteers   | Value in Work Life  |
|--|---|
| Opportunity to gain new knowledge  | Bring new knowledge of the community and its needs and assets into the workplace; can inform development of new products and services |
| Opportunity to refine existing skills  | Improve work performance  |
| Opportunity to learn new skills  | Increase potential for job change and promotion   |
| Opportunity to develop leadership skills   | Increase potential for job change and promotion   |
| Demonstrates commitment to values inherent in volunteering and community involvement | Align self with corporate values; potentially improve opportunities; increase visibility  |
| Brings a sense of personal fulfillment and wholeness                                 | Positive impact on work/life balance that can improve commitment and performance  |
| Greater pride in and loyalty to employer   | Improved work performance   |
| Builds social connections  | Potentially increase connections and networks within the company; expanded external networks may align with job responsibilities      |
| Opportunity to develop an expanded view of the world; to see how others live         | Greater openness to diversity and globalization; improved self-awareness  |
| Improved mental and physical health  | Feel better, work better  |
| Opportunity to demonstrate ability to make a difference                              | Increased sense of self-worth and confidence translates into better performance   |

| Benefits to Volunteers                        | Value in Work Life  |
|---|---|
| Opportunity to work with a team               | Improved readiness and comfort to work in team settings   |
| Possible exposure to new and innovative ideas | Potential contribution to workplace and/or to CSR program |

Note that we have begun many of the benefits with “opportunity to...” Volunteering is like most other activities – much of what we get out of them is up to us. No one can force a volunteer to be open to new knowledge or to learn new skills or to connect meaningfully with others. But volunteering presents those opportunities, often in settings that both encourage and facilitate that happening.

*“What we get out of volunteering is up to us. No one can force a volunteer to be open to new knowledge or to learn new skills or to connect meaningfully with others.”*

**Employer Perception of Benefits.** Think that volunteering doesn't contribute to making a person more competitive in the workplace? A 2001 survey of 200 of the U.K.'s leading businesses found that they actually seem to prefer employees who volunteer (Reed and TimeBank Survey 2001). Among the conclusions:

- 73% of employers would employ a candidate with volunteering experience over one without;
- 58% say that voluntary work experience can actually be more valuable than experience gained in paid employment;
- 94% of employees who volunteered in order to learn new skills benefited by getting their first job, improving their salary or being promoted.

A Volunteering Australia study (2007) of 136 employers of all sizes found related results.

- 32% said that candidate interest in their corporate volunteer programs would influence their recruitment choice as they only employ people whose values match those of the company;
- in companies with volunteer programs, 53% said that a candidate's level of community engagement was very (4%) or somewhat (49%) important in their recruitment process; 30% said it depended on the job applied for; only 17% said it was not important.

Perhaps, then, having an active volunteer life is an asset in getting, keeping and advancing in one's job.

**Employee Perceptions of Benefits.** It is difficult to avoid anecdotal reports of the positive feelings employees have about volunteering. Virtually any company with an organized volunteer effort can provide numerous examples. Almost every article about corporate volunteering contains at least one anecdote or quote about how much employees feel they benefited from their participation.

It is more than anecdotal, however, as formal studies make clear, that employees do perceive significant benefits from their volunteering. Here are some examples.

Employed people as well as the general population invariably report that they believe volunteering has a positive impact for them. The *Deloitte Volunteer Impact Survey* in the U.S. in 2004, 2005 and 2007 confirmed this. In the 2004 survey (Deloitte 2004), 62% of adults generally believed that corporate volunteer programs give employees the opportunity to connect with coworkers and build teamwork.

The 2005 survey was of adults who were either employed full- or part-time and found that 93% agreed that volunteering offers the opportunity to enhance leadership skills; almost 90% that it helps enhance problem-solving and decision-making skills; and, over 80% that it helps enhance negotiating skills (Deloitte 2005).

In 2007, the sample of adults age 18-26 found that just over 80% believe that volunteering offers opportunities to enhance their leadership skills and to develop skills they can use at work (Deloitte 2007).

The Institute for Volunteering Research, affiliated with Volunteering England, reported in 2004 on a major impact evaluation of employee volunteering at Barclays Bank (Brewis 2004), using both quantitative surveys and qualitative case studies. Benefits to employees who volunteered were clustered into two groups:

Volunteers noted an increase in self-esteem and confidence that came from having a chance to use their skills for the direct benefit of other people and on useful projects rather than "on just making money for the bank," as one volunteer put it.

Volunteers also benefited from being able to exercise their existing work skills and develop new ones.

The latter benefits increased the more often an employee volunteered.

When managers were asked how they felt employee skills had developed through volunteering, a majority had seen increased communication and leadership skills. The latter was particularly true for relatively inexperienced employees who had been leaders for their volunteer projects and had then brought that new experience back to the workplace.

Participants in the 2010 Give & Gain Day, the U.K.'s national day of employee volunteering sponsored by Business in the Community, also reported benefits. Seventy per cent of the volunteers reported developing skills in time management, communication, decision-making and leadership. Almost 60% "felt it was a great way to motivate their teams and reported that it gave them a huge sense of achievement" (Walker 2011).

In a study on volunteering at Westpac Bank in Australia, employees who volunteered "felt that their self-esteem was enhanced, and that they had learnt more about the community as a result" (Zappala 2003).

One study suggests that the benefits may be perceived differently by men and women (Peterson 2004). The author concluded that female employees are more likely to perceive volunteering as a way to build job-related skills. Also, for women, job satisfaction was highly related to volunteering, whether or not the volunteering was through a company program.

**To Your Good Health.** I still have vivid memories of giving a speech 20+ years ago in which I talked about the then emerging research that had begun to conclude that volunteering is good for one's mental and physical health. It was met with raised eyebrows, a few chuckles and overall skepticism. But, research over the past two decades has built an impressive body of evidence that, in fact, the original claim is quite true.

A prominent part of that early research was done by Allan Luks, for almost 20 years the executive director of Big Brothers Big Sisters in New York City, and an early and effective advocate for recognition of the bond between volunteering and health.

His 1980s study (Luks and Payne 2001) with 3,000 volunteers from 20+ NGOs in the U.S. resulted in his coining the term "helper's high" to describe the rush of endorphins that the human body releases during and after volunteering. Such a release of endorphins helps the body experience a feeling of calm that can improve one's emotional health.

In 2010, UnitedHealthcare and VolunteerMatch (2010) (those are not errors; coincidentally both run two words together to create their corporate names) surveyed more than 4,500 American adults. Of those who volunteered:

- 92% agreed that volunteering enriches their sense of purpose in life;
- 89% agreed that "volunteering has improved my sense of well-being;"
- 73% agree that "volunteering lowers my stress levels;"
- 68% agree that "volunteering has made me feel physically healthier;" and,
- 29% of volunteers who suffer from a chronic condition agree that "volunteering has helped me manage a chronic illness."

In its review of relevant research, the Corporation for National and Community Service (CNCS) (2007), the U.S. government's leadership agency for volunteering, cited numerous studies that show that "those who give support through volunteering experience greater health benefits than those who receive support through these activities."

That is to say that when volunteers report that they "get more than they give," at least in the area of health benefits, that clearly is the case.

Overall, CNCS reports, "research has established a strong relationship between volunteering and health: those who volunteer have lower mortality rates, greater functional ability and lower rates of depression later in life than those who do not volunteer."

Older volunteers are the ones most likely to receive these benefits. In part this may be because it is easier to observe differences in health and longevity in that population and to identify positive influences on them. Older people may also be more likely to experience isolation, low self-worth and ill health than younger people, all of which may make the impact of volunteering more evident.

This does not mean that volunteering does not carry health benefits for everyone. First, it is clear that a "habit of helping" developed early in life often leads to a lifelong habit of volunteering. Second, there is evidence in the research cited that "those who volunteer at an earlier stage are less likely to suffer from ill health later in life, thereby offering up the possibility that the best way to prevent poor health in the future... is to volunteer [in the present]."

### Closing Thoughts

When I was at university, deeply involved in building a large student volunteer program, other leaders and I often met at a local diner late at night to philosophize about and debate the virtues of the work we were doing to get our peers involved in the community.

One night one of our number announced, "I think we are doing this because we want to help other people." We all beamed with pride.

After a few moments, one perhaps a bit more politically aware said, "I think we are doing it because we want to help others to help themselves." Our prideful beaming grew larger and stronger.

Finally, a third said, "Well, I think we are doing it because we want to help ourselves while we help others to help themselves."

We fell silent, embarrassed at that possibility, and left.

All those years ago, it was not considered appropriate to think about what volunteers were getting out of their experience.

Fortunately, that has changed. Now we recognize that the motivations to volunteer are complex and that the benefits flow in all directions – to those serving as well as to those being served.

As we will see in the next chapter, the benefits employee volunteers receive from their involvement are an important component of the business case for corporate volunteering.



# Chapter 6

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## The Business Case

“Good for the community, good for the employees, good for the company.”

That is the traditional one line case for corporate volunteering. In the last chapter, we first looked at the broader framework of the case for corporate social responsibility. Then we examined the volunteer case – “good for the employees.” In this chapter we discuss the business case – “good for the company.”

### The Business Case

To return to the question we asked at the outset of the previous chapter: Why do businesses, established to create and market products and services with the end goal of making a profit, invest the time of their employees, the attention of management and money in encouraging and supporting their employees’ volunteering?

That is the question that the business case for corporate volunteering must answer.

To begin, we need to issue three cautions.

First, **perception has often been more valuable than proof in building the business case for corporate volunteering.**

For over 30 years, I have had CEOs tell me that one of the primary reasons they support corporate volunteering is that it helps the company recruit and retain the best people. The truth is that, for most of them from then until now, that is a matter of perception not proof.

Another example. “Our employees who volunteer are more productive, more loyal, have higher morale.” Perhaps true. It would be equally valid to say, “Productive, loyal, positive people are more likely to volunteer.” Which came first, the chicken or the egg?

But, it really does not matter. Perception often *is* reality. It is important what CEOs, top executives, and senior managers all the way through the corporate system believe to be true. If belief supports the desired outcome, then it is a lot easier and cheaper to accept it than to invest in seeking hard unassailable proof.

In fact, much of the data that might prove these beliefs is generally inaccessible outside the companies themselves. Often part of broad surveys of employee attitudes, the data may be available for internal use but are proprietary and usually not shared externally except in the broadest terms. We found some exceptions from the companies participating in our Global Companies Study but not many.

Second, **we need to keep the business case realistic.**

One of the conclusions of our research was that companies increasingly believe that volunteering is a strategic asset to help achieve business goals.

But that does not mean that volunteering is a “magic bullet.” At best it helps, sometimes directly and sometimes marginally. It complements. It supplements. But it is rarely at center stage. There are simply too many other factors at work in a corporate environment that contribute to or impede success.

This does not diminish the unique importance of volunteering, particularly because of its significant value outside the company, in the community. But it does mean that we should not oversell its value. Doing so will hurt the case, not enhance it.

The cause-effect chain should not be run out to tenuous lengths simply to add one more reason why corporate volunteering is a strategic asset. When that is done, it plants seeds of skepticism and incredulity and then provides them with lots of sunshine and water to grow and spread rapidly.

An example is the way in which the association of volunteering to “employee engagement” is discussed. While there are numerous definitions, frameworks and models of employee engagement – actually, it is beginning to be a lot like CSR in that regard – it is clear that there are a wide variety of factors that contribute to the extent it is present in a given corporate environment.

Volunteering is at best a secondary, possibly a tertiary or lower, contributor to one or more of those factors, along with a whole host of other contributors. There are common sense links that can be made and those are likely enough. To overstate its contribution may erode rather than build recognition of its value.

Third, **as we discussed with regard to the case for CSR, the acceptable business case for corporate volunteering *may not* be consistent worldwide.**

Our interviews with global companies headquartered in Asia-Pacific, Europe, Latin America and North America demonstrated broad acceptance of the same set of rationales. But our approach was limited, our sample was not random and we were able to interview in only a limited number of countries. Thus, had we gone across one border or another, we might have heard quite different arguments.

It is fair to believe that, with globalization, rationales over time will become very similar throughout the world. But there must always be sensitivities to cultural differences. We will discuss this further in Chapter 16.

**Our Approach.** Based on our research and on a review of extensive literature, here are four broad ways in which corporate volunteering *helps* to achieve business goals:

- managing the culture;
- strengthening the workforce;
- responding to internal and external expectations; and
- building external relationships.

We will look at each of these in turn.

### Managing the Culture

Corporate history and culture are significant influences on the nature and scope of a company's overall community engagement and its commitment to volunteering. In our study of global companies, we saw how corporate culture and values could translate directly into specific program initiatives.

My own research on the role and meaning of community service in the lives of CEOs concluded that one of the benefits of volunteering to them in their professional role was as a tool to assist in managing company culture. We could see this in several of our global companies as volunteering was one of the ways top leadership was reshaping culture.

With that bit of a tease, we will leave the rest for Chapter 9, where we will explore these ideas in much greater depth.

### Strengthening the Workforce

There are six areas in which volunteering can help strengthen the workforce: recruitment and retention, loyalty and morale, professional development, health and well-being, team building and preparing for the future.

**Recruitment and Retention.** Notwithstanding the story I told above about perception rather than proof, there is in fact growing proof that volunteering is one element that can help make companies more competitive for talent, particularly among younger generation workers, those labeled "millennials," roughly those born between 1980 and 2000.

Immediately, of course, we come up against the reality that there may be as many differences as similarities in that age group if segmented by region or country. But they have grown up in the same global culture; are part of the 24/7 economy; have access to technology and broadband connection that enables global, instantaneous and sponta-

neous communication; and share an age marked both by growing extremism and terrorism and emerging, freer societies.

The annual *Deloitte Volunteer Impact Surveys*, all done in the U.S., offer important insights into how this generation views itself, volunteering and employment.

The 2007 online survey of 1,000 millennials showed the gap between their expectations and the reality they perceived in their companies (Deloitte 2007).

| Expectations  | Perceived Realities   |
|---|---|
| 62% would prefer to work for a company that provides volunteer opportunities that uses their skills | 66% said their company did not discuss its volunteer program at all during the hiring process |
| 98% believe companies should offer skills-based volunteer opportunities                             | 39% believe their companies offer these opportunities   |
| 74% believe volunteering should be used for professional development                                | 28% believe their companies do that   |

The 2011 survey was done through online interviews with 1,500 millennials who work at companies with 1,000 or more employees. By comparing the responses of those who frequently participate as volunteers with those who rarely or never volunteer, it showed a close relationship between participation in company volunteer efforts and measures of employee engagement.

The volunteers were more likely to see the corporate culture as positive, to be proud of their company, to feel very loyal toward the company, to be satisfied with the progression of their careers, to recommend the company to a friend and to be satisfied with their employer (Deloitte 2011).

Half of the respondents also said they wanted their volunteering to have a professional benefit for themselves. This suggests that companies need to pay greater attention to how to make this benefit both visible and *real*.

One obvious possibility is through skills-based volunteering. But it can also happen through support for identifying and fulfilling specific individual learning goals and through documentation and acceptance of skills learned from volunteering.

Finally, even in the rarely or never volunteer cohort, 61% said that “a company’s commitment to the community would likely be a factor when choosing between two equivalent jobs.”

A 2006 survey of almost 1,000 directors, senior, middle and junior managers and HR professionals in a wide variety of businesses in the U.K. (McCartney 2006) had these results:

- 40% believe corporate volunteering has a direct impact on retention of high quality employees;
- 33% believe it has a direct impact on the recruitment of high quality employees.

In addition:

- 76% believe volunteering is a personal development opportunity;
- 69% believe it brings new skills, experience, ideas into the workplace.

Here is an example from our interviews with global companies. For **Tata Consulting Services** (TCS), based in Mumbai, India, their Maitree employee association is responsible both for their volunteer efforts and for other employee activities, including clubs, social events, athletic teams, etc. Maitree is very attractive to young workers who are away from home, many for the first time. It becomes their family, a place to spend their free time and their weekends.

Employees say that the combination of the values of the Tata Group and the activities of Maitree, particularly volunteering, are important to them with both rating highly on the employee satisfaction index. As a result, TCS believes that Maitree has helped increase employee engagement and reduce attrition.

It seems clear that for companies that want to compete for younger generation workers, key influencers are their corporate values, their commitment to the community and the way those are manifest through their volunteer efforts.

**Building Loyalty and Morale.** Of course, high levels of employee engagement are not important just for the younger generation. It must be a goal for all workers.

We learned through our interviews of the tremendous impact the wrenching changes to corporate life that grew from the global financial crisis and recession have had on companies. With increasing emphasis on employee engagement strategies, **building morale, pride and loyalty to the company now are desired outcomes of volunteering, not coincidental by-products.**

Here are a few examples from our research.

**Linklaters**, one of the largest law firms in the world, compared responses to their own volunteering research with data from the firm's all-employee survey. They

found that employees who volunteer have greater pride in the firm than those who do not.

They recognize that what they term “community investment” is not the principle reason people join the firm, but that it *is* an influence in recruitment and retention. Newcomers have indicated that they want to work for a firm that makes a commitment to the community.

At **Starbucks**, part of the strategic focus on their “partners” (employees) is “letting them carry out their community passions.” In stores where partners engaged in group community service activity, there was a 6% lower turnover rate than in stores where there was no participation.

There is growing understanding at **UBS**, headquartered in Zurich, Switzerland, of the contribution volunteering can make to employee morale. Its implementation model, with leadership for community affairs and volunteering vested in regional teams, recognizes that local culture, employee and community expectations, and opportunities for involvement differ from region to region and country to country.

**Professional Development.** In our discussion in the previous chapter of the benefits of volunteering to those who volunteer, we cited a number of studies that underscore that both employees and their managers believe that volunteering helps them develop new knowledge and new capacity for leadership as well as strengthen existing work skills and develop new ones. We will not repeat those same arguments here.

Check out the box in this chapter on the research study done by the Corporate Citizenship consultancy for the City of London Corporation that includes important data on the impact of volunteering on both loyalty/morale and skills development.

As we will discuss in Chapter 11, Learning by Doing, the experiential nature of volunteering is particularly important to the volunteer’s perceived skill development. There we suggest specific actions companies can take to maximize the learning benefit of volunteering.

### The London Study

In 2009, the City of London Corporation enlisted the Corporate Citizenship consultancy to study how corporate volunteering in education can help employees develop their skills. The study focused on 16 businesses and looked at 546 volunteers as well as line managers in those businesses (Corporate Citizenship 2010).

**This is a major and highly significant study that deserves extended attention.** While long and detailed, it is well worth reading. It can be found online at [www.corporate-citizenship.com](http://www.corporate-citizenship.com) in the Publications section.

The majority of employees responding identified four areas of skills development:

- Communication skills – both communicating with others and listening actively;
- Helping others set goals, coaching, providing training and development and evaluating performance;
- Ability to adapt to different surroundings, tasks, responsibilities and people;
- Negotiating and conflict-resolution skills.

The managers surveyed overwhelmingly affirmed what the volunteers reported, seeing “measurable gains in the same business-relevant skills” the employees reported.

The study also examined the extent to which volunteering impacted the volunteers beyond skills development. The results aligned with and verified many of the other studies we have cited.

Participants were asked to indicate the extent of their agreement with a series of statements all of which began “The volunteering activity improved/increased my...” Here are some of the results, with the percentage indicating the total of those responding “agree” and “strongly agree.”

- Self confidence – 79.2%
- Sense of well being/happiness – 91.3%
- Understanding of and empathy with others – 94.7%
- Awareness of wider social issues – 93.7%

On four issues of direct importance to their employers:

- Job satisfaction – 68.7%
- Pride in the company – 73.9%
- Commitment to the company – 66%
- Motivation – 73.4%

**Take time to read this one, both for its content and as a great model for the kind of serious research that can be done by companies working together with appropriate researchers.**

**Health and Well-Being.** In the last chapter, we demonstrated that volunteering is good for both the physical and mental health of those who volunteer. There is no less of an argument that employers benefit when their workers are healthy. If the goal is a healthier workforce, volunteering is a tool to help make that happen.

Business in the Community (2011) in the U.K. launched its Workwell campaign to promote wellness and improved employee engagement. It is built on four principles: better work, better relationships, better specialist support and better physical and psychological health.

They cite the final report of the Foresight Mental Capital Wellbeing Project from the U.K. Government Office for Science compiled in 2008 that names giving and volunteering as

one of five actions people can take to improve their emotional and physical resilience. (The others are connecting with others, being physically active, being aware of the world and of one's own feelings, and continuing to learn.)

Note that volunteering is but one, not the “only” or “primary” one, reinforcing the value of our having a bit of modesty in promoting its benefits.

In the Workwell schema, volunteering is one of the ways that companies can succeed in their “better relationships” principle. They propose, in their assessment model, the *input* of an employee volunteering policy by the company with the desired *output* of “personal development with skills learnt in the community brought back into the company.”

The *metric* to measure performance is “volunteering commitment” which they define as “volunteering undertaken in paid company time expressed as days per average number of Full-Time Equivalent staff per year” – in other words, divide the number of days volunteered in a year by the average number of days worked by a full-time employee annually.

For us, this metric seems a bit of a stretch, perhaps responding to the desire to have a quantitative measure. It does not speak to the breadth of volunteer involvement (the number of employees who volunteer), to employees' perception of the benefit of that volunteering to them or to any corroboration of whether the components of their desired output are met – personal development, skills learnt in the community or the presumably beneficial return of those skills to the workplace.

The broader point remains valid, however. Volunteering contributes to good physical and mental health for those who volunteer. The accumulation of those benefits across employees can make a significant contribution to the wellness of the workforce as a whole.

**Team Building.** We learned in our research with global companies that a major differentiator among companies is the extent to which they deliberately make use of volunteering to build stronger teams.

For many, team building is an ancillary benefit, an unintended but desirable consequence of volunteering. At **Eli Lilly and Company**, for example, a surprise outcome of their initial Global Day of Service was its contribution to team building. Now, even though participation is not mandated, this day has become a “corporate team building day,” increasing peer expectation of participation.

**Ford Motor Company**, on the other hand, has deliberately structured their group projects to create teams that cut across existing organizational silos. When projects from their partner NGOs are posted online, it is “first come, first served” with the first person

to sign up designated as the group leader. Known as the Ford Model Teams (read it carefully as Ford Model T[eams], a symbolic bow to the company's heritage), they are integral to the ongoing development of the new One Ford culture by drawing together people who might otherwise never have the opportunity to know, let alone work with, each other on a single team.

Staff responsible for volunteering at **National Australia Bank** (NAB) work to manage business unit expectations about what they can get from volunteering. For example, units may be trying to substitute volunteer projects for other team-building activities they might undertake. Instead, they may be steered toward a design that would have a half day of service and a half day of other team-building work.

### Move to Action

#### Tips for Successful Team-Building through Volunteering

- Pick a project worth doing, one that really needs your help and that makes a difference to your community partner or to specific beneficiaries.
- Align it as much as possible with what you know to be the interests of your employees as well as company priorities.
- Ideally, there will be a variety of roles for volunteers – some may match specific work skills, others may require people willing to do manual labor.
- Work with community partners that know what they are doing, that can and will adapt projects to meet corporate realities and that can play a strong management role.
- Prepare your volunteers beforehand. Don't bombard them, but do make sure they have all of the information they need well in advance. Be sure to be clear about appropriate dress, any specifics they need to know about what to do or not do, and logistical arrangements.
- If volunteers are to wear company T-shirts, caps or other special clothing, be sure all understand that and have it on hand.
- Work out health, safety, and liability issues beforehand.
- Figure out in advance how you will give visibility to the project – pictures posted on your website, blogging by volunteers, Twitter updates throughout the day, etc. – and then make sure to follow through and get it done.
- Build in social time including, whenever possible, the opportunity for volunteers to share a meal.
- Make after-action reflection an integral part of the project. Have someone prepared to facilitate discussion among the volunteers at the end of the day about their experience.
- Provide the opportunity, a day or two after the project, for volunteers to give feedback – what went well, what didn't, what they would change if they could, how they felt about it, what they learned.
- Debrief with your community partner. Don't rely on a survey. Sit down face to face if possible, by telephone at worst. Review how it went; listen carefully to their praise and criticism; really invite their critique and suggestions for change.
- Say "thank you" to the volunteers.

**Preparing for the Future.** For decades, one of the most consistent corporate commitments in the community has been to education. Later on, in Chapter 9, we will tell the story of the personal volunteer involvements of a group of eight CEOs, most of whom had a significant focus on public education; one, David Kearns from Xerox, even went on to become U.S. Secretary of Education. The reason for their interest was clear – it was not about today but about tomorrow, about the workforce that would be available to their companies 10, 20 or even 30 years down the road.

When companies take the long view, it is not hard for them to give priority to issues related to whether they will have the talented, committed workforce they need – not a few years from now but decades from now. That requires not only short-term improvement in school performance but long-term change in educational systems.

Engagement of their employees as volunteers in schools, in mentoring programs and in adult education is, of course, only one way that companies can impact workforce development. It is an important one because it brings future workers into direct contact with some of a company's best representatives, its employees.

One example from our global companies is **State Street** which partners with Year Up, a local NGO that pairs corporate mentors with low-income youth preparing to enter the workforce. Students in the program receive six months of in-house training on computer and soft skills as well as an internship and a mentor. Because the students are tracked for possible hiring, this is both a business strategy and a community strategy.

## Responding to Internal and External Expectations

In our discussion of the business case for CSR, we argued that in many ways it is in response to expectations from employees, consumers, government, peers and society as a whole.

While we cannot claim a groundswell of demand for the specific action of corporate volunteering from external stakeholders, there is some evidence of the value some place on it. For example, the 2004 *Deloitte Volunteer Impact Survey* interviewed over 2,000 adults, just over 60% of whom were employed (Deloitte 2004). The results:

- 87% believed it is important for companies to offer volunteer programs;
- 78% believed volunteer programs improve company image;
- 73% believed that corporate volunteering contributes positively to the community;

- 61% believed that volunteer programs help to communicate a company's values.

**IBM**, widely recognized as possibly THE premier global leadership company in corporate volunteering, clearly ties volunteering to their brand. Their On Demand Community online resource center for volunteering is intended to recognize the strength of and enhance the corporate brand.

Their volunteers are, for them, the embodiment of their brand – skills based and solutions focused. Business and community strategies are aligned around delivering smart solutions to the world. Volunteering is one way to ensure that their people have the ability and opportunity to do that.

Integrating volunteering into their brand is reflected in IBM's 2009 *Corporate Responsibility Report* that highlights examples of "IBMers whose work is helping to make our world healthier, more sustainable, fairer and smarter. Whether through volunteerism, scientific exploration, or working with clients to help transform the systems by which our planet works, they exemplify what it means to be a global citizen" (IBM 2009). The work of IBM volunteers stands with, not separate from, the contributions of all of their workers to the corporate mission.

Earlier in this chapter, we presented strong evidence that younger workers, particularly the so-called millennials, have clear expectations for their employers to be socially responsible, actively engaged in the community and to offer their employees' work skills to benefit NGOs and those they serve.

Enough said. Volunteer efforts are one way that companies can respond to expectations for socially responsible behavior and can enhance their brands, both internally and externally.

### **Building External Relationships**

Although relatively early in its development, collaborative volunteering is seen by some companies as an asset in strengthening relationships with external stakeholders – their supply chain, customers, alumni and strategic corporate partners.

The companies we interviewed who are beginning to use volunteering in this way emphasize that the high value these stakeholders have for the company means that things must be done right. Remember that your vendors, customers and strategic partners want the same high quality, high impact experience for their employees that you want for yours. They cannot be "add ons" to your project. Their experience is *your* responsibility.

## Move to Action

### Keys to Success: Building External Relationships through Volunteering

Here is what we learned from our global companies:

1. Manage the entire effort carefully. Be aware of what you are trying to achieve. Be aware of the realities of those you seek to involve. Bring the two together thoughtfully.
2. Relationship building takes time. Avoid the temptation to imagine short-term, overt exploitation of this “togetherness.”
3. Make the appropriate investment in the work – staff time, out-of-pocket costs, etc. Being cheap is not a way to perform well or to impress.
4. Be responsive to the interests and priorities of those you seek to involve. Your alumni are likely looking for something quite different from your vendors, for example.
5. Don’t do too much at once. Keep it simple. Perhaps invite participation in your “day of service” as a start. Walk before you run.
6. Remember that those you seek to involve have the same expectations that you do for their volunteering. They want to make a difference. They want to learn new things. They want to use their existing skills and develop new ones. They want to build new relationships.
7. Consider when collaborative planning is appropriate. It is one thing to invite someone to your party. It is quite another to plan a joint party. Be sensitive to your own barriers to sharing ownership and thus, potentially, visibility and credit.

At **Linklaters**, volunteering is becoming recognized as an option for joint activity with clients, including offering clients’ legal teams collaborative pro bono opportunities with Linklaters’ staff. They also make volunteer opportunities available to 2,500 of the firm’s “alumni,” maintaining relationships with them and, potentially, with the companies where they now work.

**Consumer Involvement.** A “new frontier” for corporate volunteering may be the potential to involve consumers. The *Global Consumer Survey* (Edelman 2010) that we referenced in the last chapter concluded that “consumers want to work alongside brands and corporations to develop the best ideas for solving the world’s problems, then tackle them head on.” Specifically:

- “71% believe brands and consumers could do more to support good causes by working together;” and,
- “63% want brands to make it easier for them to make a positive difference.”

In Korea, **SK Group** has two programs to engage consumers in volunteering. T-together has the overarching theme of helping multicultural children. Anyone can participate, by signing up through a website, in activities that include service projects, raising funds and donating blood. SK has developed smart phone applications to make charitable contributions more convenient for their customers.

Their SUNNY program offers university students two kinds of opportunities to volunteer. “General volunteers” teach and mentor underprivileged children and teach the elderly how to use mobile phones. “Specialty volunteers” use their artistic skills in performances and participate as junior members of SK Pro Bono teams that advise social entrepreneurs.

While the company plans and manages major programs, students also organize their own. They suggest projects to the SUNNY office that will address the specific needs of their region. They compete for project funding by demonstrating the value of their proposed work.

Over 200,000 students have participated since 2003. Since 2010, that has included Chinese students through SK China.

Importantly, SUNNY was not intended as a marketing tool but rather as a way to expand the company's mission for community involvement, as a way for them to promote volunteering in the broader community.

### **Closing Thoughts**

The business case has stood the test of time. But it has also benefited from the “broad approach” that Carroll and Shabana (2010) preferred in their literature review of the case for CSR. That approach allows the logic string to be extended from the direct benefits of corporate volunteering to companies to increasingly less direct benefits. It has resulted in a wealth of studies with concomitant amounts of data. It is important not to over-sell but to remain within the bounds of what will be credible and acceptable within each company.

# Chapter 7

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## The Social Case

“Good for the community, good for the employees, good for the company.”

In this chapter, we will explore the third component, the social case – “good for the community” – for corporate volunteering.

Our discussion here has two parts. First, we will outline the social case for corporate volunteering as we see it. Second, we will look at the potential costs to NGOs and how they can be ameliorated. Later, in Chapter 10, we will look explicitly at how to build strong, mutually beneficial volunteer partnerships between NGOs and businesses.

### NGOs and the Business Case

The strength of the business case for corporate volunteering is reflected in part in its widespread acceptance by the community, whether it be in broad surveys, in the media or in the willingness of NGOs to enter into programmatic partnerships with businesses.

How could it be otherwise?

First, as we laid out in the previous chapters, **it makes sense**. Volunteering is “good for” companies and volunteers in ways that are both intuitive and demonstrable. For those in NGOs who advocate for volunteering, how can there not be acceptance? Much of the business case is what they say about volunteering generally.

Similarly, no one would argue that corporate volunteering is overtly harmful. True, as we will discuss below, there are examples where it may be misguided, or not have as much impact as it could have, or may not even provide sufficient return on the investment that NGOs often must make in it.

Unintended consequences? Sure. But harmful? In 30 years in the field, I have never once heard that claim.

Second, it is to the benefit of NGOs to accept and put to work on their own behalf a rationale that has been broadly accepted by business. Most organizations welcome corporate support. If this rationale helps persuade companies to offer that support, then its acceptance comes easily.

However, **acceptance of the business case is not the same as articulation of the social case**.

The latter requires a perspective unique to NGOs. As they are mission-driven organizations, a key part of that perspective is their own version of a “bottom line test.” That is:

- Does corporate volunteering (or any other offered resource) help to achieve the organization's mission?
- Does it help address current priorities?
- Is it worth the cost?
- Is the return sufficient to justify the investment?

In short, NGOs must ask the same kinds of questions that businesses routinely ask.

Unfortunately, the social case for corporate volunteering does not fit into an easy, definitive declarative style. At best, it might look something like this:

Potentially, it is good for our organization, it may be good for the community as a whole, and it is usually good for the volunteers and the companies from which they come.

Use of the qualifiers is a critical reflection of the potential downsides for NGOs of engagement with corporations and their volunteers. The important benefits of corporate volunteering come not from the fact that it exists, but from the way in which it is carried out. The benefits to NGOs and to the communities they serve remain as potentials, not always realized in part or in whole.

*"The important benefits of corporate volunteering come not from the fact that it exists, but from the way in which it is done."*

## The Social Case

There are six components to our proposed social case.

### **Corporate volunteering brings new human resources to NGOs.**

Businesses can become important, sustained sources of volunteers generally and skilled volunteers particularly. They can bring to NGOs people who know how to work effectively.

At best, they can make a significant difference in the scope, quality and impact of an NGO's work.

At a minimum, corporate volunteering may be a source of increased "people power" that adds value through activities that remain important to do, even if they may only indirectly contribute to achieving the organization's mission. Examples might include one-off service projects and fund-raising or public awareness events.

### **Corporate volunteers can help build the operational capacity of NGOs.**

This is particularly true when they bring needed technical or professional expertise. Examples abound: companies that “adopt” schools and help teachers and administrators learn and use new technologies; volunteers who install and train staff in using new computer, communications, or accounting systems; volunteers who strengthen an organization’s management through training programs or mentoring. Such contributions can have long-term benefits by leaving behind new capacity.

When **SK Group** volunteers in Korea work with social entrepreneurs, their explicit goal is to build the management capacity of those efforts. The desired result is to multiply the impact that the social entrepreneurs or the company could have if either acted independently. SK puts together a team with a range of skills, from strategy development to accounting to marketing, that works for a year as part of the entrepreneur’s team. In preparing their volunteers, SK makes a conscious effort to help them learn to adapt to working in many different environments.

**C&A** in Brazil partnered with the GESC Institute in Sao Paulo to provide a 12-module management training program for the leaders of NGOs. It takes place at C&A three days a week over four months. C&A volunteers, typically from leadership positions in the company, work as consultants to the participants, drawing on their management experience to help the NGOs put the knowledge gained in the course to work.

### **The engagement of corporate volunteers may open the way to other resources from the company.**

Precious few are the organizations that have not hoped that when corporate volunteers arrive, so too will money, in-kind services, equipment, or products. At the very least, the presence of corporate volunteers can be seen as a tacit endorsement of the organization by the company.

In many cases, those hopes do come true. Many companies have come to believe that it makes sense to invest more in organizations that their employees have chosen to support through their volunteer efforts. This might be done through matching gift programs tied to the volunteers’ commitment, through outright donations or through development of a longer-term, more expansive partnership.

When **BD** employees went on the company’s first Volunteer Service Trip to Zambia, their goals included building capacity for improved health care. Not only did the company donate its own products, it used business connections to secure in-kind contributions from other companies.

As both NGOs and businesses look for mutually beneficial partnerships, these intensified relationships will increasingly bring additional resources into play, particularly as

companies recognize that for these partnerships to succeed, their NGO partners must have the capacity to participate effectively.

**The engagement of corporate volunteers creates an opportunity to educate them about the issues on which the organization is working.**

The effective engagement of volunteers, engagement that maximizes their value to the organization, is not easy to achieve. In addition to meaningful, results-focused work and good management, it should include:

- education about the issues the organization is addressing;
- opportunities for learning through reflection on the work that has been done and on the people with whom there has been interaction; and,
- opportunities for additional actions that take the organization's message to the community.

An organization that is effective in the engagement of volunteers takes advantage of their presence to educate them not only about the specific work of the organization but also about why the work is needed in the first place. Perhaps surprisingly for some NGOs, many companies are enthusiastic about that happening.

**C&A** employees are typically young people who are at a very early stage in their employment careers. The company is committed to helping them develop an understanding of the social reality of their communities and a norm of civic participation that they can carry with them throughout their lives. Volunteering is a primary way to accomplish both.

For over 40 years **UPS** has used its Community Intern Program to put advancing UPSers into the community through structured experiences in jails, shelters, halfway houses, etc. The 30-day program is described as “an orientation to instill the reality of community problems.” Participants can also help those organizations by bringing their unique business skills to the community organization during their internship.

The potential value of volunteers extends far beyond the formal work that they do within the organization. They can become educated, motivated ambassadors to the rest of the community, not only for the organization but also for the “cause” on which the organization is working.

That value is magnified when those volunteers can influence colleagues or even the company itself to take action.

One of the great advantages of recruiting volunteers from business is that one has access to a group of people who have shared values, with whom it is possible to commu-

nicate through established and legitimized systems, and who may command support from their institution.

These same characteristics increase the potential impact of the ambassadorial roles the volunteers play when they return to the workplace.

### **The presence of corporate volunteers can give the organization increased visibility and credibility.**

Let's be honest. Companies love to have their volunteers in matching T-shirts with logos prominent, and they love having pictures appear in the media or on others' websites even better. What can be better than being associated with a respected NGO known for its "good works?"

Well, if you are an NGO, what could be better than being associated with a respected business that is well known, has a great brand and is respected for its involvement in the community. Not only can this increase the NGO's credibility in the community, but it can attract funding, volunteers and its own media attention.

### **The engagement of corporate volunteers may offer the possibility of influencing corporate behavior.**

Corporate volunteering is important but insufficient for corporate social responsibility. Companies that are "good citizens" *contribute* in many ways to their communities. Companies that are "responsible citizens" *participate* in ways that can lead to changes in the way the community operates.

Participation of this sort can grow from the kind of involvement that begins with corporate volunteering.

Involvement leads to education...

... education to understanding...

... understanding to a new kind of action...

... action that results in systemic change as well as the amelioration of the effects of current conditions.

This is both the most important dimension of the social case for corporate volunteering and the most tenuous. The sequence that leads from involvement to action for change is neither spontaneous nor assured. It is a potential benefit but one that will happen only through conscious efforts.

Leadership for those efforts will most often come from NGOs but may also come from corporate volunteers or from others in companies. Indeed, the most productive action by NGOs may be to seek out and move to action those within companies who both understand and place value on this potential benefit.

## **At What Cost?**

That there is “no free lunch” is well-established. Everything carries a price tag, albeit one often expressed in obscure or nearly invisible currencies. As a result, life for people and organizations alike becomes a series of trade-offs built around “is it worth it?”

In the case of corporate volunteering, the potential costs for NGOs may be found in the unintended consequences of a relationship with a larger, more complex organization that operates within a framework of different values and that has its own needs, expectations, and desired benefits.

Here are three specific costs that could lead an NGO to decide that corporate volunteers may not be worth it after all.

### **It may cost the NGO money, time and lost opportunities.**

The company may have significant expectations or demands but is unwilling to provide the funding required for the organization to meet them.

A prime example may be in the growing corporate expectation that volunteering will be a learning, team-building, and leadership development experience for workers.

But is it the job of the NGO receiving the volunteers to ensure that these results are realized? Should the organization invest its resources in ensuring these outcomes for business or should it reasonably expect that businesses will pay for this service, just as they would were they to establish their own training or leadership development programs or outsource the task to consultants?

Once upon a time, I watched a dynamic play out in which companies insisted that their NGO partners needed to be more business-like. Then, when the NGOs figured out what it cost for them to manage a corporate service project and proposed a fee structure, the companies howled in protest. “Being business-like” did not extend that far!

### **It may divert attention.**

NGOs may be diverted from activities that are mission-driven and that address current priorities as they seek to keep their business partners/benefactors happy.

Virtually every NGO knows of a case where an organization has “invented” a project for a company in hopes that it will lead to a stronger relationship or more support. As one wag once put it, “Our walls have more paint than plaster on them because of the number of times companies have needed a ‘community project’ at the last minute.”

While such examples can be discussed with wry humor, they reflect a very real danger - that the NGO's real work will be overtaken by the agendas and expectations of those who have come to help, but to help on their own terms. Such an unintended consequence is certainly not uncommon when responding to the expectations of funders.

This is not to say that all of the expectations that businesses may have are inappropriate. Indeed, for many organizations, a corporate demand for “results” and for serious ways to measure them may be exactly what is required. A corporate expectation that its volunteers will be well-managed and will be given useful work to do, work that “makes a difference,” is neither inappropriate nor harmful.

NGOs must understand what they may be getting into when they begin to work with business, must assess both the benefits and the costs, and must regularly review both, internally and openly with the company involved, to ensure appropriate balance.

### **NGOs may be co-opted or even exploited.**

It is hard to bite the hand that feeds you.

Indeed, that is why it is reasonable, in one's more cynical moments, to wonder why companies take seriously the feedback they get when they survey NGOs about the performance of company volunteers in a service project.

Let's think about this. The NGO sees very real benefit to their relationship with the company and does not want to endanger it. Is it just possible that they might go light on criticism for one small project?

For many NGOs, the very nature of their work and their position in the community demand that they remain sufficiently independent to be able to advocate for a higher level of social responsibility from business than only the direct contribution of either volunteers or dollars.

But it does not always work out that way.

One global leader in a “sin industry” is reputed to expect that, in return for their support, the NGOs they support will appear in the company's image advertising, thus appearing to be accepting of products that cause demonstrable harm.

In another case, we recall well when a senior manager in a chemical company complained to a newspaper reporter that their employee volunteer efforts were not fully appreciated by the residents of a low-income community that the company had systematically polluted for decades, a community where the government was forcing the company to clean up its damage. Do we wonder why their volunteers, most of whom did not live in that community, were not more appreciated?

As corporate scandals have spread, among those adversely affected have been NGOs that had close ties with the companies and their executives. The NGOs have been faced with the difficult decision of when to “jump ship” and desert their now tainted corporate friends.

Are these cases extreme? Of course. But they make the critical point. Inevitably, there will be NGOs whose reputations and images will be affected by the actions and misdeeds of those with whom they partner or from whom they draw support.

This possibility is not reason enough to avoid such relationships. They do, however, underscore the need for thoughtful deliberation in advance – and for preparation, if the worst case happens, in order to manage it effectively.

“Is it worth it?” The answer in any specific case is less important than the fact that the question is asked, seriously considered, and answered.

## Closing Thoughts

It is critically important for companies to understand how corporate volunteering really looks from the perspective of NGOs.

It is too easy to assume that everything NGOs think about corporate volunteering is positive. Not necessarily so. Just as a corporation must think through the “what if” scenarios and be prepared to manage through them, so too must NGOs.

A very instructive story is the one we told about how businesses wanted their NGO partners to be more “business-like” until it came to sending them invoices for services rendered in managing their volunteer projects. On the surface it appeared simply that companies didn’t want to spend any more money than they had to. The deeper importance was what it said about how the businesses viewed their relationship with the NGOs, as one built on their own power to demand behavioral change and then renege on the logical application of it to them.

A great deal of the answers to all of the risks outlined in this chapter is to build strong, mutually beneficial partnerships between companies and NGOs, partnerships that may focus on volunteering but are rooted much deeper in shared commitments and expectations. We will explore how these partnerships can be developed in Chapter 10.



# Preparing to Act

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|--|------------|
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| <b>9. The Impact of Culture and Leadership</b> | <b>101</b> |



# Chapter 8

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## Frameworks for Excellence

The lights go down. The music begins. The spotlight finds the ringmaster in the center ring. He blows his whistle – and the circus begins!

What follows is a kaleidoscope of sights and sounds, mesmerizing acts, performers from throughout the world with their unique talents – combining to dazzle the expectant audience.

That, again, is our “big tent” image for corporate volunteering. The diversity of approaches companies are taking reflects the reality of the diversity of the business community itself, indeed the diversity of the world.

Here are two core thoughts...

**There are very real differences in the philosophies and operations of corporate volunteering from company to company – yet those differences do not appear to make significant difference to their success.**

... and...

**Success is influenced more by the extent to which the company values and invests in volunteering and by the quality of execution – and influenced less by the philosophy, approach or structure it adopts.**

But what constitutes “success?”

Is a company in Korea that can boast of a 90+% participation rate for its domestic employees as volunteers more successful than one in England that mobilizes a small percentage of its employees for high impact skills-based volunteer projects in Africa?

For us, for these purposes, we define “success” in these three questions:

- Is it meeting well-conceived and well-articulated company-set goals?
- Is it rated highly in quality of performance and achievement of desired results by key stakeholders (including community partners, employees, company management)?
- Has it demonstrated its “staying power” and sustainability over time?

**There is no “best way” to do corporate volunteering.** It is highly situational, shaped by the realities of what is desirable, appropriate and feasible for each company.

Decisions about the nature and scope of a company's volunteer effort need to be based on factors like its culture, priorities, resources, the nature of its business and of

its workforce and the on-the-ground realities of the communities in which it does business.

In this chapter, we will look at four conceptual models for corporate volunteering and at a series of key differentiators among approaches. Then we will look at what we believe are six fundamental keys to excellence, principles that are broadly applicable across companies no matter what their specifics.

## Conceptual Models

Four broad conceptual models for corporate volunteering emerged from analysis of our interviews with the global companies in the Global Corporate Volunteering Research Project. They offer us a way to look at corporate volunteering, to understand what intentions, what expectations may be guiding what companies undertake.

They are not “pure.” That is to say, no company is all one and none of the others. Nor are they mutually exclusive – they are not incompatible with one other; indeed, they may be used to reinforce or leverage one another. Some of each might be present in any given company’s approach.

The question is more one of dominance. What is the driving force? Where is the focus? What is the priority?

These models do not imply value judgments. They cannot be rated as “better” or “worse” on any reasonable scale that we can imagine, although from our individual or company perspectives, some may be more or less desirable.

For example, the debate of which is better, social services or social development, continues as it has for decades. Is it better to be in the classroom helping individual children learn how to read, or is it better to be working on changing the quality of education systems to improve learning for all?

The answer, at least for me, is easy – both. That is to say, we need volunteers in every classroom in the world, complementing what teachers are doing, giving special attention to individual children, bringing new perspectives and resources to the learning process. We also need volunteers to help improve how schools are managed, to build the skills of school administrators and teachers, to provide the latest technology – and volunteers who are strong, effective advocates for policy changes and resource allocations.

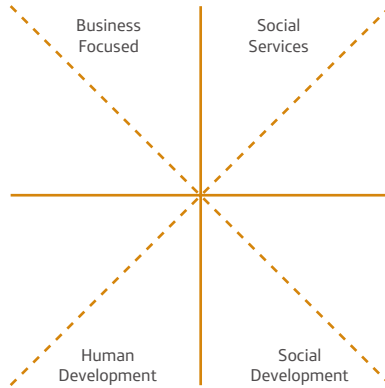
All of us can imagine where any one of these models might go wrong, where its dominance or the way it is carried out could do harm (or, at least, not do much good) both to the intended beneficiaries and to the company and its workers. That is not the fault of the model but of those in whose hands it rests.

If one value of a model is for us to place ourselves within it, to see where we fit, then it leads invariably to a questioning of whether that is where we *want* to fit and, if not, to where we wish to move and, ultimately, how we will get there.

| The Model          | The Key Concept             | The Characteristic  |
|--------------------|-----------------------------|---|
| Business Focused   | Adding value to the company | <ul style="list-style-type: none"> <li>• Helping achieve strategic business goals</li> <li>• Building employee leadership and skills</li> <li>• Creating, sustaining and managing corporate culture</li> <li>• Strengthening brand and enhancing reputation</li> </ul>  |
| Social Services    | Helping those in need       | <ul style="list-style-type: none"> <li>• Identifying target audience (e.g., people who are marginalized, poor, disabled, in ill health)</li> <li>• Focusing on delivering services</li> <li>• Aiming at alleviating immediate need</li> <li>• Often expressed as "charity"</li> </ul>   |
| Social Development | Changing systems            | <ul style="list-style-type: none"> <li>• Identifying target issues or problems</li> <li>• Focusing on building capacity and self-sufficiency</li> <li>• Aimed at changing underlying conditions</li> <li>• Building on existing assets at work on the target issue and/or the assets of the people affected by it</li> </ul>            |
| Human Development  | Empowering people           | <ul style="list-style-type: none"> <li>• Increasing awareness and knowledge of social realities</li> <li>• Aiming at building engaged, active citizens</li> <li>• Fostering personal development through volunteering</li> <li>• Demonstrating how people, individually and collectively, can change communities and society</li> </ul> |

Here is a quick way to gauge where you are. On this matrix, using the diagonal lines, mark the extent to which you think each model is a dominant force in shaping your volunteer efforts. The further out on the diagonal you go, the stronger the force. Then connect the dots – upper right to lower right to lower left to upper left to upper right.

The resulting shape will show you the relative weight each model carries for you.



Now consider these questions:

- Do you believe that where you are is aligned with your company's culture, values and priorities?
- Is this mix of models getting you the results you want?
- Is there a model that feels over- or under-represented for you?
- Is there a different mix that would potentially fit your company and your goals better?

These models can be a useful tool to share and discuss with your program management team. Doing the “where are we” exercise together is a great way to “create the moment and stimulate the dialogue.”

## Focusing on Change – The Latin American Priority

It was in Latin America that we saw the most significant focus on the social development and human development models. Companies were much clearer in their desire to bring change, not only ameliorate immediate need, and to develop active citizens for whom volunteering for change will become an integral part of their lives.

In her summary of the focused research on corporate volunteering in Latin America that she did as part of our project, Monica Galiano wrote:

Transformation rather than “help.” Exercising the right of participation rather than “doing good.” Latin America is engaging in real change through volunteer action... [It is] a region of continuing intellectual, societal, economic and political change.

That culture of change has played a significant role in shaping corporate volunteering since it was first introduced in the region some 15 years ago by multinational companies.

The target beneficiary population for volunteering no longer is conceived as dependent subjects to be protected, a hallmark of the charity obligation. Now it is about the defense of their rights and those of others, active and reciprocal citizen participation between equals.

**Gamesa Quaker** (Mexico) has a priority focus on sustainable development through nutrition. Their volunteers are ambassadors to combat malnutrition by building awareness of children about healthy lifestyles.

At **YPF** (Argentina), the focus is helping women on the margin enter the mainstream through micro businesses.

**Instituto Unibanco** (Brazil) volunteers are mentoring young people, ages 15 to 25 to help them develop the job-readiness skills they will need to obtain and sustain employment that will enable them to lead productive, fulfilling and empowered lives.

### Key Differentiators

We also identified what we called “key differentiators” – that is, ways of distinguishing a company’s approach to key operational areas. There are six and they are evenly divided between “control differentiators” and “expectation differentiators.”

The “**control differentiators**” indicate the degree to which a volunteer effort is controlled in its planning, management and execution.

**Control or chaos.** We ask companies to imagine – and now ask you to do so as well – a continuum. At one end is “centralized control.” At the other is “chaos.” Then we asked where they would put your volunteer effort on that continuum. Where would you?

Perhaps not surprisingly, no one wanted to go to either end of the continuum. After all, who wants to be seen as a totalitarian or an anarchist?

So companies tended to put themselves in the middle. But, when pressed, they generally had no problem identifying which way they moved from the middle and how far.

The flow of information played a key role in where companies placed themselves. Companies that leaned toward chaos tended to have less well-developed reporting systems, particularly ones that used quantifiable data, and lower expectations for reporting. Companies on the control side tended toward tighter reporting systems and higher expectations.

**Top Down or Bottom Up.** Here we were looking for an indication of from where the primary driving force for the effort comes as well as about how the effort is being managed. Is it driven from the top down and out through the system? Or is it more of a framework within which people throughout the system, both managers and volunteers, can establish their own priorities?

What is the balance between the two?

At **Eli Lilly and Company**, there are both “signature initiatives” and opportunities for local leadership. The former are organized and managed from headquarters. They include their Global Day of Service, a partnership with the International Federation of Red Cross and Red Crescent Societies to certify employees for disaster relief and their Connecting Hearts Abroad that takes some 200 employees a year on volunteer and cultural immersion trips. At the same time, throughout the company, managers have something of a “free rein” to create their own service projects without stringent reporting requirements.

**Ford Motor Company** is systematically building out a comprehensive global program. They envision that the “close to home” segment – that is in southeastern Michigan where their headquarters and the majority of their workers are located – will be tightly structured. But then it will become more balanced as it moves out through the system.

**Nature and Degree of Global Direction and Support.** What is the operational role of those charged with the global responsibility of their company’s volunteer effort? What resources and supports do they offer for implementation? Is it relatively high engagement with lots of supportive resources or relatively low, encouraging great autonomy?

A great example is **Standard Chartered Bank**. Alisha Fernandez Miranda, Senior Manager, Community Investment, told us, “We know that what we drive from the center doesn’t work.” While there is an increasingly strong corporate-wide framework for volunteering, including clear expectations for involvement, the planning and execution happens across the bank. Their global corporate affairs structure is “a resource, a connector to the community, not a detailed operator of activities.”

Similarly, **IBM** describes their company-wide volunteer efforts as “facilitated from the top, not controlled.” Their On Demand Community (ODC) leads the field as the model for online support of volunteering. It is the “home base” for the volunteer efforts of 180,000 registered employee and retiree users, over 40% of the total potential, from 84 countries. It is both a management tool and a resource center with approximately 200 tools, some in 17 different languages – state of the art online presentations, videos, Web site reference links, software solutions and documents, all designed to help volunteers work more effectively.

**How do you rate?**  
Rate yourself on each of the “control differentiators.”

**Control or Chaos**  
Where are you on the spectrum?  
Chaos ----- Control

**Top Down or Bottom Up**  
Where is the primary driver? What is the balance?  
From the Bottom ----- From the Top

**Global Direction and Support**  
How much direction and support comes from the global level?  
High Direction ----- Low Direction  
High Support ----- Low Support

The “**expectation differentiators**” are a reflection of the expectations a company sets for participation in, support for and management of its volunteer effort.

**Involvement.** In any environment, a critical factor in the success of a volunteer effort is creating and sustaining an environment that places high value on volunteering and that establishes an affirmative expectation of involvement.

For corporate volunteering, the question is the extent of that expectation. Is it high or low? Ed Martinez, Director of Philanthropy and Corporate Relations at **UPS**, told us, “We believe in and reinforce volunteering throughout the company... People are constantly reminded that you need to do good and that you will be better for it.”

They set a composite goal of three hours of volunteering per employee per year with performance reported and monitored through their Neighbor to Neighbor online portal

that allows employees to record hours volunteered by themselves and family members both in UPS projects and in their non-work lives.

Richard Hamilton, Director, Global Citizenship at **KPMG** in London called it “a given” that no matter where you are in the firm, you will be involved because “colleague pressure – from employees, clients and competitors – sets the expectation.”

While these two companies are not exceptions and there were many like them, a significant number of the global companies we interviewed would not have said the same for themselves. Rather, for them, expectations for involvement were low or not clearly articulated or inconsistent with the corporate culture.

Of perhaps greater importance, because of the way it ripples through a company, is the extent to which top executives and middle managers are expected to get involved in the community.

Perhaps because of our inherent skepticism, we did not take an indication that the expectation was high at face value. “But what would happen,” we asked, “if they or their unit was not involved? Would anyone notice? Would anyone care? Would anyone do anything about it?”

In many instances, the answer was clear: a person would not get to the level of global, regional, country or business unit leadership if he or she was not committed to community involvement, both personally and for the company.

**Inclusiveness.** Who is volunteering for in the company? Is it for all of the workers or only for some? Are there limitations based on job responsibilities or geographic location or on status within the company hierarchy? Is it for retirees, family, friends? For vendors and customers? We will discuss this issue further in Chapter 16.

### Hyundai Family Volunteers

**Hyundai** began its formal family volunteering program in 2008. It is a three month effort every year that begins in May (“family month”) in Korea. The Korean Council on Volunteering is the NGO partner, identifying opportunities suitable for families and making the actual connection through local Volunteer Centers. Hyundai promotes the opportunities online and provides uniforms for each family member. Children are welcome to invite their friends to join them.

**Management.** Do companies expect their volunteer efforts to be managed with the same rigor as other aspects of their business? An absence of that rigor has the potential

for those efforts to be taken less seriously, not seen as an asset to the company and, ultimately, be marginalized.

An excellent example is **Eli Lilly and Company** where, according to Sherrie Bossung, director of Community Outreach and Employee Engagement, it is clear that “employee volunteering has to be run like any other business activity. We have to continuously demonstrate value add to the company.”

When the company determined that the proposed plan for a global day of service qualified as a corporate initiative, it was required to go through the Six Sigma process just like any of their other corporate initiatives. The process is designed to be a cost-saving, efficiency measure that assesses processes and is metric based in order to answer the question, “What is the most efficient way to do the work?”

The process took four months; required market research with the company's international affiliates; and involved people from every functional area. Of particular long-term benefit to the volunteer program was the requirement for an executive sponsor from the corporate leadership council who then became one of its leading champions within the company.

**Standard Chartered Bank** is proactively moving toward applying the same management rigor to their sustainability (CSR) programs as they do to the rest of the business. For volunteering, that includes setting targets, collecting data and comparing results. Making data visible results in recognition for countries with high numbers and added encouragement for ones with lower numbers.

The Chairman-designated “executive sponsor” of volunteering, Steve Bertamini, CEO of Global Consumer Banking, has set a target of an average of 0.7 days of volunteering per year per person for those units that report to him. Monthly meetings of his direct reports include current volunteer numbers.

Overall, the greatest rigor in management of volunteering appeared to be in these three areas:

- companies with well-developed skills-based volunteering like **National Australia Bank (NAB)** and **IBM**;
- professional firms with a history of pro bono work, like **KPMG** and **Linklaters**; and,
- companies with well-established cross-border programs like **Pfizer** and **BD**.

All expect that these volunteer engagements will be managed at the level of their normal professional standards.

**How do you rate?**  
Rate your company on each of the "expectations differentiators."

**Involvement**  
What is the level of expectation for involvement by executives and managers?  
Low ----- High  
What is the level of expectation for involvement by employees generally?  
Low ----- High

**Inclusiveness**  
Who is welcome to participate?  
Limited, defined group of employees ----- All Employees ----- Employees Plus  
(Employees Plus includes some mix of retirees, families, friends, vendors, customers)

**Management**  
To what extent is volunteer effort expected to be managed like core business functions?  
Low ----- High

## Keys to Excellence

Over the 30+ years that "corporate volunteering" has been recognized as a definable field of endeavor, there has emerged a relatively stable set of core ideas that are generally accepted among practitioners.

Some of the ideas have been derived from research both in the United States and in other parts of the world. Many have come from years of sharing best practices among people within companies responsible for volunteering. Some are now part of "folk wisdom" and some may even be "urban myths."

Various forms of these ideas can be found in virtually everything written about corporate volunteering, in training materials, in the substance of questions asked on surveys, in criteria for awards, etc.

These concepts were further supported by the GCVC research. In our 48 interviews with global companies, we saw a connection between these concepts and the nature of their programs. Those that were the most well-established, most inclusive, most innovative and were perceived within and outside the companies as most successful – those companies embodied and reinforced these six concepts.

Understanding these concepts is a first step toward building a highly effective, sustainable corporate volunteer effort. They are also an important part of setting the stage for the balance of this book. In some form, they recur throughout.

- 1. The support of top leadership is one of the most critical elements of success. With it comes the opportunity to demonstrate that the company holds its volunteer efforts in high value.**

This is the element of success most often cited by companies. Those with sustained, well-organized programs, visible and respected within the company and externally, are invariably able to point to the sustained support of top leadership, often embodied by the personal interest and support of the CEO.

My own research on the role and meaning of volunteer service in the lives of CEOs made it clear that many of them believe that employee volunteering is an important part of the kind of corporate culture they are trying to create within their companies. Most also believe it is an important asset in recruiting and retaining the best possible employees.

When this kind of support is expressed by the CEO – through personal participation in the company’s volunteer activities, messages to employees, sponsorship of recognition programs for outstanding volunteers, reporting to corporate stakeholders, etc. – it can directly affect the attitudes of other senior leaders and of middle managers. It helps create an environment that says to employees that their volunteer involvement in the community is highly valued.

We will discuss this in more depth in the next chapter.

- 2. Sustained programs are rooted in established policies that are visible to and known by everyone in the company. These reinforce value and demonstrate that the programs are considered part of the company’s ongoing business operations.**

In many organizations, written policies create the framework that defines what can and cannot be done, particularly with regard to human resource management. Thus, it can be important to ensure that the company’s commitment to its volunteer efforts is codified within that same framework.

But it is not enough to get into the policy manual. It is critical that the policies be visible to and known by as many people in the company as possible.

A classic example of what happens when this is not the case can be found by looking at the status in some companies of “dollars for doers” programs that provide financial matches for hours volunteered. Almost without exception, program managers can point to the inclusion of these programs in the policy manual, often in great detail. But they also may confess that the opportunity presented by the program is not taken advantage of by many employees. Indeed, some will say that after the first surge of interest when the program

was launched, it has been little used. Why? Usually because it has been considered enough that the policy existed. There was little or no effort to continually remind employees of the policy or to proactively market the program to them.

That is why this concept is defined not only by the existence of policy but its continued visibility to employees.

**3. The primary outlets for a company's volunteer time, talent, and energy are its partners in the community. When strongest, these are not philanthropic relationships but true partnerships in which both sides participate in planning and execution for impact.**

While it is true that some companies can create totally self-contained volunteer opportunities for their employees, it is more often the case that companies must rely on NGOs to provide those opportunities. Indeed, in many cases, companies look to them to fully manage the engagement of their employees.

There also is a strong argument that companies **should** rely, for support of their volunteering, on NGOs that bring knowledge of community problems, demonstrated effective responses and strong volunteer and project management capacity.

The companies that are most successful at building strong, sustained volunteer programs are those that have developed real partnerships with the community. Partnerships are characterized by consciously recognized mutual benefit, attention to the process of their work together, and joint planning, learning, and evaluation.

We will discuss this in greater depth in Chapter 10.

**4. Successful companies bring the same quality of management to their volunteer efforts that they use in their core business operations. They are aiming to maximize the impact of their work for the community and the personal benefit to their employee volunteers.**

Too often, corporate community involvement is forced to the margins of the company. They are "It is nice but not necessary" and may be in constant danger, particularly during difficult economic times. One characteristic of marginalization is that the company does not manage it in the same way it does its core business activities. To be blunt, it is not worth the investment required to do so. As a result, the benefits of volunteering are not only undervalued but often invisible.

In the companies with the strongest volunteer programs, the goal is to have a positive impact in the community, in the lives of the employees who volunteer, and in the company itself. There is recognition that the best way to achieve that is through the same kind of good management practiced throughout the

company.

- 5. At the heart of that effective management is a commitment to continuous improvement. By actively learning from their employee volunteers and from their community partners, companies can steadily improve performance and increase value.**

Excellence and high impact are built on a commitment to actively learn from experience and to put newly developed knowledge to work in the interests of continuous improvement. A company's volunteer efforts provide ample opportunities for feedback and learning – from upper and middle management, from employees who volunteer and from those who do not, from the community organizations that employees volunteer for, from recipients of the services provided by employee volunteers, and from “third party” observers in the community.

Feedback from these sources can verify for the company the benefit of its volunteer efforts to the community, to its employees, and to the company itself. It can also provide data that, when properly organized and analyzed, can help improve the process and increase the impact of those efforts. The companies with the most successful programs are constantly seeking ways to improve.

- 6. Leadership companies go beyond themselves to provide leadership for volunteering at the local, national and even international levels, enrolling their stakeholders and bringing more and more companies into active engagement with their communities.**

Companies with truly “world class” volunteer efforts have a deep commitment to the community and to society. They recognize that what is good for their employees, their communities, and for them as a company is also good for others. As a result, they step up to visible and active leadership in promoting volunteering generally and corporate volunteering specifically – within the communities in which they do business, the larger business community, and society generally.

Such work may begin with opportunities for employees to invite their families to participate with them in company-sponsored volunteer activities. It may expand to include outreach to the company's supply chain and to its clients or business customers. For some, it may include creative efforts to engage consumers or even the general public in company-sponsored activities. It also happens when representatives of the company accept leadership roles in a local “corporate volunteer council” or with a local “volunteer center” or when top leaders respond to calls from elected officials to lead new community involvement efforts within the business community.

## Closing Thoughts

There is no “best way” to do corporate volunteering. It is highly situational, shaped by the realities of what is desirable, appropriate and feasible for each company.

In practice that means that volunteer efforts must be based on knowledge of the company – its culture; its operating style; its priorities; the nature of its business, its workforce and its stakeholders; its commitment to community involvement and volunteering.

There are, however, as we have outlined, some important keys for excellence. Given all of the variables, it would not be possible for every company to rate high on every one of them.

Don't let the elusive “best” be the barrier to the acceptable “good.” Figure out what makes sense for your company, what fits your goals and realities – and get to it!



## Chapter 9

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# The Impact of Culture and Leadership

One of the reasons corporate volunteering is seen as an asset by NGOs is that they see in companies a defined group of potential volunteers with established internal communications systems and a shared sense of purpose. In other words, they see a **community**.

Like any community, there is a wide diversity of people, personal beliefs and attitudes. But they do have, at least while in the workplace, shared culture, values, behavioral norms, policies, practices and priorities. All of those affect corporate volunteering as much as they do any other aspect of corporate life. All, in turn, are shaped by company history, leadership and the ongoing internal dynamic interactions.

In this chapter we will look in more depth at the role of corporate history and culture in shaping a company's volunteering, the importance of support from the top, and at how their personal involvement benefits corporate leaders.

### History and Culture

#### "It's in our DNA."

Heard it once, heard it twice, heard it over and over again in our interviews with global companies.

For fully a quarter of them, it actually was demonstrably true that commitment to community involvement, social responsibility, philanthropy and volunteering can be traced back to their founders.

From perhaps the oldest, what is now known as the **Tata Group**, to the newest, **salesforce.com**, there is a direct line from the philosophies and values of the founders, whether an individual or a family, to today's ongoing commitment and action.

The box "Learning Tata-ness" explains the unique role that engagement with the community has played for over 140 years and is now an integral part of Tata Group, the largest private corporate group in India, one with operations in some 80 countries.

**Salesforce.com** is less than a tenth the age of Tata but its model of "integrated philanthropy" – with the company contributing 1% of product, 1% of equity and 1% of employee hours annually – has been there virtually since the beginning, the creation of founder Marc Benioff. Employees get four hours of released time per month or six days per year to volunteer. With over 80% of employees participating, the company believes that employees come to the company wanting to be part of this philosophy.

### Learning “Tata-ness”

“In a free enterprise, the community is not just another stakeholder in business, but is in fact the very purpose of its existence.”

Those words from Jamsetji Tata, founder over 140 years ago of what has become the Tata Group, are at the heart of what is internally called “Tata-ness.”

It is a corporate ethic, an expectation, an imperative, a way of being so deeply rooted in the corporate culture that while it must be learned, it can't be taught. It is the reality of people who keep on doing and others who keep on emulating, a continuous learning from one's own experience and from the stories of others.

For the Tata Group, the starting point is the needs of society. Support for society is why the company exists. While great attention is paid in many companies to developing the business case for CSR, for Tata, CSR *is* the business case.

It is even reflected in the ownership structure of Tata, the largest private corporate group in India – 114 companies with operations in 80 countries. It is 66% owned by charitable trusts with a roughly equivalent share of the profits channeled back into the community. This fits the corporate belief that what comes from the people is returned to the people many times over.

Volunteering at Tata, then, is very organic, enmeshed throughout the company, not added on. It is a bottom-up form of engagement, driven by employees. There is no need for a formal mandate from the top. Rather, the goal is to build an enabling environment for volunteering throughout Tata, one in which there is an expectation of involvement, one that gives people tremendous responsibility to identify needs, develop responses and take action.

Central to this is the work of the Tata Council for Community Initiatives, a Group-level organization that facilitates participatory networking, aggregation of good practices, active learning from experience and cross-company exchange of ideas, challenges and solutions.

In some companies, volunteering directly embodies prevailing corporate values. Thus, the stated aim of the volunteer efforts at **SK Group** in Korea is “to make it possible for those who are in need of help to lead their own lives for themselves by empowering them using our specialties.” That grows directly from the personal belief of founder Chey Jong-Hyun in the importance of helping people become more self-sufficient.

Volunteering also can be directly tied to managed change of corporate culture. **Ford Motor Company** is an excellent example.

Henry Ford founded and grew his company through focusing on building better cars. He also believed in building better communities. Continuing family leadership for the company has sustained that legacy throughout Ford's 100+ year history.

Since 2006, the legacy, embodied in their volunteer efforts, has been an integral component of the planned culture change, initiated and driven by CEO Alan Mulally, which focuses on “One Ford – One Team, One Plan, One Goal.”

When Janet Lawson arrived in August 2006 as the newly hired director of the Ford Volunteer Corps, she found a variety of volunteer efforts underway, most secure in their own internal silos with little tying them together other than that they were in the same company.

Her goal became to pull the disparate existing efforts into a single strategic program that would cut across those silos and reinforce the One Ford focus.

Today, Ford's program includes:

- The Global Week of Caring that in 2010 involved 12,000 people in 41 countries in almost 200 projects;
- Ford Model Teams, created as people from across the company respond online to project opportunities from NGOs with which Ford has developed sustained partnerships;
- Quarterly Seasons of Service centered around children and families, the environment, community building and basic human needs;
- A software system built to company specifications that supports the entire effort.

The program is pointed to by Ford executives as exemplifying the new One Ford culture.

At **GE**, volunteering is considered to be an "organic part" of the company, the result of a culture that has evolved over time. This shared culture sustains the commitment across very different business units and very different ways in which employees volunteer. It has spread through:

- shared assumptions of desirable corporate and individual behavior,
- company-wide communications,
- leadership at the regional, country and local levels,

all reinforced by support from the very top.

Support from the top is critically important – whether it is to sustain the heritage of founders, managing culture change, creating a new culture or standing behind one that has become "organic" – not only in these examples but throughout corporate volunteering as a whole.

In the next section, we will take a look at what support from the top looks like and why volunteering by CEOs and other executives is good not only for their companies but also for them personally.

## The CEO as Volunteer

The support of top management has been recognized as critical to the success of corporate volunteering since the earliest days of the field.

In the 1979 *Volunteers from the Workplace* report (Allen et al. 1979) we wrote:

The single most important factor in the success of an employee volunteer program is the interest and support of top management and, in particular, the chief executive officer. This theme was repeated over and over... by corporate managers and volunteer coordinators, by community agencies and by the employee volunteers themselves.

In our follow-up 1985 survey of companies, 83% of the almost 300 companies responding listed “CEO support” as the most important element in their volunteer programs (Vizza et al. 1986).

Twenty-five years later, in the interviews we conducted for the GCVC research, we heard the same message repeated over and over: **The active engagement and support of top leadership is critical to the development and sustainability of a company's volunteer efforts.**

Here are just three of the numerous great examples of that leadership about which we were told.

Irene Rosenfeld, CEO of **Kraft Foods**, was among the first to sign up for the company's inaugural global Delicious Difference Week of service. Well known for her personal passion for volunteering, she aims to get 100% involvement from her executive team. In 2010, she volunteered to help build a playground in Chicago and to serve food to the homeless in the United Kingdom, the latter reinforcing the value of the history of volunteering Cadbury employees brought into Kraft in the merger of the two companies.

Her quote on the company website reinforces the corporate culture and praises the work of the employees. “I'm so proud of our employees. We've touched the lives of so many people. While giving back has always been an important part of our company culture, our people went all out this year to make a difference in the communities where they live and work” (Kraft Foods 2011).

Expansion of the volunteer efforts at **Standard Chartered Bank (SCB)** “is a passion project for the CEO and top management” as they see it as a way to increase community investment and as an employee benefit. Steve Bertamini, CEO of Global Consumer Banking and a member of the Management Committee, was tasked as “executive spon-

sor" to expand the scope and increase the numbers. He, in turn, has set targets for his direct reports and established a system to provide data for monthly review meetings. Recognition for countries with high levels of participation is significant, including calls from the CEO and participation in management and leadership forums.

As a featured plenary speaker at the 2011 IAVE World Volunteer Conference in Singapore, Mr. Bertamini said this about his own volunteering:

If you can get someone to volunteer once, you stand a good chance of making it a lifelong habit. People rarely fail to be moved by the experience and I include myself in that.

My daily work becomes more meaningful, because volunteering demonstrates that a business can be about more than the profit it makes; it can be a force for good.

At **UPS**, Scott Davis has been a visible champion of the company's volunteer efforts internally and has been personally active externally. He issues an annual "call to action" to the global management team encouraging participation and has set an example by personally participating in the company's annual Global Volunteer Month. As part of his external representation role, he has been involved in several high profile fundraising campaigns for leading NGOs.

Just as important, we heard that "top leadership" needs to be understood in the context of today's global companies. Today, it is not simply "the CEO" but top management as a whole, including leaders of business units, regions and countries, whose support is needed. Four companies – one European-based with extensive Latin American operations, two of Korea's largest conglomerates (chaebols) and one of the world's largest U.S.-based – offer excellent examples of how it happens for them.

At **Telefónica**, the presidents of the company's four primary operating units – Telefónica Digital, Latin America, Europe and Global Resources – issued a joint video invitation to all employees worldwide to join them in the company's International Volunteering Day. Their enthusiasm and personal participation, not only for the Day but for the company's broader commitment to volunteering, has encouraged continuing evolution and innovation in those efforts. In 2011, for example, employees in China and India participated for the first time in the day, taking it upon themselves to organize their own project.

**Samsung** launched its globally branded volunteer program, "Happy Together," in 2004 as part of its "management of sharing." Through weekly meetings, the CEOs of all of the Samsung companies came to understand and agree with the philosophy and policy – and, now, participation among them has become somewhat competitive. The CEOs

are responsible for their own personal volunteer involvement and for promoting volunteering in their respective companies.

Samsung believes it is the “power of the policy” as carried out by top leaders that has led to a 90+% participation rate among their employees in Korea.

The SK Volunteer Group is made up of CEOs from each of the major **SK Group** companies. It is an officially centralized organization, formed in 2004, with both top-down and bottom-up programs. There is a clear Group mandate that all SK companies have volunteer activities. The Group reports through the Office of Corporate Contributions to the SK chairman, Chey Tae-Won.

Paul Bueker, director of GE Volunteers, says that “it sends a powerful message to both groups” when the **GE** Corporate Executive Council, the top 30-40 company leaders, uses part of its September meeting each year to recognize outstanding GE volunteers from around the world. CEO Jeff Immelt’s belief that “volunteering is part of being a good leader at GE” sets an affirmative expectation that not only people at the top but those coming up will get involved.

**The Case for CEO Engagement.** University of Chicago psychologist Bernice Neugarten (1968) once wrote this about executives:

Where... can we look for concepts to describe the incredible complexity shown in the behavior of a business executive, age 50, who makes a thousand decisions in the course of a day? What terms shall we use to describe the strategies with which such a person manages his time, buffers himself from certain stimuli... sheds some of his “load” by delegating some tasks to other people over whom he has certain forms of control, accepts other tasks as being singularly appropriate to his own competencies and responsibilities and, in the same 24-hour period, succeeds in satisfying his emotional and sexual and aesthetic needs?

Why would such men – and, now, gratefully, an increasing number of women – make time in their complex lives to be volunteers? What role does it play in their lives? What meaning does it have for them?

For my doctoral research, I set out to answer those questions by interviewing the then current or immediately retired CEOs of eight major companies based in the United States and England – Atlantic Richfield (ARCO); British Petroleum; BP Chemicals; Grand Metropolitan (now Diageo); Honeywell; IBM; Time Warner; and Xerox.

As I listened to their stories, I learned a great deal about their lives, their families, their views of the world, and their values as well as about what influenced their volunteering

and how they perceive the personal and professional benefits of that involvement (Allen 1996).

Although the research is now 15 years old, it sheds light on the people who today occupy these very unique positions, the men and women who, like those described above, are continuing this legacy of leadership for their companies' volunteering.

It also clearly establishes that volunteering plays a variety of roles in both their professional and personal lives.

**Non-Work Influences.** My eight CEOs helped me identify four factors outside their professional lives that influenced their volunteering:

- A family history of community involvement, whether or not overtly identified as “volunteering,” helped build in them a habit of helping that they sustained throughout their lives.
- Personal exposure to human and social problems – in some cases through their own children; in others, experiences from their childhood or even early in their adulthood – helped sharpen their understanding of community needs.
- Religious and political beliefs (across the spectrum from progressive to conservative) and what one called his “general ethical framework” both informed the nature of their volunteering and helped them understand it in a context of a larger sense of values.
- There was a sense of obligation to “pay back” society for the success they achieved and to fulfill the expectations they set for themselves.

**Work-Related Influences.** There were two primary work-related influences for the CEOs' volunteering.

The first was the influence of **corporate culture**. There is strong support in management literature to suggest that executives are more influenced than anyone else by the culture of their company, in part because of their likely longevity and thus extended exposure to it and in part because expectations of their behavior were set from the top and, as they advanced, from below as well. The higher they went, the more invested they became and thus more influenced by the culture.

The CEOs I interviewed talked about being part of “a company with a conscience;” “a culture that encouraged involvement;” “the good fortune of growing up in a corporation which felt... that participating in one's community... was a fundamental responsibility of a good citizen and good employee.” They described legacies and philosophies and the engagement of their predecessors as examples. They could recall stories of specific

moments during their career when it became clear to them that the company expected them to be involved in the community.

For most, their companies rewarded their involvement, consistent with the expectation established by their culture. One said his community service distinguished him from one of his rivals for the top job. Another said that his involvement “was one more attractive attribute of an individual, and the lack thereof was a negative.”

Expectations of the **external role** of CEOs was the second work-related influence. CEOs are the public manifestation of the company, often charged with growing and nurturing high priority external relationships, dealing with government officials, serving as the most visible and credible spokesperson.

Being a CEO also creates a unique set of expectations for their involvement in community service.

Peter Drucker (1974) believed that these expectations are the natural result of the success of business and its leadership:

The price of success for management... will be very high... We will be expected – as a result of our success – to give leadership and direction in the major problems that face the community.

Because of their roles and the status that comes with them, unique opportunities for the personal involvement of CEOs and other executives arise. They can leverage their positions and the resources of their company to increase the potential for them to have the kind of impact they expect of themselves.

**The Return on Their Investment.** There are two broad benefits to CEOs from their personal volunteer involvement.

- It is an effective tool to help them fulfill their work roles and meet the expectations of the company and society,
- It meets the needs and expectations of their personal lives.

Let's look at both.

**Fulfilling Work Roles.** One of the most critical roles of the CEO is to shape, sustain, and renew the culture of the company. For the CEOs in my research (Allen 1996), part of that was maintaining the culture that had led them into community service. They felt an obligation to sustain those expectations throughout their leadership tenure.

Dick Munro, retired CEO of Time Warner, was clear on this point when he spoke of the importance of CEO support for community involvement:

I... think it's critical for a CEO. He's got to set the tone. The people will still look to the corner office and figure out what you do, and what you do they do. Because they figure that's the way they are going to get your job.

If you get a CEO who is totally disengaged from the... social environment, that's a bad omen for him and the company.

They also believed, from their perspective as evaluators of others' talents, that community involvement is a critical asset for upwardly mobile employees to have. One said that it demonstrates that someone is "broad based" and that its absence puts "a ceiling on where the person would advance." Another believed that community involvement is reflective of the "same characteristics that made us activists" in business.

Community service is also a legitimate and accepted mechanism to fulfill part of their expected external role. It can be good public relations for the company and can build important external relationships that would benefit the company. As one of my CEOs said, "Participating in the community is probably the best way to create a relationship with people."

Elliott Jaques (1989), organizational psychologist and management consultant – and the person who introduced the concept of "mid-life crisis" – suggested a larger, more strategic business benefit.

He argued that the more complex the organization and its environment, the longer the time horizon and the greater the cognitive complexity required of its leadership.

Thus, he believed that CEOs of global companies must work with time horizons of at least 10 years. If true, then such a capacity helps CEOs understand the institutional interests of the business in a way that naturally leads to community involvement.

If they are looking that far ahead, they must be considering the host of environmental factors that will affect the viability of the business. If they are fulfilling their obligation to the company, it is incumbent on them during their tenure to address the issues likely to threaten the company over the long-term. This may be illustrated most clearly by the number of business leaders who commit significant time to issues related to education and workforce development and those who have led their companies into a focus on sustainability in response to climate change.

**Meeting Personal Needs.** There were two specific ways in which volunteering met the personal needs of the CEOs.

First, just as family history, personal experience and personal values influenced their volunteering, so too did their volunteering help fulfill the expectations set for them by their families and that they set for themselves. When they committed time to community service, they were acting to fulfill those expectations.

Second, volunteering was meeting their developmental needs, consistent with theories of adult development, particularly for people in “middle age” or “midlife.” At the core of that development is the concept of generativity, “a sense of continuity with the future generation... [and]... attempts at immortality by directing efforts toward activities and products that will leave memories and traces” (Gruen 1964) and “responsibility for the growth, leadership and well-being of one’s fellow creatures” (Vailant 1977).

Daniel Levinson (Levinson et al. 1978), a pioneer in adult development, believes that “altruism is, in part, a vehicle of the search for immortality.” In midlife, he believes, people “care more about the well-being of [their] community.”

The desire to leave something behind, particularly the interest in developing younger people, is a clear part of generativity. In my study, all of the participating CEOs were extensively involved in volunteer activities involving children and youth. Nor were all of those activities from the safe distance of policy-making boards. Their volunteering included serving as mentors, hosting urban children in the summer, coaching, and working directly with neglected children.

Volunteering was a way for the CEOs to bring a sense of wholeness to their lives. But, let’s let their own words on the value of their community involvement make this point (Allen 1996).

**Lod Cook**, then CEO of ARCO. “The word that comes to mind is fulfilling. It’s enriched my life... I’ve been very, very fortunate to be with a company that supported the notion of community involvement... The business itself is terribly exciting... and certainly would have kept me challenged and interested. I wouldn’t have been one-dimensional, but I certainly wouldn’t be as multi-dimensional as I think I’ve been able to be by having this experience outside the company.”

**Robert Horton**, then CEO of Railtrack and former CEO of British Petroleum. “... a balanced life is actually an important concomitant of being a successful businessman. I simply do not believe that people who don’t have a lot of other interests can be really successful businessmen. The multidimensional nature of one’s life is a very important part of building a personality...”

**John Akers**, former CEO of IBM. “I think it is part of the job... and in that part of the job, I felt rewarded by it... I met people I otherwise would not have met. I was

exposed to American life that I otherwise would never have seen. I would have had a diminished life had I not been involved in it.”

### Move to Action

Here are some of the implications of this research for those responsible for organizing volunteering within a company who want to encourage and influence involvement by their CEOs and top executives.

- CEOs want meaningful work to do and they want to feel that they personally have made a difference to a valuable, respected organization or in the solution of an important community problem.
- They prefer specific projects that have clear goals, are achievable and in which there is a clear, realistic role for them.
- Even for those with deep commitment to community involvement, it is by necessity an “add on” to their job – thus their time is limited and must be well-managed.
- They like to be in situations where they can make useful external contacts, build relationships, work with their peers.
- They want to work with NGOs whose leadership knows what they are trying to do, have a realistic plan for making it happen and are able to communicate both clearly.
- It is never too late to get a CEO involved; “late bloomers” may be willing and able to do more than those who are already overcommitted.

# Implementing for Impact

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# Chapter 10

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## Building Strong Partnerships with NGOs

There was a time, not so long ago, when NGOs (or, as some call them, nonprofit organizations) were tolerated *participants* in corporate volunteering, places to which companies could dispatch their volunteers to “do good.”

Those days are well and happily gone. The value of NGOs as *partners* in corporate volunteering has grown steadily, opening new possibilities for companies to increase impact internally and externally and for NGOs to gain access to new resources that can help them accomplish their missions.

This chapter is devoted to the dynamics of those partnerships, looking from both sides at their value, the challenges to their success and the ways that the likelihood of that success can be maximized.

### The Elephant in the Bathtub

Some years ago, I had the opportunity to lead a workshop on how to develop partnerships between NGOs and businesses. One of the participants was a woman from California who was the executive director of an NGO that had been particularly successful in working with business. When I asked her to describe for the group what it was like to be in partnership with business, she immediately replied, “It’s like there is an elephant in my bathtub!”

When we pressed her a bit on what she meant, she continued along these lines: “Well, it seems like a good idea at the beginning. The elephant can give us a nice shower and we can scrub parts that it can’t easily reach. A good deal for both of us.

”But then the problems start to show up. It really is pretty crowded when an elephant gets in your bathtub. It’s so big and you’re so small by comparison. Pretty soon you feel like the elephant is hogging the tub. There’s a lot more of it to wash – and it can be pretty demanding about how you do it.

”And you have to be constantly alert that it doesn’t start lurching around without warning. You have to be prepared that it might just get up in the middle of the bath, shake itself off and walk away.”

You get the idea.

Now, neither she nor we are saying that it’s *not* a good idea to invite an elephant into your bathtub. But if you are going to do it, you need to do it with care, you certainly need to pick the right elephant, you need to settle in advance who scrubs what how, and you really should do the necessary remodeling to accommodate both of you comfortably.

Just as importantly, the elephant has to take responsibility, too – making sure it doesn’t sit on its bathing partner, doesn’t splash too much water around the bathroom, explains

clearly just what it needs help washing and what it doesn't and is careful about when and how it exits.

Translation (in case you don't get the idea):

For partnerships between businesses and NGOs to succeed, there must be a mutual commitment to open communication, joint planning and assessment, learning and feedback to one another.

Companies must seek to understand and be comfortable with the goals, the current priorities, the existing capacity and the requirements of NGOs.

NGOs must understand and be comfortable responding to what companies are seeking in their partnerships, particularly in terms of supporting the professional and personal development of their employee volunteers.

David Warshaw, who for five years was responsible for GE's volunteer efforts and is now a private consultant, runs a workshop titled "Companies are from Mars; Nonprofits are from Venus." He is probably not far off in the differences he sees between the two.

But the communication gap is narrowing rapidly as each party recognizes the strengths and the needs of the other, how they can learn from one another and how, together, they can increase their collective impact.

It takes work, it takes investment, on both sides, but it happens.

### **From Useful to Essential**

In 2007, the United Nations Global Compact partnered with the *Financial Times* and the Dalberg Global Development Advisors to learn more about business-NGO partnerships and to rate NGOs, UN agencies and other non-business partners from the perspective of business.

The results clearly show the increasing value business places on these partnerships (Dalberg 2007):

- 61% had engaged with non-business partnerships over the preceding three years; 88% of those who had not engaged expressed interest in doing so;
- 73% believed that these partnerships would be important or extremely important to them in the coming three years.

When asked the reason for the partnerships, the majority indicated it was to assist in successfully implementing their CSR programs and their desire to build trust with their stakeholders.

Partnerships with NGOs, it is now understood by the companies we interviewed, offer opportunities for companies:

- to leverage the commitment of their people, money, expertise and representational strength to make a greater impact on issues of importance to them; and, at the same time,
- to assist their partners to achieve their mission-driven goals.

In our research, we learned that whether at the global, country or local level, companies expect their NGO partners to have certain characteristics that maximize their potential benefit to the company. These include:

- a demonstrated relevance to company priorities;
- a presence in the places where the company is or wants to be;
- solid organizational infrastructures that offer the potential for replication and scaling of projects;
- expertise on issues of importance to the company;
- ability to manage projects on behalf of the company as an outsourcing asset;
- opportunities for employee volunteer engagement in the organization's work; and,
- a willingness and the ability to provide opportunities for employees to develop new knowledge and skills.

Interestingly, of the list of possible responses in the Dalberg question on the reason for partnering, the lowest rated by respondents was "to gain insight from know-how of the partner."

Yet, in a series of articles derived from the release of the report, the *Financial Times* quoted representatives from two companies who supported the value of the knowledge of their NGO partners about "local community needs and who are the key players... [how to] make connections and get the services to those that need them... expertise on the ground" (Murray 2007).

In 2010, *The Economist* also made the case for what companies can learn from NGOs. They rely heavily on the book *Zilch: The Power of Zero in Business* by Nancy Lublin, founder of Dress for Success, an NGO that provides clothes for low-income women to wear to job interviews. She now heads DoSomething.org that promotes activism by young people. (Check out the book at [www.zilchbook.com](http://www.zilchbook.com) and her work at [www.dosomething.org](http://www.dosomething.org).)

She argues that the way most NGOs in the world survive is by being highly efficient, by motivating workers and by marketing effectively, all lessons she believes that busi-

nesses can learn from them. Not enamored with the term “nonprofit,” she points out, “We’re not a not-for-profit, as we’re not even trying to make a profit.”

A key motivator for NGOs to learn to market effectively, then, is that “they have to persuade people to part with money for goods or services that are used by others.” She believes the keys are long-term relationships, regular contact, expressions of gratitude for support and reporting on activities and results.

*The Economist* (2010a) concludes, “For too long, for-profit firms have focused on learning only from each other as they try to do better. It is time that business started to tap the valuable know-how of the best nonprofits rather than dismiss the whole lot as hopelessly inefficient.”

## From Global to Local

The global companies we interviewed have built partnerships with a broad array of global NGOs that, in some way, align with corporate interests, whether because of compatibility of goals or of location. These most often are the NGOs with which companies create “signature initiatives” that bring the company the greatest overall visibility. Taken as a whole, they represent what one company termed “best in breed” organizations that have high credibility with companies. In many of these global partnerships, volunteering plays a relatively limited role.

*Global priorities ultimately must be balanced by the need for country and local managers to respond to local needs and priorities. It is at the local level that most corporate volunteering plays out.*

A great example of a global partnership that leverages the breadth of a company’s resources, including employee volunteers, is Seeing is Believing at **Standard Chartered Bank**. It is one of a portfolio of partnerships with NGOs that also includes HIV/AIDS education, women’s empowerment and malaria prevention. Seeing is Believing is profiled in the accompanying box.

### Seeing is Believing

Seeing is Believing began when **Standard Chartered Bank** (SCB) celebrated its 150<sup>th</sup> anniversary in 2003 and asked its employees how it should celebrate. The answer was that the company should make a significant contribution to the community. As a company serving primarily Africa and Asia, the bank chose a problem, visual impairment, that has devastating economic impacts in those continents.

Seeing is Believing is the result. It is a partnership with the International Agency for Prevention of Blindness and 13 of the leading eye care NGOs in the world to make new money available to support on-the-ground interventions. SCB committed to a 1:1 match of all money raised. To date, over \$30 million has gone into programs benefiting over 23 million people.

SCB employee volunteers lead many of the fund-raising efforts, including events for their clients and a “gala” in New York City. Employees also can donate the “last hour” of their salary at the end of the year. SCB’s private bank makes the campaign available as a philanthropic offering for their clients.

There is also an expectation that the NGO partners will open themselves to SCB volunteers, perhaps to serve in eye care clinics and conduct eye tests in schools. In Dhaka, Bangladesh, for example, some SCB volunteers used their skills to help upgrade the IT systems at Islamia Eye Hospital while others assisted doctors and accompanied patients to and from the hospital.

A 2008 eight-country internal survey of employee opinions on the program showed that 44% had been personally involved and that 87% see it as closely linked with the SCB brand.

But for every highly visible global partnership, there are literally countless local partnerships that stretch from the headquarters city to the furthest corporate outpost.

Global priorities must ultimately be balanced by the need for country and local managers to respond to local needs and priorities. It is at the local level that most corporate volunteering plays out. Local NGO partners are vital assets in helping ensure successful implementation and meaningful impact.

This was reaffirmed by one of the findings in the Dalberg research in which almost two-thirds of the partnerships identified were local but where partnerships that included both local and global activities were most highly rated by the responding companies.

Here is an example from our research.

All volunteering activity in **Telefónica** is carried out with the participation of an NGO. The company considers the origin of any volunteering activity to be a social need and NGOs the entities best placed to identify and act on that need. Partnerships with NGOs also ensure the volunteering activities are part of a wider social program that is sustainable over time.

Telefónica employees have the opportunity to partner with an NGO of their choice to compete for funding for a project that addresses a real problem and fits their interests and the NGO’s priorities. While specific rules for the competition vary from country to country, the core ideas remain the same. Employees are responsible for working with the NGO to develop a proposed plan, budget and evaluation component. The focus must be on social problems and on projects that are sustainable. The higher the level of proposed employee volunteer involvement, the greater the chances of winning.

To maximize the quality of proposals, Telefónica provides training for employees in four countries on how to develop projects and make presentations.

In the focused research on Latin America done by our colleague Monica Galiano, she discovered that almost half of the 29 companies in the region that she interviewed have some form of “project contests” in which employees can put forward ideas for volunteer projects to be undertaken with company support. Among the most prominent of these were **CEMEX** (Mexico), **Souza Cruz** (Brazil) and **HSBC** (Brazil).

## From Philanthropic to Transformational

As recognition of the value of partnerships has grown, their nature has evolved as well.

The traditional business-NGO relationship was philanthropic – that is, it was a generally one way giving of money or other resources from the company that “had” to the NGO that “had not,” what James E. Austin of Harvard Business School described as being based on a “charity mindset” (Austin 2000).

Austin posited three levels of relationships. The “philanthropic” evolved into the “transactional,” in which there is a “significant two-way value exchange.” For NGOs, that often translated into having to guess the right answer to the company’s question, “What’s in it for us?” Initially the correct response was most often some variation on “visibility.” Corporate expectations have grown, as we have seen, and the answers have become more complex.

The third level of Austin’s hierarchy is what he calls “integrative” or “transformational,” characterized by “strategic alliances... deep mission mesh.” In essence, company and NGO are so closely aligned around a shared mission that they create a virtual third entity that transcends each of them, a deep integration of planning, acting, learning and changing as they move to meet the single set of goals that brought them and keep them together.

### Is it a relationship or a partnership?

This chart shows the key differences between what we would consider a relationship and a partnership of companies and NGOs.

| Relationship |                       | Partnership    |
|--------------|-----------------------|----------------|
| Low          | Engagement            | High           |
| Peripheral   | Mission               | Central        |
| Smaller      | Resources             | Larger         |
| Narrow       | Scope                 | Broad          |
| Infrequent   | Interaction           | Intensive      |
| Simple       | Managerial Complexity | Highly complex |
| Minor        | Strategic Value       | Major          |

We learned in our study that a critical step in building strong partnerships is often to change the existing dynamics between company and NGOs. Here are two companies that have worked to do that.

At **Ford Motor Company**, "They [NGOs] don't work for Ford, Ford works for them," said Janet Lawson, director of the Ford Volunteer Corps.

Now over 100 NGO partners have their own individual vendor codes, allowing them access to Ford's in-house volunteer management system so that they can directly put their volunteer projects onto a master calendar available to Ford employees.

First implemented in Southeast Michigan, home to Ford headquarters and a high percentage of their employees, the online system is targeted for a phased roll-out worldwide. The goal for Ford is to build long-term relationships with their NGO partners.

**National Australia Bank (NAB)** recognizes a somewhat similar challenge, "to educate business units that we are here to serve the community, not for the community organizations to meet our needs."

NAB has key relationships with 10 local community partners that provide 25% of all of the volunteer opportunities offered to their employees. They represent a broad range of missions and activities – education, working with children and youth, workforce development, human services and the environment.

Both for these 10 and the other 350+ NGOs that offer 75% of the company's volunteer opportunities, NAB offers capacity-building workshops and extensive support on how to effectively apply for and manage skills-based volunteers.

**American Airlines** is an interesting example of how corporate volunteering can lead to the creation of new NGOs that remain in a very close, possibly transformational, partnership with the company. The story of their "volunteer entrepreneurs" is found in the accompanying box.

### The Volunteer Entrepreneurs of American Airlines

**American Airlines (AA)** employee volunteers, with AA's encouragement and support, have played lead roles in creating new NGOs to pursue their priority interests.

Medical Wings International was founded in 1998 by a 25-year employee of American Airlines who had seen, through her travels, the reality of children's needs for health care. With the help of other airline employees and the support of AA, the NGO organizes medical missions to take doctors, dentists and other medical personnel to remote areas of Latin America, the Caribbean and Asia.

Airline Ambassadors International, founded by an AA flight attendant, has grown from airline employees using their travel privileges to help others into a worldwide network of active airline employees, retirees, families and others who volunteer in a variety of humanitarian programs – escorting children to hospitals for medical care, participating in trips to deliver food, school supplies and other in-kind donations, bringing building technology to areas vulnerable to natural disasters.

In 1996, AA employees created Something mAAgic as a grass-roots campaign to support the Make A Wish Foundation and to complement the company's partnership with the foundation. It now also supports Give Kids the World Village in Florida, a "wish destination" for many children with life-threatening illnesses and their families, and other children's wish-granting organizations. AA employee volunteers lead the foundation and organize the volunteer activities – fundraising to support the wishes, helping prepare the wishes and participating in delivering the wishes.

### **Attention Companies: Nine Rules for Building the NGO Partnerships You Want and Need**

There is no guaranteed formula for success but here is a solid set of guidelines to consider.

1. Know yourself well enough to know the strategic and tactical alignments that are most important and most appropriate for you.
2. Be clear about what you are trying to achieve for your volunteer effort through your partnerships, whether you want opportunities for mass mobilization or very targeted skills-based or executive involvement.
3. NGOs cannot fulfill expectations they do not know you have. Develop a checklist of your expectations for your partners – and ask them for the ones they have for you (and take it seriously).
4. Remember that, unless it is explicitly their mission to do so, NGOs do not exist to serve companies. Understand the added costs that partnering with you will bring – whether that is organizing a one-off project for your day of service or making sure there are ongoing learning opportunities for your employee volunteers – and be prepared to help meet those costs.
5. Open yourself to what you can learn from your NGO partners – about the issues on which they are working, about the communities and the people they serve, about how they do their work, about your own company as seen through their eyes.
6. Plan to do joint planning. Partnership means working together from the beginning, not from midway through.

7. Communicate, communicate, communicate. Yes, it takes time. But it is one of the best investments you will make.
8. Differentiate your relationships, lay out guidelines for how you will handle each and be transparent about them with your partners. Some likely will be only philanthropic, some transactional. Some will be short-lived (the day of service group). Others will be ones you want to nurture over time. It is only fair to let your partners know where they stand. It does not enhance your reputation to let an organization believe there is more to your relationship than you ever intend there to be.
9. If you are going to be the elephant in the bathtub, be a polite and gracious one and don't make too much of a mess.

### Attention NGOs: What You Need to Know to Build the Corporate Partnerships You Want and Need

**Be Volunteer Friendly.** Some years ago, based on research I had led at the Points of Light Foundation, I formulated the concept of “volunteer friendly organizations.”

NGOs: the first step to building strong, mutually beneficial and sustainable volunteer-based partnerships with business is to *be* a volunteer-friendly organization.

While the concept and the thinking behind it are much more detailed, the essence of it can be boiled down to these five questions:

1. Are you strategically committed to the effective engagement of volunteers?
2. Does the work of your volunteers contribute directly to achieving your organizational mission?
3. Are your staff ready, willing and able to manage volunteers effectively?
4. Have you identified and removed barriers to effective volunteer participation in your organization?
5. Will you listen to and learn from your volunteers?

If the answer to **any** of these questions is “no,” then you have some preparatory work to do before you even try to partner with a company.

If, by some extreme chance, your answer to **all** of these is “no,” then, frankly, your challenges likely go well beyond anything a partnership can fix!

**Know What You Want.** The second biggest complaint from companies about NGOs seeking their involvement is, “They either don't know what they want or they don't

know how to tell us what it is.” (The first complaint is poor management of their employee volunteers.)

There is a reason that “the bottom line” is important in corporate settings. It starts at the top and trickles all the way down. CEOs survive “information overload” by developing perceptual filters that allow them to focus on the most important information needed to make the decisions required of them. That approach is mimicked throughout companies, particularly by those who may be overwhelmed by requests from outside the company, as are most who are responsible for volunteering, philanthropy and community relations.

NGOs are famous, in the corporate mind at least, for wanting to relate their entire history, all of their programs, everything anyone could possibly want to know about them. Companies want to hear enough to understand your mission and priorities. They need to know what you want from them and its value to you, to the issue you are addressing and to their company. If you pass the threshold test, you will have plenty of chances to tell them more as you enter into dialogue and, hopefully, partnership.

**Know What They Want.** Here are seven major things companies want in their partnerships.

1. **To know they are making a difference.** They want to believe that their involvement with you has value and impact and they want it to be true. Help them do it and prove it.
2. **To see results.** Their success is constantly measured and quantified. Be prepared to explain the metrics that enable you to know how well you are doing and what impact you are having.
3. **Efficiency.** For them, time is money. They want the greatest value for their effort and the greatest return on their investment for the least work possible. Demonstrate your own efficiency of operations.
4. **Learning opportunities.** Be prepared to provide and support opportunities for employee volunteers to refine their existing work skills, to develop new ones and to build their leadership ability. If doing this makes you uncomfortable, be clear about that from the beginning of your discussions.
5. **Good management of their people.** See “biggest complaint about NGOs.” Companies believe that they can manage their people better than you can manage their people. It also is about making sure that they don’t have unhappy employees who will never volunteer again and will influence others in the workplace. Be prepared to demonstrate your organizational skill at project management and volunteer management.

6. **Brand enhancement.** Visibility and third-party endorsement are important. Reputation is critical. Make sure their partnership with you will enhance that reputation. Make them proud of their association with you.
7. **Optimum return on their investment.** Impact in the community; employee volunteers' satisfaction; an asset in achieving their business goals. Bottom line: be clear how you can help them achieve that through their partnership with you.

**Are You Ready?** In Appendix A, you will find 28 statements with three response choices: generally not true for us; mostly true but could be stronger; completely true for us. Make a copy, sit down with the appropriate people in your organization, both board and staff and perhaps some line volunteers, and complete it.

The point is not the “score” although that in and of itself will give you some insights. Rather, use it as a tool to create your own “moment” and stimulate your own dialogue about whether or not you want to be in partnership with businesses.

### Closing Thoughts

First, partnerships between businesses and NGOs are valuable not only to the partners but also to their respective stakeholders, including the communities of which both are a part.

Second, that value can be maximized through careful planning and focused attention on the process of building and managing the partnership.

Third, virtually any business and any NGO can enter into a partnership and, through both commitment and hard work, make it a success.

### Move to Action

Like any relationship worth having, partnerships take commitment by both parties to:

- clearly communicate expectations and work out the ones that maybe can't be met together;
- be honest about the resources that are needed to get the agreed work done;
- identify and discuss differences and problems as they arise;
- jointly evaluate both the process and the outcome of the work;
- give each other honest, supportive feedback;
- be open to learning and change;
- develop and gracefully execute a joint exit strategy when the time comes.

# Chapter 11

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## Learning by Doing

**Volunteering is an incredible way of developing fundamental competencies with the group, because doing voluntary work involves a highly complex environment.**

**Volunteering provides employees with the opportunity of showing how well they can work and of becoming leaders in the company.**

**Volunteering connects them with something that was lying there dormant and that was unperceived by the company.**

*Luiz Covo, C&A Institute, Brazil*

There is a bit of a temptation to stop now and allow the insightful comments of Covo, one of the brightest global stars in the management of corporate volunteering, to stand on their own.

But to do so would not do justice to his insights and what rests beneath them nor to the challenges they present to companies.

In this chapter, we will move from understanding the belief in volunteering as a means of skill building and professional development to a confrontation with reality and then on to an exploration of how we can ensure that those benefits are realized.

### **Benefits Meet Reality**

In Chapters 5 and 6, we cited studies and used anecdotal examples to support the belief that corporate volunteering is an asset that helps employees refine existing skills and develop new ones, to work more effectively in teams and build their capacity for leadership as well as to gain new knowledge that benefits them professionally.

But how does the reality of what companies actually do in this arena match the professed belief in this particular benefit of volunteering?

In the 2007 Deloitte study that surveyed millennials, there was a clear gap between respondents' expectations and what they perceived companies were doing. While 74% believed volunteering should be used for professional development, only 28% believe their companies do that.

A year later, Deloitte (2008) surveyed a random sample of 250 Fortune 500 human resources managers. The results:

- 91% of respondents "agree that skills-based volunteering would add value to training and development programs, particularly as it relates to fostering business and leadership skills."

Yet, only 16% of companies made it “a regular practice to intentionally offer skills-based volunteering opportunities for employee development.” Of those that did, it was only available to all employees in 13% of them rather than just to management employees.

Those findings are supported by one of the major conclusions of our interviews with global companies:

The professed belief by companies of the strategic value of their volunteer efforts is far greater than their actual investment in systematically seeking to maximize that value.

The relationship with Human Resources (HR) is critical to whether or not this investment is made. For every company that described a positive relationship with HR, there was at least one in which HR did not recognize nor act significantly on volunteering as an asset to support their work. In the accompanying box, there is a bit more on what we learned from global companies in our interviews with them.

### The Partnership with Human Resources

HR is the prime example of the kind of horizontal partners that can maximize the likelihood that volunteering will be taken seriously as a strategic asset, particularly to achieve employee engagement and development goals.

Ideally, all would be like the **Tata Group** where the HR heads of their companies “see volunteering as a quiet, effective, cost-efficient way to develop talent.”

But that is not always the case. For every company that described a positive relationship with HR, there was one or more where HR did *not* “get it;” HR policies and practices have “stymied progress” or made it “very complex” to do something like a “day of service;” or volunteering simply is not seen as an asset for personal and professional development.

How have positive partnerships been built? In most cases, it was the result of persistent work, careful crafting of a persuasive business case, finding common ground to work together and keeping HR involved.

A key to the successful development of the new **Starbucks** Community Service Program has been to “make friends across the company.” Staff responsible for building the program put a priority on developing internal support across company functions. They invited input from a broad variety of units and, equally important, let those who contributed know how their ideas were incorporated into the final program design. This required a willingness “to be vulnerable” by inviting and being receptive to critique and change as ideas were shared and refined.

The **Monsanto** Foundation, as it was laying the groundwork for its new approach to volunteering, worked closely to build the internal partnerships it needed, particularly with the HR leadership team. Initial meetings to review policies and information to be distributed to employees set a strong foundation that has been sustained through periodic updating and joint problem-solving.

Here are other examples:

- **Kraft** – the head of HR is the executive sponsor of their Delicious Difference Week;
- **State Street** – Corporate Citizenship and HR now report to the same executive and are working together to identify development opportunities for employees at all levels;
- **Pfizer** – the Chief Talent Officer is an advocate for the value of skills-based volunteering as a talent development opportunity;
- **Disney** – they are looking at new ways to collaborate with HR to integrate volunteer opportunities into all Disney businesses to help develop employee skills.

**Volunteering as Complement, Not a Replacement.** Perhaps some of the resistance of HR professionals may simply be that they perceive volunteering being touted as a low cost replacement for traditional corporate training and development programs, thus a threat to them.

It needs to be said clearly that volunteering is NOT a replacement. Rather, it should be seen as complementary, as a tool, a vehicle through which some training and development objectives – not all, *some* – can be met.

As an example, being the biggest company in Korea, **Samsung** needs employees who can communicate effectively with communities. Volunteering with NGOs complements in-house training programs to enhance professional competencies, especially negotiation and communication skills with external audiences.

Another example is **National Australia Bank (NAB)** and how it works to manage the expectations of business units about what they can get from volunteering. For example, units may be trying to substitute volunteer projects for other team-building activities they might undertake. The corporate volunteering staff might instead steer them toward a design that would have half a day of service and half a day of other team-building work.

**An Ethical Issue?** There is a final, not often discussed, aspect of reality that must be considered. As we posed in our discussion of the social case for corporate volunteering, is it the job of NGOs who receive corporate volunteers to ensure that company expectations are met for learning, team-building and leadership development?

**First**, is it fair to an NGO to encourage an employee to use a volunteer opportunity to practice skills that the company will not let them use in the workplace?

I recall an architect telling me once that volunteering gives their younger employees a chance to learn to be project managers, “an opportunity to do things that they would wait years to do in the firm.”

That leads to a whole host of questions that the setting we were in did not allow me to ask. How do you prepare those employees for these assignments? How closely do you supervise or monitor their work? What liability do you feel if/when they make a mistake?

Perhaps most important, what degree of transparency is there with the NGO? Are they told that they are getting someone who is going to learn on the job with their project? Is the NGO given the clear opportunity to say “no thanks” – and, if they do, is the firm willing to find an experienced person to take on the project?

What may look like a great learning opportunity for under-experienced employees may be, for that NGO, a critically important project. At the very least, they need to understand what they are getting and what to expect as a result.

**Second**, is it appropriate for businesses to expect that NGOs will divert other resources into fulfilling those expectations, thus reducing their capacity to meet their primary missions? Is it appropriate to evaluate the worthiness of an NGO as a partner based on whether or not it has the skills, capacity and willingness to provide training and development services for the company?

More than one company has been shocked at the idea that it should pay NGOs for such services. “After all,” the response goes, “look at the great talent they are getting. Why should we pay them to take it?”

The reality is that if companies are going to gain maximum benefit from volunteering as a strategic asset for workforce development, they need to invest in it – with appropriate internal staff to manage volunteering, with insistence on the active, positive support of HR, and with appropriate financial support for their NGO partners to enable them to successfully meet expectations.

## Closing Thoughts Up Front

Not surprisingly, the corporate volunteer activities that have the greatest impact for the community, the volunteers, and the companies that sponsor them are those that are well-conceived, well-planned, and well-managed. Similarly, programs intended to be a resource for learning are most beneficial to companies and employees when they are based on sound design and management. Here are some key ideas to maximize success. It will be helpful to keep them in mind throughout this chapter.

- **BUILD COMMITMENT TO LEARNING.** Begin with the commitment to use employee engagement as a resource for learning – and then follow-through on that commitment with appropriate strategic and operational planning. Identify changes in policy and practices that may be needed to turn those plans into reality.

- **RECOGNIZE THE COMMUNITY AS A PLACE OF LEARNING.** That means stepping away from the belief that business “knows more” and accepting that nonprofit organizations, government agencies, and grassroots groups can contribute to the knowledge, skills, and leadership capacity of employees who engage with them.
- **COMMIT RESOURCES TO STIMULATE AND MANAGE LEARNING.** Team-building happens not just because people work together but because they have the opportunity to reflect together on their experience. People who identify their learning needs and purposely find volunteer opportunities that help fill those needs gain much more. Companies that actively seek to capture insights from employees’ experiences in the community can learn how to improve some of their business processes.
- **BUILD LEARNING PARTNERSHIPS.** Build sustained partnerships in the community that can support your learning goals. Remembering that the primary purpose of volunteering is to serve the community, it is essential that those learning goals remain secondary. Often with the help of a third-party “broker,” it is possible to identify partners who recognize and will support the multiple benefits of employee involvement.

### Adult Learning

Adults have different learning styles. Some of us learn by watching, some by reading structured content, some by trial and error, some on our own and some through group interaction.

This is a critical principle to bear in mind when designing team-building and learning opportunities related to volunteering.

David Kolb from Harvard University is the definitive authority on learning styles – indeed, some reading this book will have taken his Learning Styles Inventory just as they may have taken the Myers-Briggs Type Indicator for insight into personality types. Kolb (1984) identified four basic learning styles:

- **Convergent** – characterized by abstract conceptualization and active experimentation; the strengths of this approach are problem solving, decision making and the practical application of ideas.
- **Divergent** – emphasizes concrete experience and reflective observation; the strengths are imaginative ability and awareness of meaning and values, the ability to view concrete situations from many perspectives.
- **Assimilation** – abstract conceptualization and reflective observation; the strengths are the ability to assimilate disparate observations into an integrated explanation; less focused on people and more on ideas.

- Accommodative – emphasizes concrete experience and active experimentation; its greatest strength is in doing things, carrying out plans and tasks and getting involved in new experiences.

If you want more on this, your human resource development professionals will be well aware of Kolb's work.

The essential points for us are:

1. None of these learning styles is "right." They simply "are." People differ in their learning styles and thus in their behaviors.
2. People seek out situations that are compatible with their learning style. Some will welcome reflection periods; others will abhor them. Some will jump in and get to work; others will step back and figure it out; others will debate what it means. This is as true in their volunteering as it is in their paid work.
3. Great teams typically have a mix of learning styles. As you can see from the descriptions, when any one or two are dominant, it can lead to very different results.
4. To be responsive to employees' learning styles is to demonstrate respect for them as individuals and for the different strengths they bring to the task at hand.

## Enhancing Knowledge and Skills

Learning and skills development happen in the multitude of settings through which people move every day of their lives, whether planned or spontaneous. Certainly it is an aspect of volunteering regularly cited by virtually all volunteers, from "Wow, I learned something new today," to "That volunteer training program taught me a new skill that I did not realize I could master," to "My volunteering gives me a new perspective on the way other people live and the challenges they face."

For companies that want to leverage the opportunity volunteering provides for learning and skill development, the greatest success likely will come when those outcomes are intentionally built into their volunteer efforts.

The best learning will result from consciously structured opportunities that include appropriate preparation, relevant assignments and reflection time.

Here are some tips for enhancing personal learning through volunteering:

- Keep participation in company-organized volunteering optional, not a requirement.
- Create tools that help workers identify their learning needs and find volunteer opportunities that will contribute to filling them.

- Make opportunities available to all, not just some, employees. Restricting access undercuts team-building benefits.
- Encourage employees to record experiences and skill development as a way of enhancing internal resumes.
- Make the experience part of formal employee records and internal resumes.
- Build partnerships with those community groups that are willing to support volunteers' learning. Be prepared to support your partners with the resources they need to do a good job for you.
- Build learning opportunities around programs that make a real difference to communities.
- Balance group-based activities with opportunities for individual involvement – different people will respond to different options.

**Providing the Tools.** An important approach is to provide employees with tools that help them use volunteering for their personal development and skills-building.

For example, **KPMG's** U.S. Employee Career Architecture (ECA) is a comprehensive set of online resources and tools that enables employees to look at their current roles and potential career options and identify the skills and competencies needed to pursue them. Just as relevant, ECA includes volunteering as one of the ways an individual can acquire those skills and provides examples of the types of volunteer roles that can help build careers.

Here are other tools that we have seen companies develop and use over the years:

- **Worksheets** to help identify learning needs
- **Checklists** of competencies or specific skills to target for development
- **Tables** that relate competencies and skills to specific volunteer opportunities
- **Briefing notes** to prepare employees to meet with community agencies seeking volunteers
- **Maps** to guide them through the process
- **Evaluation forms**

**Recognizing the Results.** While there may be inherent value in learning or developing new skills, it is critical, in the context of the workplace, that there be some recognition of the results so that there is an institutional memory of employee achievements. It is great for today's manager to recognize that an employee has developed new skills through volunteering but not so great if that is not recorded in some way that future managers will know about it.

At **IBM**, employees can use volunteering for the company's certification or re-certification in skill areas, but it is not part of the individual's performance plan. It is considered skills enhancement and thus is not part of the annual evaluation, though it is a very important part of employee development.

If, as some companies reported (see Chapter 6), a personal history of volunteering influences decisions about hiring and promotion, then it is incumbent on companies to create an appropriate institutional memory that employees know is as stable as their permanent work record.

Indeed, in some companies, employees are encouraged to add their volunteer experience to their internal resumes and it is made part of their formal employee records. They may not be formally evaluated on whether or not they volunteer, but the facts of their volunteering are there.

### Employee Development Questions

Employees benefit from help in deciding how to use volunteering for their individual development needs. Key questions all prospective volunteers should be encouraged to answer include:

- What do you see as your talents that help you do your job well?
- What types of tasks best utilize these talents?
- What do you see as your most important development needs and/or skill gaps?
- Why?
- Are there areas in which you think you need additional technical or skills training?
- If so, which?
- What type of job do you see yourself doing five years from now?
- What types of input will enable you to reach that goal?
- What kinds of volunteering would interest you?
- What other types of projects or tasks would you be interested in doing?

This list was adapted, almost 10 years ago, for an article I wrote on employee learning through volunteering, from Unilever's Employee Development through Community Service Toolkit. Unilever based its program on one which was originally developed by Helene Curtis which was purchased by Unilever in 1996.

## Professional Development

The way in which we use "professional development" here transcends skills development and moves instead into the realm of the whole person. That is, it encompasses the knowledge base from which we work; our personal values, self-awareness, and emotional intelligence; our adaptability to new people, situations and locales. It is spiritual and

conceptual as well as practical about having a clear sense of our place in the larger world and of how our actions and interactions ripple out through our environment.

Certainly “leadership” is part of that. But it is not only the specific skills of leadership, it is about learning to *be* a leader.

Professional development is about personal growth. People grow when:

- circumstances cause them to innovate, to do something new;
- they must adapt to new surroundings;
- change is sudden and unexpected;
- they cannot fall back on their usual support systems;
- they are challenged to do something out of their comfort zone;
- their existing skills are tested and must be adapted to unfamiliar conditions;
- they fail.

Many things in life and work offer those opportunities for growth. Some, not all, forms of volunteering certainly qualify.

Here is an example from our research.

**UBS** has partnered with the Swiss Charitable Association for almost 20 years on the Changing Sides initiative. Designed as part of UBS’ training program in advanced management skills for middle managers, it places participants in a week-long “layman’s social support role” in schools, prisons, welfare agencies, a mental hospital, an Alzheimer’s center, homes for seniors, etc. It is intended to “take people out of their comfort zone,” and concludes with a debriefing about the experience and how it applies to management, asking questions like, “What is success when you are working with people who are dying?”

Managers are given the opportunity to learn from new interactions in new settings that were likely unfamiliar to and probably at least initially uncomfortable for the participants.

This example likely fails the test of whether participation is voluntary as it is a set part of a formalized management training program. But it incorporates a key feature important to those organizing volunteer activities for professional development – **reflection**.

Here, reflection takes the form of debriefing and the challenge to apply the experience to management. Imagine the thought that has to go into answering that single question, “What is success when you are working with people who are dying?” Imag-

ine how that experience – not just the service given but the reflection on it and the response given – would stay with you. It would put a whole new light on the rather mundane decisions managers are called on to make throughout their careers.

Reflection is a key component of experiential learning. It has long been one of the essentials of service-learning for young people – prepare for the work, do the work, reflect on it, put the results of the reflection to work.

Chris Jarvis (2011) of the RealizedWorth (another one of those two words together brands) consultancy in Toronto, whose ongoing blog on corporate volunteering is always interesting and challenging, reminds us that “no reflection means no benefit.”

Here is another example, this one from my memory banks and earlier work.

Some years ago, **Diageo** in London had a program that “twinned” their executives with the executives of NGOs for mutual learning and mentoring. The key concept was “mutual.” The “twins” met six to eight times a year, sharing experiences and alternative approaches to action, focusing on long-term strategic issues and immediate projects and challenges.

This example points to the “**mutuality**” of the experience. Here, there was recognition that the corporate participant could learn from the experience of the NGO counterpart. It leveled the playing field, at least in concept and design. But part of the challenge to both parties was to make that leveling a reality – for the corporate participant to be open to learning from someone coming at their work from a different perspective, for the NGO participant to face into whatever trepidation there was to enter into that kind of dialogue with a corporate counterpart.

Here is a final example, also from our research on global companies.

“Team builds” are important at **SAP** for both team-building and as opportunities to assess, in a different way, outside the office, their “volunteer ambassadors,” who are often recruited from the top 10% of employees rated by performance and potential. Each project is initiated by an “executive sponsor,” working through the Corporate Social Responsibility staff that consult on operational details and help find a community partner. They also help sponsors prepare to do reflection and debriefing with the participants.

A key here is **executive involvement**. SAP deliberately seeks out “fast track” employees to serve as their on-the-ground volunteer leaders, bringing presumed competence, leadership skills and credibility to their volunteer efforts. Those ambassadors have the opportunity to perform under the watchful eye of an executive in the company – and to be assessed on that performance – raising the stakes considerably beyond the success of the project itself. Enough importance is placed on reflection and debriefing that corporate staff prepare the executive sponsors, not the ambassadors, to lead them.

It also underscores the point that people don't stop growing just because they reach the "top" (or somewhere near it) professionally. As we saw in Chapter 9, engagement in the community can be an important, ongoing part of both their professional and personal lives.

Their developmental needs are different and the realities of their lives limit their options. Finding opportunities for them to volunteer – not only symbolically in the annual "day of service" but in substantive roles that align with their interests and make good use of their skills and networks – is an appropriate challenge not only for those managing corporate volunteering but for those responsible for executive/professional development in the company. *That* is a partnership well worth developing.

### Contributing to a Learning Organization

One of the reasons I was so anxious to interview **Tata Group** for the research was a statement I read in one of their publications (Tata 2008):

The biggest take from organizing volunteering is the learning employees bring from the community after having understood the deeper issues. It is very important to distill this information and then communicate it across the organization.

The facilitators have a major role in this, by sharing stories on not only what the volunteers did but also on what they learnt from the whole experience of volunteering.

There are great instances where it is evident that volunteering can impact the way a company approaches or does business, this learning is very critical to the whole concept of "sustainability."

Tata was one of the very few companies in the study that could point to conscious efforts to learn from their employees' volunteer experience, to bring that learning into the mainstream of the company and to put it to work on behalf of the company.

Some of that learning might be termed broad-brush background that informs the business in ways that might not be immediately evident.

For example, when **Telefónica** volunteers work in after school programs and in support of teachers and social workers in their Proniño initiative in Latin America, they learn about the realities of life in those communities and of the educational system through which the young people are moving. Over time, the company can gain new insights that can help them improve their approaches to workforce development, recruitment and training.

Some of the learning may have specific application within the business.

At **Fujitsu**, everything begins with the “Fujitsu Way,” an articulation of vision, values, principles and code of conduct and how those elements relate to business policy. They are committed to “Green IT” which contributes to creating a prosperous, low-carbon society. Volunteering is one of the ways employees can embody those ideals. For the company, volunteer activities are important on their own, but it is more important that “employees understand how to use their volunteer minds to create green products. Through volunteering, employees will have a point of view that affects their work.”

Other examples:

- **Pfizer** has explored ways to purposefully learn from their Global Health Fellows and what they observe and learn. One business unit head challenged the Fellows at their orientation with three things to look for in their time away and to return with feedback for him.
- **Dow** has at least one example of product development work that originated from the experience of one of their Sustainability Corps volunteers in Kenya.
- At **Ford Motor Company**, the idea came from their volunteers for mobile pantries that respond to the food needs of newly unemployed people in areas without food banks or feeding programs.
- **Standard Chartered Bank** shares volunteers' stories across their banks because local knowledge is critical to business success.

What became clear across the 48 interviews, though, is that learning from employee volunteers in ways that help the company is still in its infancy. This is an important untapped resource that deserves greater attention.

Learning by the company needs to be well-conceptualized, well-planned and well-managed to get the maximum return on the company's investment.

### Move to Action

Here are seven ways to get the most learning for the company.

1. Make it **clear management policy** to use volunteering as a way of building the company's knowledge of the community.
2. **Let employees know** that the company hopes to learn from their experience – while making their sharing of experiences, insights and lessons learned optional, not mandatory.
3. **Identify issues of key concern** to the company and develop opportunities for employees to work on those issues as volunteers.

4. Develop **mechanisms and methodologies** to learn from employees' community involvement – focus groups, debriefing sessions, after-action reports, online surveys, employee blogs.
5. Find ways to **communicate the learning** to the people who most need to hear it – probably those in management but also in product development, communications, marketing, external relations, etc.
6. If the learning is used to affect company policies or practices, let employees who volunteer know so that they are **reinforced by having their sharing valued**.
7. Consider volunteer opportunities in organizations that the company already supports financially as a way to **evaluate the impact**, in terms of company learning as well as other company and community benefits, of that support.

# Chapter 12

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## Skills-Based and Cross-Border Volunteering

Two forms of corporate volunteering – one that dates to the origins of the field but that has been re-energized and one that is “cutting edge,” – are, now, the “hottest things” in the air.

In this chapter, we will look at skills-based volunteering (SBV) and cross-border volunteering. We will examine their virtues, their potentials and the limitations that threaten their acceptance and growth across the field.

The two are closely related, as cross-border volunteering is virtually always skills-based. We know of no company likely to support the movement of its volunteers across an international border to participate in a day of service, for example, unless that border is right next door and easy to step over. Thus, much of our discussion about SBV also applies to cross-border efforts.

### Skills-Based Volunteering

Present at the beginning, always done, now rediscovered, renewed and integrated into today's strategic approach to corporate volunteering – that's the basic story of SBV.

It was initially labeled “loaned personnel” but the way it was described still generally fits:

Businesses everywhere make a practice of loaning the skills, talent and time of their employees to a wide range of public [government] and private [NGO] agencies. The individual has a chance to demonstrate skills and to learn; company and community profit alike from the talents that are put to use to better the social and physical environments (Allen et al. 1979).

Today, proponents of SBV argue that it should be at the core of how companies and their employees volunteer. Their advocacy has raised the visibility of SBV, increased interest and led to new knowledge about why it is beneficial.

It also has raised anxieties, as some companies have recognized that it does not fully meet their needs or the interests of their employees and may require an investment beyond what they are prepared to make. As one company we interviewed put it, “The SBV train is leaving the station and we aren't on it.” Yet, they really aren't sure they should be, want to be, can be.

There is a risk that SBV, certainly an “inspiring practice,” is being deified as a “best practice” simply because it is an increasingly visible “popular practice.”

**What it is.** SBV is the conscious use of professional, work and personal skills in one's volunteering. Increasingly in articles being written about SBV, it is differentiated from

“traditional volunteering” or “hands on” which is presumed to be work that does not require specific skills and certainly not professional ones. This, of course, is a patent distortion of what volunteering has always been.

It leaves the impression that before the current generation “discovered” SBV, the only volunteering in the world was painting fences and planting trees – although, I am chagrined to report, both take actual skills that I personally don’t possess as can be seen by the state of my garden!

Some descriptions of SBV further limit it to work that builds the capacity of the NGOs served. Logically, then, it would limit the range of skills that would fall within SBV. As we argue below, this is a critical strategic error as it narrows the potential benefit of SBV to community, volunteers and companies and may undermine employee support.

Allen Consulting Group in Australia (no, not me), in a 2007 report prepared for National Australia Bank, identified several “modes of activity to build capacity and transfer skills.” The basic ones:

- One-off projects – easy examples: facilitate a planning session; teach staff how to improve their use of social media; listen to a problem and give advice;
- Regular ongoing commitments that allow volunteers to allocate short time periods – they give mentoring as an example; Junior Achievement might be another; or, projects that require more than one engagement, such as managing an NGO’s strategic planning process;
- Participating in the governance of NGOs by serving on boards of directors or similar bodies; and,
- Full-time secondments to an NGO – that is, the temporary transfer to a job or post within an NGO to fill a specific role or to complete a major project on their behalf.

**Is it volunteering?** This question has plagued the field for decades. Is it “volunteering” if the company essentially assigns a person, hopefully with enthusiasm on their part for the assignment (but perhaps not), to do a full-time job for an NGO?

Certainly one can argue, as many have over the years, that in this case it is the company itself that is volunteering, not the individual.

On the other hand, it is possible to change the dynamic and open up to employee self-nomination opportunities for secondments or similar assignments – by making visible available projects and the skills required to complete them and ensuring that participation does not threaten employment status.

We will discuss definitional issues more in Chapter 16.

**Why it is popular.** There now is a general consensus on the value of SBV as:

- A way for companies to increase their impact on specific problems;
- A capacity-building resource for NGOs and communities;
- A way to engage employees that leverages their workplace skills;
- An opportunity for employees to practice their existing skills and learn new ones.

As Diane Melley, director of Corporate Citizenship and Corporate Affairs at **IBM**, told us, SBV is what they encourage “because it is what is most valuable to the community and most valuable to employees.”

**Introducing some reality.** Deloitte is a leading and effective advocate and an eminently qualified role model for SBV. Interestingly, it is in their Volunteer Impact Surveys that we confront some of the realities and limitations facing the spread of SBV.

In their 2006 study (Deloitte 2006), they interviewed both NGO leaders and “white collar” (office and professional) American workers. Both groups recognized that workplace skills are highly valuable to NGOs. Almost 90% of NGO leaders see those skills as extremely or very valuable to them; 77% agreed that their organization could benefit from “corporate volunteers focusing on business practices improvements.”

There were similar results in their 2009 survey (Deloitte 2009) in which 97% of NGOs surveyed agreed when asked whether “you could increase your organization’s social impact if you could get contract or consulting resources on a pro bono basis.”

It would appear that the market is there. But...

... in the same 2006 study:

- over 60% of NGOs surveyed indicate that they do not work with any companies that provide volunteers;
- only 12% of them “typically align tasks with specific workplace skills;”
- only 19% of the volunteers surveyed say that their workplace skills are their primary volunteer contribution;

... and, in the 2009 study;

- 24% of NGOs surveyed had no plans to use skills-based volunteers or pro bono services; and,
- 50% of corporate grant makers (the people with the money) do not offer skilled volunteers to NGOs as a form of support.

Why the gap? The 2009 survey offers some interesting answers.

The first may be captured in the memorable phrase, “Show me the money.” The study found that NGOs think first and primarily of financial support as most important for them to receive. On the other side, although 80% of companies surveyed give financial contributions, only half do SBV.

Deloitte (2009) also discovered that “nonprofits and corporations are better equipped and more culturally aligned to solicit and manage cash gifts than volunteers.” Volunteer managers in the NGOs surveyed had less experience than their fundraising counterparts; almost a quarter of them had no one responsible for volunteer management. “More than half (57%) of nonprofits say they do not have the infrastructure in place to effectively deploy an influx of volunteers.”

If this is the case in the country that is supposedly the most advanced in volunteering, it does not bode well for the rest of the world.

**Internal corporate barriers.** In our interviews with global companies, we identified four barriers within companies to increasing the amount of SBV.

1. **Employee Interest.** “My employees don’t want to use their skills when they volunteer. They want to plant trees and do other one-off projects.” Variations on that were not uncommon observations from participating companies. Employees may prefer activities that develop new non-work-related knowledge or skills, that build new social connections or that provide them with personal satisfaction – but neither use their workplace skills nor relate in any way to their daily work.
2. **Resource Requirements.** To work most effectively and to have the greatest impact, SBV must have some form of dedicated case management to build partnerships with NGOs that will accept and manage the volunteers, define projects, shape specific opportunities, select and prepare volunteers, and ensure satisfactory completion of the committed work. That requires a significant investment for companies, whether done in-house or outsourced to intermediary NGOs or consultants, and puts a significant SBV program out of the reach of many companies. Read the box “How NAB Manages SBV” for a great example of how SBV can be implemented by building the capacity of partner NGOs.
3. **Time Limits.** When SBV is done within the framework of released time policies, there are limits, based on the time available, to the kinds of activities that can be undertaken and to what can be accomplished.
4. **Size Limits.** Because of resource limitations, it may be possible to offer SBV opportunities to only a relatively limited number of employees.

Here, we want to add a fifth barrier: **limiting the definition of a skill**. It is easiest for companies to think immediately of employees in white collar positions – and probably only a fraction of those – as the ones with skills that can make an impact in the community or for an NGO.

The effect of narrowing our view of applicable skills is to run the risk of narrowing the pool of potential volunteers and limiting the overall involvement of employees who can volunteer. In the long run, that will erode employee support for a company's volunteer efforts as too many are left on the other side of the fence, as observers.

Read carefully “What is a skill?” in the box below. As you do, reflect on how you think of the skills available in your company that can be made available to NGOs.

The observation by a company that “we are still trying to get our heads around the model” does not suggest that SBV does not have high potential for future development. But it does underscore the reality of the challenge to make it a broadly implemented practice.

Sadly, given the “hype” and the attention SBV is receiving, there is a very real danger that companies will choose to focus their resources on it, sacrificing other volunteer efforts that engage a broader range of employees.

### What is a skill?

Or, more accurately, what are employee skills that can have an impact in the community? They are not always professional and technical skills. Consider these examples:

**Disney** is well aware that *all* skills have the potential to benefit the community. They can imagine animators helping teach children to draw, or their “talent” appearing at a community event, or theme park landscapers helping spruce up the grounds of an NGO.

At **Marriott**, much of their volunteer efforts are aligned with their business – providing shelter, meals and jobs in a healthy environment. The skills their volunteers bring, whether they are engineers volunteering with Habitat for Humanity or hotel managers serving on the boards of local nonprofit organizations, are the same as they bring to their work in the company every day.

Employees in **C&A** stores bring their competency as salespeople, helping organize NGO clothes sales and bazaars, teaching the organizations how to display and manage merchandise and manage their money.

Employees at **Hyundai** who are ex-Marines use their personal scuba diving skills to clean rivers and in rescue and recovery.

**SOMPO**, 60% of whose revenue comes from auto insurance, operates its own authorized auto claim and repair centers. Employees from those centers together with SOMPO employees often volunteer in the wheelchair repair project organized by the Chikyu (Earth) Club, the employee association that leads volunteering for the company.

**FedEx** mechanics have used their core skills to service the “Flying Eye Hospital” airplane for Orbis International.

### How NAB Manages SBV

**National Australia Bank (NAB)** believes that SBV has greater impact for both the organizations served and for the volunteers. They have set a goal for 2010-11 that 15% of their employee volunteering will be skills-based – in 2009-10 they were at 8%. They have recognized that a major challenge is the investment that is needed by the company to make SBV successful, particularly staff who can consult with NGOs to scope their projects, manage the match and perform the necessary follow-up and evaluation.

To make the process work more effectively, they developed, in partnership with Volunteering Australia, the national volunteer center, a set of tools designed to help NGOs prepare for and manage skills-based volunteers. Their “Creating a Skilled Volunteering Role” takes NGOs step by step through an assessment of their needs, the definition of volunteer opportunities and preparation of a job description. The process is supported by their “Skills Register” that organizes job role tasks of NAB employees into general categories and identifies the skills they have to offer, expressed in language applicable to community groups.

“Managing Skilled Volunteering Roles” helps NGOs prepare to interview potential volunteers, plan induction and training, and clearly express the desired outcome of the work and the key milestones.

**Barriers within NGOs.** When Shannon Maynard became director of **Bankers without Borders (BwB)**, the Grameen Foundation’s global volunteer initiative, her goal was to create a strategic, centralized framework, a platform, for the involvement of skilled volunteers to replace existing ad hoc efforts.

In two years, BwB has grown dramatically, with significant support from J.P. Morgan, their lead corporate partner. They have new management software, built on a Salesforce.com platform; nearly 7,000 volunteers in their data base; program directors in three regions; several structured corporate partnerships; and, a steadily growing number of completed projects. They respond to Grameen Foundation’s internal volunteer needs and, through a series of partnerships, serve micro-finance institutions throughout the world.

### A BwB Success Story

Shannon Maynard and Taylor Robinson at BwB told us this story as an example of how they’ve put skills-based volunteers to work on a critical problem confronting the world’s poorest people – lack of safe drinking water.

With help from **J.P. Morgan** employees working through BwB, **danone.communities**, an organization working in India, is creating a business model to accelerate the rural poor’s access to safe drinking water.

The J.P. Morgan volunteers were able to help contribute to danone.communities’ projects and their business plan. Based on the ground in Mumbai, one investment banker used his experience in mergers and acquisitions and his knowledge of the local economic environment to help structure the venture. With his help, danone.communities predicts that in five to six years, more than four million people will have access to safe drinking water at an affordable price.

A key component of their development has been their identification and response to what they term “common roadblocks” to volunteering in NGOs.

In a report on BwB, aptly titled *Volunteerism: An Old Concept, A New Business Model*, (Grameen 2010), they write, “The biggest obstacles are not directly related to the volunteers themselves but to the host organization’s mindset and approach toward handling volunteers.”

They identify eight roadblocks to effective volunteering within NGOs. For each, they developed a specific response, actionable steps that they took to mitigate their impact:

- The myth that volunteers are free
- Lack of advanced planning
- Poor project management
- Steep learning curve for volunteers
- Inability to delegate work
- Bad experiences in the past
- Staff burden to find the right volunteers
- No quantifiable demonstration of volunteer’s value

### Moving to Action

#### How do you respond to the BwB-identified roadblocks?

Look again at the eight roadblocks Bankers without Borders identified.

If you are an NGO, ask yourself whether these are true for you. When you identify ones that are, consider what specific steps you can take to confront and resolve them. It may mean attention to staff development (both their perspective on volunteers and their volunteer management skills), adoption of new policies and practices, investment in organizational management and partnership building.

If you are a company, ask yourself whether you are encountering these roadblocks with your volunteer partners. If so, what actionable steps can you outline to deal with them? It will likely need to start with an open dialogue with the NGO (not a “here’s what you are doing wrong” scolding) with the offer to help them develop and execute action plans to remove these barriers to effective involvement of your volunteers.

**Professional resistance.** Deirdre White, president and CEO of CDC Development Solutions, presented an interesting perspective on the often-found resistance of the international development world to volunteers. She identified four potential sources of that resistance (White 2011).

- A sense that “you get what you pay for” – and if you aren’t paying anything then...;
- A fear that they will have less management control over a volunteer as compared to what they can exert over paid consultants;
- Use of “voluntourism” to describe cross-border SBV, thus “leaving the impression that the work to be done is secondary to the travel experience;”
- “An inherent mistrust of a volunteer’s motives.”

What she is touching on, in a very cogent way, is the barrier that has always existed in the volunteer world – the resistance of paid professionals to volunteers.

In research I once led (Allen 1992) on why some NGOs are more effective than others in their involvement of volunteers, we learned that such resistance is complicated and often deeply rooted in the training and mindset of helping professionals. It is a matter of professional identity. Simply put: “how can largely untrained volunteers do my job as well as I can?”

The response is not “volunteer management training.” It is a matter of professional development and, in many settings, organizational change.

The issue of professional resistance to volunteers is much more complicated than can be discussed in this space. Check out the accompanying box for ideas on how to deal with it.

### Moving to Action Preparing to Manage Resistance to Volunteers

Here is the key learning:

Be aware that you may encounter resistance from the professionals with whom your skills-based volunteers will be working most directly.

How to respond? First, remember what BwB wrote: “The biggest obstacles are not directly related to the volunteers themselves but to the host organization’s mindset and approach toward handling volunteers.” It is important to prepare volunteers that this may occur – and to assure them that it is not about them as individuals.

As professionals, many of them will understand that well. I recall interviewing nurses who, after their hospital shifts, volunteered in a community health clinic but who were adamantly opposed to volunteers coming on to their wards in any role, no matter how non-threatening to their professional status or roles.

Ask your volunteers to think through how they would feel having volunteers come into their workplace to “help them” – and how they would handle it if their managers were intent on having it happen even over their objections.

Second, discuss the issue *in advance* with your NGO partner. Agree on how such situations should best be handled, how volunteers can comfortably share the experience and how they will be supported in resolving it.

### Bringing Cross-Border Success Back Home

**Pfizer's** lead SBV has been its Global Health Fellows Program. Based on its success, the company has begun a new pilot program for team-based SBV in the communities where they operate. Their expectation is that it will prove the value of shorter-term projects and engage more employees in volunteer work with local NGOs.

In Groton, Connecticut, for example, two 6-7 person teams from the company's research and development center, are working with local health care NGOs, providing services for Alzheimer's patients and their families. Each team member commits 3-4 hours per week over the course of the three-month project that is designed to strengthen service delivery.

A local community relations staff member oversees the project, working with a team that includes Human Resources and R&D representatives to design the engagement and identify and select NGO partners and team members. An intermediary organization worked with Pfizer and the selected NGOs to scope the projects and evaluate overall progress and success.

## Cross-Border Volunteering

We have very deliberately chosen the term "cross-border volunteering" as opposed to "international corporate volunteering" that may sound more exciting but which is much less precise.

FSG Social Impact Advisors, in its very good report *Volunteering for Impact*, defines international corporate volunteering as an activity that "engages employees in service projects in countries outside a company's headquarters country." They describe two models: "local service" done by employee volunteers based in countries outside the headquarters county and "cross-border service" in which "employees travel abroad to volunteer" (Hills and Mahmud 2007).

In its *International Corporate Volunteerism* survey, CDC Development Solutions (Hurley 2010) used the same basic approach, using "intra-country" and "cross-border" ("where the volunteer does not normally live") as their descriptors.

The problem appears if that differentiation is not carried throughout the discussion.

It is correct, for example, to state that cross-border corporate volunteering is relatively new, really in its beginning stages. It is *incorrect* to say that about "local service" or "intra-country" efforts.

Indeed the whole point of the GVCV research was to underscore the breadth and scope of corporate volunteering worldwide and the significant investments of global companies in developing global volunteer efforts. While "newer" than their headquarters country programs, these efforts have been emerging over some two decades.

In the final report of that research we mistakenly used the term “international volunteering” instead of the more accurate “cross-border.” Oh, well. No one is perfect.

So, to be clear, in this chapter, we are talking about “cross-border” corporate volunteering in which employee volunteers go from the country of their residence to another country.

It is still early days for these efforts with only a relative handful of companies with significant programs. These tend to closely align with a company’s business interests, their corporate culture and the specific skill sets of their employees.

With the prominent exception of the **IBM** Corporate Service Corps, clearly the global leader in the field, these programs are relatively small. Because of the high cost of travel, living costs, project management and the need to “fill in” for missing workers at home, only a small number of employees are able to participate.

Thus, cross-border volunteering may remain a “niche” activity – high potential impact but limited in scope.

Five of the global companies in our research have made the commitment to building significant, sustained cross-border programs – **BD**, **Dow**, **GSK**, **IBM** and **Pfizer**. From their experiences, we have identified seven shared traits.

1. **Aligned with the Company.** In each case, there is clear alignment with the core competencies of the company – at IBM, problem solving through innovative technology; at BD, GSK and Pfizer with their respective expertise in health care; at Dow, with their 2015 Sustainability Goals and Human Element positioning.
2. **Skills-Based.** All are clear that their programs are about using the professional skills and work experience of their employees. Pfizer engages colleagues from across the company with medical and business expertise; IBM, not only IT professionals and skilled professionals from other business areas but also executives who focus on issues of urban management; Dow employees from areas like IT development, supply chain technology, financial management and strategic planning.
3. **Problem-Focused.** Pfizer’s Global Health Fellows Program is designed to strengthen health care in underserved communities around the world; IBM’s Corporate Service Corps was designed to focus on “community-driven economic development projects;” BD’s Volunteer Service Trips and GSK’s PULSE aim to improve health care systems; Dow more broadly targets major global development challenges. By being focused, they are able to clearly define the scope of their programs, attract volunteers with the right skills, leverage a variety of re-

sources within the company and build long-term partnerships with NGOs in the field.

4. **Leadership and Skills Development.** These programs are overtly about developing future leaders for the business. GSK PULSE volunteers credit the program with offering opportunities to use and/or develop all six of the key “GSK Behaviors,” particularly relationship building and flexible thinking. IBM sees the program as a “learning and innovation lab for 21<sup>st</sup> century business” that helps give employees a better understanding of the complexities of worldwide realities and of working with and leading multicultural teams. For Dow, employee engagement and providing “a unique leadership development experience” are two of the key drivers of their program. Programs are almost always team-based and, because they draw employees from around the world, offer an opportunity to work in a multicultural team setting.
5. **Rigorous Process.** These companies take their programs seriously and manage them to high standards. By testing four pilot projects, for example, Dow recognized the need for a strategic approach to put the right infrastructure in place and to get the mechanics of the program organized.

For the volunteers, the process begins with a formal application and selection process, typically highly competitive for limited available slots. Each company does significant advance preparation, using both virtual and in-person opportunities for volunteers to share knowledge and to work together. Each also has clear policies that provide the human resources frameworks for their programs – who pays for what, how “fill in” workers are put in place, job protection for the volunteers, etc.

6. **Partnerships.** None of the companies would claim that they can implement their program on their own. All work closely with NGO partners that have demonstrated expertise and extensive experience in on-the-ground organization and management of cross-border volunteer projects, from scoping needs and selecting local hosts to cultural training when volunteers arrive to managing the entire in-country process.
7. **Learning.** More than in any other type of program seen in this study, these companies are deliberately seeking to learn about and *from* the experience of their employee volunteers. Boston University School of Public Health conducts external evaluation and annual reporting on the impact of the Pfizer Global Health Fellows program, assessing Fellow performance and the effects on capacity building. IBM partners with Harvard Business School as their independent evaluator to gain an understanding of the impact of the program on the volunteers, the communities served and the company. In the two months after deployment, volunteers are expected to “reflect, learn and apply,” both evaluating and sharing their experiences within and outside the company.

GSK does internal surveying of volunteers six months after their return to learn their perceptions of their assignments and of the value of participation to them. BD has commissioned Corporate Citizenship to do a case study of its three years of Volunteer Service Projects to Ghana. Their partner NGOs provide constant updating on post-trip progress and volunteers participate in debriefing interviews. Dow tracks what happens in the organizations they serve after the project, not only whether immediate project objectives were fulfilled but what that has meant – were recommendations implemented, did production increase, did they get more money, was quality of service delivery improved?

**Other Models.** Among the global companies we interviewed, there were a variety of approaches to cross-border volunteering. Here are four.

The **Telefónica** Vacaciones Solidarias program enables 100 employees, from all over the world, to volunteer each year for the company's Proniño program that combats child labor in Latin America. Volunteers, chosen from an applicant pool of about 600 annually, use their vacation time and pay for their own meals while the company pays air fare, hotel and project costs. NGO partners in Proniño in up to 10 countries propose projects. The program grew directly from an idea presented to the company by employees in Spain.

**American Airlines (AA)** may find it easier to do cross-border volunteering than most other companies because it has a readily available way to move volunteers from country to country. Through Airline Ambassadors and Medical Wings International, both NGOs founded by AA employees, AA volunteers can organize and participate in medical missions, escort children to needed medical care not available in their home country and hand-deliver humanitarian aid. Responding to natural disasters, AA employees can use their travel privileges to work with an NGO on the ground, supported by employee volunteers back home who set up fundraising drives and collect in-kind resources.

**Eli Lilly and Company's** Connecting Hearts Abroad program provides two paid weeks off for 200 employees a year to participate in volunteer service and cultural immersion trips in Africa, Asia, Eastern Europe and Latin America. They are selected from applicants from Lilly operations worldwide, formed into cross-functional, multi-national teams and, in partnership with Cross Cultural Solutions, given the opportunity to "get outside the walls of the company to better understand the people who take our medicine."

Keeping with its focus on sustainability, **Fujitsu** organizes an annual planting tour to Borneo. Employees pay their own costs and use a combination of the company's "volunteer holidays" and personal vacation time. With financial contributions from 10,000 employees, the company established the Fujitsu Group Eco-Forest Park. Company vol-

unteers have planted over 37,500 seedlings there. The company also has a sabbatical program for employees in Japan to enable them to participate in the government-run Japanese Overseas Cooperation Volunteers program, guaranteeing them a job on their return. One or two employees participate every year.

### Closing Thoughts

Both SBV and cross-border volunteering are easy to love.

They both carry a common-sense logic that their impact must be greater than “traditional volunteering” because they are so closely aligned with the core competencies of companies and the skills of their employees.

They create a sense of “specialness” within the company – they are competitive, a touch exotic, something in which the whole company can take great pride.

And, they are media-friendly. They make for good stories, they look great on company web sites and it is easy to generate sound bites about their virtues.

But.

They are resource intensive, limiting the realistic scope of their reach and potentially redefining our “big tent” image of corporate volunteering to a one ring affair.

Both have been used in some forums to draw denigrating comparisons with the “traditional volunteering” that companies “traditionally” have made available to the bulk of their employees.

They are usually overtly about building the skills and leadership capacity of employees, creating the danger of that goal overrunning what should be the primary purpose: service to the community.

Advocates for both would do well to recognize that there is a reason why the “big tent” has evolved as it has. Companies, employees, communities – there are vast differences within each. There needs to be room for a variety of approaches – and the promotion of one or two need not undercut the value or appeal of others.

# Measurement and Evaluation

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# Chapter 13

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## The Basics

Measurement and evaluation. Data, performance, impact.

Those are most often a central part of the discussion wherever and whenever managers of corporate volunteer programs gather, whether on the formal agenda or around the coffee pot.

From the very origins of the field, debate has continued about what to measure, what to evaluate and how to do it. What activities and what results will we count? How will we judge our performance? How will we assess the impact of our work?

Yet, despite a professed desire for excellence and impact in their community involvement, few companies make the investment required to determine whether those desires are being met.

In this chapter, our focus will be on the value of measurement, the current state of practice and the conceptual and practical barriers to measurement and evaluation. We will also look at two current approaches, one in the U.S. and a U.K.-based but more global one, to collecting basic data on volunteering. We will conclude with attempts to answer the question, "Monetarily, how much is volunteering worth?"

In Chapter 14, we will turn our attention to how we assess the performance of our overall volunteer effort, looking at two independently developed sets of guidelines against which to measure ourselves and our approaches to collecting data.

Finally, in Chapter 15, we come to the "holy grail" – assessing the impact of the work that we do.

### Why Measure?

"You have to measure. Even if it means taking baby steps, you have to measure. Because if you measure, you start in some way to gain understanding and acceptance from others."

That quote is from Don Bernhard, manager of Economic Development and Community Affairs at PPL Corporation, an experienced community affairs executive at an electric utility. It comes from a very helpful publication of the Boston College Center for Corporate Citizenship, *Measurement Demystified: Determining the Value of Corporate Community Involvement* (Rochlin, Coutsoukis and Carbone 2001) developed by staff of the center in partnership with the American Productivity and Quality Center. We will refer to it occasionally over these next three chapters. It is available online at

<http://www.bcccc.net/index.cfm?fuseaction=document.showDocumentById&DocumentID=313>.

It captures an important reality. **Businesses live and die by their numbers, the lingua franca of management – and numbers are generated by measurement.**

Throughout this book we have emphasized the need for companies to apply to their volunteering, indeed to their entire community involvement effort, the same management rigor that they apply to the balance of their business. For that to happen, measurement must be an integral part of any volunteer effort.

Farron Levy (2011), president of the True Impact consultancy in the U.S., whose model for assessing impact we will review in Chapter 15, reinforces that when he argues that measurement “can help build internal support by framing community involvement in the language of the business.”

He adds two additional reasons why measurement is critical, both true of any corporate function:

- It helps improve performance by identifying successful practices that can be replicated and weak ones that can be strengthened or eliminated.
- It provides data to support planning, decision making and resource allocation.

In short, measurement holds the same benefits for community involvement that it does for any other aspect of a business.

## The Current Reality

With little surprise but great regret, we were forced to conclude in our research:

**While there is recognition of the importance of assessing performance, outputs and impact, there is little ongoing investment in sustained and consistent measurement and evaluation.**

As we reviewed our interviews with the 48 participating companies, we found that most of what was described as measurement and evaluation was limited in scope, inconsistent in application and relatively mundane. The “we count things” response was much more the norm than was “we measure, assess, evaluate.” There were limited examples that could be held up for learning and replication.

In this, they seem to have a great deal of company.

A study by the Global Reporting Initiative (GRI 2008), done in cooperation with the University of Hong Kong and CSR Asia, examined the sustainability reports of a random selection of 72 companies.

They found that about half of the reports included information on “Community Services and Employee Volunteering,” but half of those did not indicate general approaches, policies or goals underneath those activities. The report states, “... for Employee Volunteering, the focus appears to be on counting the number of organizations served, and the [level of] participation of employees as opposed to measuring the effect of this involvement for communities.”

The report concludes, “Companies tend to report on what might be ‘easier’ to report on but not necessarily what matters...”

There was also an interesting geographic difference in reporting practices. In the random sample used, 76.9% of companies in Asia and 72.4% of companies in North America but only 38.9% of companies in Europe reported on “Community Services and Employee Volunteering.”

### Moving Ahead

Fortunately, as we will discuss below, there are efforts underway to move the practice of measurement and evaluation of corporate volunteering forward into a new era. Here, we review those efforts, share the concepts and practices on which they are being built, and seek to understand their implications for the field.

Unfortunately the work that is most readily visible and available is in the U.S. and the U.K. with only a limited participation of companies not headquartered in either Europe or North America. Thus, the work is not truly global and carries the biases that may be prevalent in each country.

Having said that, it is important to underscore the leadership of the London Benchmarking Group (LBG) and its managing company Corporate Citizenship, the Points of Light Institute and the Boston College Center for Corporate Citizenship in this area. They are laying the groundwork for what ultimately may be the development of global tools and practices.

Measurement and evaluation is not a barren field. But it is one in which the seedlings are only now beginning to emerge. They are surviving, not yet thriving. Over time they may well become integral to what we have come to consider as standard practice in corporate volunteering.

## The Barriers to Measurement

Why do companies' practices lag behind their professed beliefs?

There are both conceptual/philosophical and practical barriers to measurement. With understanding, we can begin to develop strategies to move us past them.

### Conceptual/Philosophical Barriers to Measurement

- Volunteering is a complex process with many stakeholders, many possible metrics and many potential outcomes and impacts.
- Volunteering is often about intangibles that may appear to defy measurement.
- There may be resistance to driving volunteering "by the numbers."

**The Complexity.** C&A in Brazil is making important conceptual contributions to understanding volunteering. They recognize the complexity of the process of volunteering, one in which "some measurements are possible but they don't do justice to the program."

Thus their goal is to develop an evaluation system that goes beyond data on impact to enable learning and reflection.

Luiz Covo, coordinator of C&A's Programa Voluntariado, puts it this way: "To ensure that what is important remains important and that what is secondary remains secondary is not such a trivial task. Often the secondary can become important and what is important can become secondary."

This might lead to a new version of the "serenity prayer" for those so inclined:

May we all be granted the wisdom to be able to distinguish that which is of primary importance and that which is secondary. May that wisdom be translated into careful selection of the data we really need to collect and that which will simply burden us with more than we want or need to know. May we always keep our goals as our guideposts, our surveys short, our questions precise.

**The Intangibles.** At the very outset of *Measurement Demystified* (Rochlin et al. 2001), the authors, speaking of corporate community involvement, note that it "is about intangibles: relationships, reputation, and responsibility. How does one measure a company's performance in these areas?"

That sense of the intangible is clearly true of volunteering. For companies like **The Walt Disney Company** and **American Airlines**, a centerpiece of their volunteer efforts is

their support for programs that grant wishes of children with life-threatening illnesses. At American, employees turned volunteer entrepreneurs even created the Something mAAgic Foundation to support wish-granting NGOs.

However, as we learned from our interview with Disney staff, there sadly is no “Happy Meter” that can truly measure the impact that a granted wish or a visit from a Disney character can have on a child and family.

This has significant implications for the kind of data that we consider valid, how we collect it and what we do with it. We will look at this more deeply when we discuss impact evaluation.

**The Resistance.** In our research, we met several companies in which volunteering is driven “by the numbers.” That is, high expectations, often expressed as levels of volunteer involvement to be achieved, are set by top management. They included total number of employees to be involved, percentage of total employees to volunteer, total number of hours to be volunteered and so on. One company confessed that their “number” really had little basis on past or even likely future performance but essentially came out of moderately thin air – but had a good feel to it!

*Skeptics see a preoccupation with “the numbers” as turning attention away from innovation, the value to the employees who volunteer and to the company and the benefits to the community being served.*

Some of those companies are ones in which “the numbers” are at the core of their business, where everything, at some point, gets counted, measured, assessed. For them, it is both a natural and probably a necessary organizing principle for their work. Not to do it “by the numbers” would render it much less important and less likely to succeed in their environment.

But we also met companies for which the “hit the numbers” approach was uncomfortable and seemed inappropriate. While they appreciated the rationale for measurement and were interested in changes in their performance over time, they were not convinced that “more” is the most appropriate way to assess volunteering.

They see a preoccupation with “the numbers” as turning attention away from innovation, the value to the employees who volunteer and to the company and the benefits to the community being served.

Some of the measurement skeptics raise a concern that such an approach takes away from the “voluntariness” of the activity more than it demonstrates corporate commitment. It can lead, in their minds, to increasing pressure for employees to “volunteer,” to

the point where it becomes counter-productive, with enthusiasm replaced by a sense of compulsion.

**Practical Barriers.** There are also practical barriers that, while they may feed skepticism, may also be very real impediments to effective measurement.

| Practical Barriers to Measurement | Their Characteristics   |
|-----------------------------------|---|
| Low Expectations by the Company   | <ul style="list-style-type: none"> <li>• Less demand for accountability and performance than in other business functions</li> <li>• Less willingness to invest the human and financial resources required</li> <li>• Softer form of "proof" is acceptable</li> <li>• Reliance on anecdotes, observations and common sense assessments rather than hard data</li> <li>• Subjective sense of how people "feel" about their volunteer experience is acceptable</li> <li>• Feedback from NGO partners accepted at face value despite their vested interest in maintaining positive relationship with company</li> </ul> |
| Lack of Data Collection Systems   | <ul style="list-style-type: none"> <li>• Basic data collection systems not in place, so no real understanding of nature and scope of volunteering as it is now happening</li> <li>• Expectations for data collection in headquarters country or region more rigorous than for the rest of the corporate system</li> <li>• Lack of consistent and widely accepted standards across the company for reporting CSR, community involvement, volunteering</li> <li>• Ambivalence toward mandated reporting</li> </ul>  |
| Absence of Standards              | <ul style="list-style-type: none"> <li>• No commonly accepted global standards; thus, no easy way to compare against objective standards or against other companies</li> </ul>  |
| Absence of Models                 | <ul style="list-style-type: none"> <li>• Absence of globally accepted standardized models for data collection</li> <li>• Few frameworks that companies can adopt to ensure consistency across the company</li> </ul>  |
| Global/Regional Differences       | <ul style="list-style-type: none"> <li>• Different understandings of volunteering rooted in different cultures makes it difficult to develop common measures</li> <li>• Difficulty in developing and gaining acceptance of definitions of different aspects of volunteering across companies</li> </ul>   |

### **“If we don’t know where we are going...**

... how will we know when we get there?”

There are so many variations on that quote that it is impossible to correctly attribute it – but it clearly applies to any attempts we make at measuring and assessing our work.

The authors of *Measurement Demystified* (Rochlin et al. 2001) state it best:

... begin before you start. Prior to launching a new initiative, decide what results you want to achieve... the most important part of the process of creating and measuring value starts at the outset of planning strategies, programs and activities.

The seeds of the measures used to determine what has been achieved rest in that initial definition of desired outcomes.

Yet it was not clear the extent to which the companies we interviewed were rigorous in their goal-setting. It is, naturally enough, a somewhat difficult question to ask – “Oh, by the way, do you figure out what you are trying to accomplish before you begin a program?” – and even more difficult to respond, “Why, no, we don’t. We just plunge in and hope for the best.”

While we did not see a lot of evidence of plunging, we did have the sense that some companies were not as rigorous as they could be in clearly identifying the various stakeholders for each activity and defining the desired results associated with each.

Part of that process is ensuring that objectives are both externally facing and internally facing.

Externally facing objectives relate to the impact you wish to have on a chosen problem, issue or target group in the community.

Internally facing objectives relate to the results you are seeking within your company, whether that be numbers of people mobilized or the extent to which employee volunteers are using their current work skills or learning and practicing new ones.

Once it is possible to state, with clarity, confidence and appropriate approval, “here are the things we want to accomplish with this activity,” the foundation has been laid to define the measures to be applied to determine if they are accomplished and, thus, to identify the data to be collected.

## Collecting Data

Most everyone will agree that it is a very good idea to collect basic data about volunteering – who is doing what, in what way, with what results. Getting it done, however, is not as easy as one might think.

The reality is that there are no globally agreed upon and accepted standards for what data should be collected – indeed, not even agreement on how to define some of the most basic data (for example what volunteer hours are counted).

The London Benchmarking Group in the U.K. and the Points of Light Institute (POLI) in the U.S. are working independently on standardized data collection systems. Both are significant, positive approaches toward building a single framework around which companies can rally. Having comparable, dependable, consistent data is essential to the maturation of the field.

### London Benchmarking Group (U.K.)

London Benchmarking Group, popularly known as LBG, was created in 1994 in response to the need by companies for a measurement model for corporate community involvement. It has now grown into a network of over 120 companies.

Although LBG is working to develop a credible “global” tool, non-U.K. companies remain in a distinct minority, roughly 30% of the total, from Europe, North America, the Middle East and Asia-Pacific with only limited participation by companies based in the U.S. and in Asia.

LBG was created and is managed by the Corporate Citizenship consultancy which is based in London. There is significant member participation through a “steering group” that contributes to ensuring quality and consistency in application of the LBG model.

The goal of LBG is to provide a common measure for cash, time and in-kind contributions to the community. According to David Logan, co-founder of Corporate Citizenship, their model “uses the concepts and language of business – inputs, outputs and impact – to align with business. It allows businesses to be known for what they accomplish, not what they give.”

Use of the tool allows companies to measure and to benchmark against others in the group, all using the same definitions. It provides accurate internal accounting and data that companies can use externally as they wish.

Here are the specifics on how LBG approaches volunteering.

LBG defines a “time contribution” as “the cost to the company of the paid working hours contributed by employees to a community organization or activity.” They include within that employee volunteering, secondments, fundraising activities and supervision of work experience placements.

As Jon Lloyd, senior consultant at the Corporate Citizenship consultancy that manages LBG, explains, LBG counts “any activity that benefits society during paid working time” whether or not organized by the company. Their core principle is that employees are paid for the time, without consideration as to whether, in fact, they are doing this on some kind of “flex time” arrangement.

They separately count “leveraged hours,” those done outside paid work time “if it can be established that the employee has committed their own time as a result of encouragement or support from the company.” But “time committed by employees that is independent of any company support” is not reported either as a company contribution or as leveraged time.

As described below, they are then able to calculate the monetary value of volunteering to the company for hours worked on paid time. But they do not calculate a monetary value for leveraged hours.

### The Points of Light Institute (U.S.)

The Points of Light Institute's *Employee Volunteer Program Reporting Standards* were developed in 2006 and revised in 2010. The goal is to provide “a standardized approach to EVP reporting, measurement, and performance benchmarking.”

These are standards for data collection and documentation. They seek to establish consistency concerning what data should be collected about employee volunteering and how that collection takes place.

They are **not** absolute standards against which companies can measure themselves. If a sufficient number of companies adopt this framework and report their data, this can potentially become a resource against which companies can benchmark. Ultimately, when combined with other research, the data might contribute to formulation of objective standards of performance.

The most recent report (at the time this was written, August 2011) on the Reporting Standards –is available online at <http://www.pointsoflight.org/sites/default/files/2010-POLI-EVP-Reporting-Standards.pdf>.

We will not replicate the entire very detailed framework here but we do want to call attention to key components because of their potential importance to the field and to some of their implications.

It also is important to underscore why it may not work as a global tool, given its American origins. Although virtually all of the member companies of the POLI/Hands on Network Corporate Service Council, under whose umbrella this work is being done, operate globally, none are headquartered outside the U.S. Thus while they may bring an "international" perspective, it is unclear that they can offer the kind of diverse "global" perspective critical to building a global tool.

Having said that, it is also important to acknowledge that POLI and its companies have not made the claim that this is a global tool. Indeed, it may not yet be clear the extent to which even those American companies will or can use it to collect data for their entire global systems.

## Definitions

The focus is on volunteer programs that are, effectively, controlled by the company. Their definition:

An employee volunteer program (EVP) is a planned, managed effort that seeks to motivate and enable employees to effectively volunteer under the leadership of the employer. Typically, EVPs offer a structured set of volunteer activities programmed specifically for the employees of a company.

A companion definition indicates that "volunteer activities conducted through EVPs must have associated company-supported hours reported by employee volunteers or others through the EVP."

These definitions may, in practice, be too limiting, depending on the operational interpretation of them. For example:

- Does a program built on the leadership of volunteer teams, with decisions about what will be done and how they will be done vested in employee volunteers themselves, fit into this definition?
- Is it possible for some aspects of what a company considers its volunteer program to fit and others not? If so, is it clear how companies should differentiate between them?

Another part of the definition of volunteer activities says that they must "benefit a nonprofit organization."

This would exclude any activities which do not work with or through a nonprofit organization/NGO. Thus, for example, it would appear not to count if employee volunteers grew vegetables on company property, harvested them, took them to a low income neighborhood and distributed them directly to residents.

While it clearly makes sense for companies to work in partnership with NGOs, that is not the only way their volunteering can happen. In many countries, particularly where corporate volunteering is in its earliest stages of development, this may be an inappropriate limitation and may exclude grass-roots volunteering done by employees with company support, particularly in areas where NGOs are weak or non-existent.

### Who Volunteers

The standards very helpfully differentiate among different types of employee volunteers, providing categories that may prove broadly useful: traditional, skills-based, pro bono and guests (retirees, family members and friends).

Here, use of the word “traditional” does not appear to denigrate, as we noted it had in other usages, only to describe. There is a helpful differentiation between skills-based and pro bono. The “guests” category would be strengthened by the addition of clients, customers, vendors, etc.

### What to Collect and Report

The standards call for collecting data in five areas: external partner organizations, types of volunteers, categories of volunteer activities, demographics of the volunteers and volunteer hours.

There are detailed guidelines for how to count hours differentiating between “company paid” and non-paid and whether volunteering happens on or off company time.

### Metrics

A key component of the Reporting Standards is to use the data to produce metrics for EVP programs. There are a wide variety of metrics and the calculations used to create them are well described.

Most of the proposed calculations are relatively straightforward – what percentage of employees volunteer; what is the proportional breakdown of types of volunteers versus the total number who volunteer; what is the proportion of volunteering that is “company paid” versus not.

### Will It Work?

A very real investment of time and energy will be required for companies to implement the standards. For many, it will mean significant changes in their internal reporting systems. For others, it will mean creating those systems, particularly if the intent is to collect data from company operations outside the United States.

The goal of collecting and reporting consistent, standards-based data is tremendously worthy. Points of Light Institute has done a fine job creating a potentially viable framework. It anticipated having the actual tools for reporting in place by the end of 2011.

The burden then will be on the 30+ companies reportedly committed to this approach to demonstrate that this level of data collection is of sufficient importance for them to make the required investment.

## What is Volunteering Worth?

Using the “concepts and language” of business, as LBG does, eventually leads to the question of how best to put a monetary value on volunteer hours. Currently a “wage replacement” approach is commonly used. Here is a synopsis of the ways it is being or can be done.

### Overall Country Calculation (U.S., Korea, England)

**United States.** Since at least 1990, Independent Sector, a national NGO advocate for the voluntary sector and philanthropy in the U.S., has calculated and published the monetary value of volunteering. It is widely accepted, quoted and used throughout the country.

In 2010 that value was \$21.36 per hour.

Their calculation uses U.S. government statistics on the average hourly earnings of all production and non-supervisory workers on private non-farm payrolls and then adds 12% to estimate for fringe benefits.

It is critical to note the limitations of the base data used. It does not include people who work for government at any level. It does not include managers. It does not include any provision for people with specialized skills.

Independent Sector also provides a state-by-state average value of volunteering. In 2009, that ranged from a low of \$14.89 per hour in Montana to a high of \$27.17 per hour in New York.

Learn more at [www.independentsector.org/volunteer\\_time](http://www.independentsector.org/volunteer_time).

**Korea.** A parallel calculation was done in Korea, using the average wage for vocations except agriculture and fishing as published annually by the Korean Central Bank. It computes to roughly US\$10 per hour.

**England.** Volunteering England suggests two similar methods for calculating the value of volunteering. The first uses the gross average hourly wage for full-time em-

ployees in England (£13.90 in 2008); the second, uses local rates of pay, all calculated by the Office for National Statistics.

### Calculations within a Company

As explained in the *LBG Guidance Manual* (Corporate Citizenship 2008), LBG seeks to “establish a figure that most accurately reflects the true cost to the company of an employee actively participating in a community activity during paid work time.”

They suggest using data from the company's HR department or its annual report to calculate an average hourly wage across the company. When data is not available, they recommend use of the Office for National Statistics nationwide calculation.

### Skills-Based Calculation

The True Impact consultancy works with the same U.S. Bureau of Labor Statistics data that the Independent Sector does, but it uses activity-specific values. Farron Levy (2011) writes that giving different activities different monetary values “helps volunteer managers get better insight into how well-leveraged their volunteer hours are in terms of generating value for their beneficiary organizations.”

When working with individual companies, he and his colleagues use internal company data to compute the value of various activities. He stresses that “what someone is paid in salary or billed out to typical clients is not relevant to calculating the value of volunteer service – unless that person is performing their professional service” as a volunteer.

The calculation must be based on the value of the **work** being done, **not** on the occupation of the volunteer.

They refine it further to ensure that when measuring pro bono professional services, they calculate what it likely would have cost an NGO to purchase that service on the open market. This is based on the assumption that NGOs typically do not pay the same corporate rates for similar services.

The Points of Light Institute has created a helpful tool, the Economic Impact of Volunteering Calculator, that uses the same activity-specific values from the Bureau of Labor Statistics.

It is easy to use. A drop down list and a search tool allow for identification of specific occupations and/or skills. Once one is selected, the hourly rate plus 12% fringe benefits is shown. Entering the number of hours volunteered will complete the calculation.

Thus, a volunteer providing 50 hours of clerical assistance in a community library is worth \$12.19 per hour or \$609 total while a volunteer lawyer providing legal services to that library is worth \$59.55 per hour or \$2,977 total.

The calculator can be found at <http://www.handsonnetwork.org/tools/volunteercalculator>.

## The International Labour Organization

Lester Salamon, director of the Center for Civil Society Studies at Johns Hopkins University, has long been a global leader in promoting and implementing approaches to measuring the voluntary sector and volunteering. Working in cooperation with the International Labour Organization (ILO) and the International Technical Experts Group, he and his colleagues developed the *ILO Manual on the Measurement of Volunteer Work*.

It calls on all national statistical agencies throughout the world to measure the amount and economic value of volunteering through regular labor force or other household surveys. As it is adopted by individual countries, it will generate comparable data on volunteering.

It will be a long-term effort to gain adoption of the ILO manual throughout the world. For more information on the international coalition leading this effort, go to [www.ccss.jhu.edu](http://www.ccss.jhu.edu) and look for the "Global Volunteer Measurement Project." The manual is available online at <http://ccss.jhu.edu/publications-findings?did=136> and at [http://www.ilo.org/stat/Publications/lang--en/WCMS\\_162119/index.htm](http://www.ilo.org/stat/Publications/lang--en/WCMS_162119/index.htm).

The ILO approach is based on assessing the economic value of the actual work done, as reported by individual volunteers.

In an interesting twist for corporate volunteering, this approach requires that volunteering on company time be segregated from volunteering done on personal time. Because national labor statistics already count the value of time people are paid to work, to include those same hours in the volunteer category would be to double count them.

This does not lessen the importance of "on company time" volunteering nor mean that it is not recorded. It simply is, for an obvious technical reason, in a different category.

## Closing Thoughts

Volunteer and nonprofit management consultant Linda Graff (2009) of Canada says that the "wage replacement approaches" we've described above "simply [produce] an amount equivalent to what the organization *has not paid* for the work that volunteers have done. It really bears no connection to the actual *value* of the work itself."

She argues, “Any volunteer work valuation model must account for the fact that the benefits that flow out of volunteer work are not unidirectional. Rather, the benefits of volunteer work flow out in many directions, and many people and entities reap benefits from each act of volunteering.”

Levy (2011) at True Impact concurs. He writes, “To get at the full economic impact, you would have to look at the result of the volunteerism on the nonprofit and its beneficiaries and to what degree that had economic ripple effects – which... in the case of traditional volunteerism is often not practical.”

Recall our earlier discussion of the intangibles of volunteering, the benefits and impacts that cannot possibly be quantified.

David Boyd-Thomas of UBS in Hong Kong put it very well to me in an email: “How do you value a mentor to a secondary school student?”

How does the “consumer,” whether an NGO, a government agency or an individual, value the volunteer service they receive?

How do companies or third-party observers take that perceived value into account in their reporting?

How do we ensure that a calculated monetary value does not become the dominant way in which corporate volunteering is perceived within companies and reported publicly?

There is no doubt that measurement and evaluation will be integral to sustained corporate support of volunteering. Developing the appropriate systems, articulating their viability and building support for them are ongoing challenges.

# Chapter 14

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## Evaluating Performance

Ed Koch, mayor of New York City in the 1980s, was famous for stopping residents on the street and asking “How am I doing?” as a way of assessing his performance.

He had at least part of the process right – gauging the perceptions of others about his performance.

But he was missing – or, perhaps, kept hidden from public view – the standards against which the responses were evaluated.

Well-done evaluations of performance require both a means to receive input and some baseline standards.

In this chapter, we will present two tools available to evaluate the performance of a company’s volunteer efforts that have both elements. In the interests of full transparency, please note that I have a personal interest in one, the Performance Indicators for Corporate Volunteering Programs, as I was one of its co-developers.

While similar in many ways, the two offer different perspectives on performance effectiveness. We urge you to give both a try.

### **The Performance Indicators for Corporate Volunteering**

The Performance Indicators (PIs) were born in Brazil in 2003 when Monica Galiano and I were working together in an innovative effort to promote corporate volunteering in the country’s industrial heartland, the state of Minas Gerais. We recognized that we were hearing the same thing from companies there that we had heard in other parts of Brazil, in the United States, and around the world: “Help us measure the quality of our program.”

Our goal was to provide a straightforward, easy-to-use tool that would show companies both the strengths and the areas for improvement in their volunteer efforts.

We worked with 14 companies in Brazil to develop and test the first version of the PIs. We drew on their expertise as a complement to our own experience, ensuring that we would come up with something comfortable for companies to actually use. Since then, we have had input from companies in the United States and we have previewed the PIs around the world.

That we could begin the development process in Brazil is a reflection of how, even then, corporate volunteering was becoming a widely accepted response to the rapidly emerging worldwide expectations for corporate social responsibility and community engagement.

It also is a testimony to the rapid and innovative development of corporate volunteering in Brazil, the fifth largest country in the world and now one of the world's leaders in volunteering.

We believed then and continue to believe that the fundamental principles underlying “world class” corporate volunteering are truly universal, just as the fundamental principles of globally successful businesses are. Thus we hoped that the Performance Indicators would be of significant value to companies worldwide.

### From Hope to Reality

Before sharing them, it is important to say that our hopes have largely gone unrealized. The Performance Indicators have had their greatest use in Brazil, with a relative handful of companies in other countries testing them. The reasons for that limited use are, we think, instructive and hopefully of value to others who may undertake similar efforts.

**First**, we designed an online tool that would enable companies to get input from as broad an internal audience as they wished. Thus, they could theoretically invite every employee to respond. But, more realistically, they could approach people in leadership positions, as far down the hierarchy as they wished, employees who as volunteers were leading local volunteer efforts, or only those on the actual operating team responsible for managing the volunteer effort. The tool could be used at any level of the company – from an overall global assessment to a self-assessment by a single unit.

We discovered that actually implementing such a survey was quite difficult in many companies. Special permission was needed. Privacy rules prevented them from providing us with email addresses. It was difficult for employees to link to online surveys outside the company's system. And so on.

**Second**, we designed the Performance Indicators to give feedback on how well the company is perceived internally to be performing in the planning and implementation of its volunteer efforts. Our hope was that, over time, we could build enough data that companies could benchmark against one another.

In practice, we discovered that companies did not want to or could not invest the work required to use the PIs. They were content with the after-action surveys many of them used to find out how well a project operated. Asking bigger questions about overall effectiveness held less interest.

This may have been a factor of the time required to use the PIs. It requires management time to set up, decide who will be surveyed, promote it internally, etc. It requires time, perhaps up to a half hour, to complete the survey (our biggest surprise was how many respondents would stop in the middle).

Time is also required to make meaning out of the results. Our model called for those with greatest responsibility within the company for volunteering to work with the data, to discuss the relevance of the results for their company, to set priorities for what they saw as the most important weaknesses for them to address and to establish action plans to do that work.

Thus, using the PIs well is not something done lightly. They are not the kind of quick self-improvement surveys we find in popular magazines, newspapers or online. There is a time investment required.

There was also a sense that perhaps the companies didn't really want to know how they were performing, at least not when that assessment included getting detailed feedback from throughout the company.

Certainly it is true that assessing performance against standards was not, in practice, as important to companies as measuring the results/outputs or the impact of their volunteer efforts.

**Third**, we did not make a sufficient investment to promote the PIs. Our business model was flawed and neither individually nor together did we have the time or the assets to push it forward, particularly because, as independent consultants, we had no organizational base to give it credibility, a ready group of companies to participate or financial support to market and sustain it.

### The Model

The six concepts presented in Chapter 8 are the starting point for the Performance Indicators.

The six "Essential Elements," the broadest component of the PI framework, tie directly to those six concepts that described what we see as key components of success for a corporate volunteer effort. The rest of the tool builds from them.

#### **The 60 Measures**

Most specific tests of performance

Five Measures per Indicator show the extent to which the Indicator is in place

#### **The 12 Indicators**

Help determine if the Elements are in place

Measure the extent to which the Indicators are in place within a company

#### **The Six Essential Elements**

Extent to which they are in place within a company assessed by data on Measures and Indicators and overall assessment of each Element by the company

Thus, to complete the PIs, a user responds to 60 statements, indicating if the Measure is:

- generally not true for the company;
- mostly true but could be stronger; or,
- completely true.

We believed it was important not to create rigid or artificial standards. Indeed, we do not believe there are absolute, objective quantitative measures. Nor do we believe strict judgment is necessarily helpful to improving performance.

Rather, the PIs are aspirational, a framework within which companies can seek to grow and improve over time. They are a way of testing the current level of development and setting new developmental goals and strategies.

## The Six Essential Elements

Here, then, are the descriptions of the six Essential Elements. As you read them, reflect on how well your company measures up against them. To what extent are these true for your company?

### **I. Leadership Commitment and a Positive Overall Organizational Environment**

The company recognizes that acting as a responsible member of society is a critical factor in its overall success. It is committed to corporate social responsibility as a strategic part of doing business. Because it recognizes that its people are one of its most important assets, it is committed to encouraging and enabling its employees to be actively involved in their communities. Leaders at all levels of the company help create an environment that places high value on employee volunteering in the community.

### **II. Policy Framework that Enables High Performance**

The company has put in place the policies, processes, and structures required to effectively engage employees in the community. Employees throughout the company are encouraged to participate in all phases of planning, implementing, and evaluating activities that are appropriate for their company units and communities.

### **III. Strong Partnerships with the Community**

Strong partnerships have been developed with the community – with grassroots associations, nonprofit organizations, and the government – that identify

community priorities and ensure that the company's volunteer resources are focused on those priorities. Partnerships are understood as a way to grow the partners' capacity to do more work and to serve more people. The company works hard to ensure that their partners in the community have an equal voice in defining and planning their work together.

#### **IV. Managing for Impact, Sustainability and Innovation**

Companies manage their employee volunteer efforts in ways that maximize impact, that encourage and stimulate innovation, and that create sustainable programs. Companies apply the same rigorous management standards to these efforts as they do to their core business operations.

#### **V. Learning from Action**

Excellence and high impact are built on a commitment to actively learn from experience and to putting newly developed knowledge to work in the interests of continuous improvement. Most companies collect data on the nature, scope, and results of employee volunteering activities – how much service is provided, to whom, etc. Companies committed to building sustained excellence work hard to convert that data, through analysis, into knowledge that helps them improve every aspect of the work.

Truly excellent companies take the major step of investing in formal evaluation techniques that demonstrate the impact of their employee volunteering activities. Through pre- and post-tests they are able to track the changes that result from their work – changes in the people and organizations served, in the community as a whole, in the company, and in the employees who are engaged.

#### **VI. Leadership for Business and Community**

“If volunteering is good for our employees, for our company, and for the community, then it is good for others as well.” That is the way one business leader summarized the reason why his company provided active leadership for the expansion of volunteering throughout the business community and in the community as a whole.

True world-class companies recognize that they have a responsibility to be leaders for volunteering within their industry group, within the business community, and in the communities in which they do business.

### **Put the PIs to Work for You**

In 2010, we did a “short form” of the PIs to facilitate their use. It consists of nine Indicators, and 27 Measures.

You will find it in Appendix B. Make a photocopy of it, find a time when you won't be disturbed, settle into a comfortable and quiet place and see how your company comes out.

In the box that follows, we describe how you might use the PIs in a small team setting.

In keeping with the approach we articulated at the outset of this book, this is a way to “create the moment and stimulate the dialogue.” It is less the hard numerical data that is important than it is the meaning you make of that data and how you decide to put that meaning to work in improving your volunteer efforts.

### Using the PIs with Your Leadership Team

We believe that one of the most beneficial ways to use the PIs is with the team of people most directly responsible for leading a company's volunteer efforts. That allows for those with the most expertise and broadest perspective to do a collective self-assessment.

Once everyone has completed the PIs, gather as a group and compare responses. Identify where you agree and where you differ. Challenge each other's assumptions and ratings. As you work toward a shared rating, list the key evidence that supports it – both negative and positive.

Ask these questions about each Indicator and each Measure:

- How comfortable are we with the score we gave to this item?

This is a question about what you **value**.

Some people will look at a score of 3 out of the 6 possible for each Indicator and be content with it. Some will look at a 5 and wonder how to raise that score!

Understanding your “comfort level” helps you decide what is most important to work on improving.

- How important is it to us that we raise our rating or score on this item?

This is a question about your **priorities**.

A key factor to consider here is the “current reality” of your company and the environment in which you are working. Is it likely to be important to your company to raise a particular score?

Is each Indicator, each Measure relevant to where your company is right now? An example: a company that we interviewed during the GVCV research is investing a great deal in the development of its volunteer program. But it very deliberately is not joining groups like GVCV or taking a visible role as a “leader of volunteering.” They believe they need to get their program in place first and then become more externally focused. Thus the “Leadership for Business and Community” Indicator is not currently relevant to them.

- How can we raise our score?

This is a question about **strategy and tactics**. Are there “easy wins” you can achieve – maximum return on minimum investment? Are there process improvements? Given your analysis of what led to a relatively low score, what are the specific steps to improve?

- What human, financial or other resources will be required?

This is a question about **investment**. What will the direct costs be to implement a new or an improved approach?

What is the cost of the effort it will take to gain approval – the time to develop and sell the idea, to reach out to those whose support will be required, the opportunities you cannot pursue while doing that, etc.?

What are the hidden costs? That is, something may not cost much to set up but if it required significant additional work for others, its ripples through the company could be costly, both in time/dollars and potential erosion of support for your program.

Is it worth the effort? This is a judgment call. The question of what constitutes an acceptable return on investment may well differ from item to item.

- How do we move forward with this?

This question is about the **plan of action** that you need to develop to make progress.

### BCCCC Mapping Success in Employee Volunteering

In 2009, the Boston College Center for Corporate Citizenship (BCCCC) published *Mapping Success in Employee Volunteering* by Bea Bocalandro, a member of their faculty and also an independent consultant. In it, she identifies six practices or “drivers” that “generate community and company impact.” (Bocalandro 2009.)

You can find the report online by going to the BCCCC website, [www.bcccc.net](http://www.bcccc.net), and searching the Research section.

In the report, the descriptive term used for what we call corporate volunteering is “employee volunteering and giving programs” or EVGPs.

The six “drivers of effectiveness” are:

- Cause-effective Configuration – Highly effective EVGPs are structured to support social causes and nonprofit partners productively.
- Strategic Business Positioning – Highly effective EVGPs are internally positioned to contribute toward business success.
- Sufficient Investment – Highly effective EVGPs receive company resources commensurate with corporate efforts of similar scope.
- Culture of Engagement – Highly effective EVGPs benefit from companywide facilitation and encouragement of employee involvement in the community.
- Strong Participation – Highly effective EVGPs have meaningful levels of involvement from their employees.

- Actionable Evaluation – Highly effective EVGPs track their efforts, hold themselves accountable to their outcome goals and implement evidence-based improvements.

According to the report, the drivers were developed from “a thorough review of relevant research and other information from [BCCCC] and other organizations.” The practices thus identified are ones “for which there is sound evidence of associated community or company impact.”

The resulting drivers were reviewed by a dozen “experts in the field.” They were also tested against what is described as “the only existing formal measure of effectiveness” for corporate volunteering: “awards programs wholly or partially based on employee volunteering.” The awards used were ones given by the Points of Light Institute, the Conference Board and the U.S. Chamber of Commerce.

Every Fortune 500 company was invited to participate in a self-assessment survey using an online tool based on the drivers. For each driver, there are a series of indicators and for each indicator one or more survey questions. Thus, it is possible to see what percentage of the responding companies meet each indicator. The responding companies, a total of 203, also were asked to give feedback on the drivers.

To break the suspense that undoubtedly is building in your mind, we’ll give you the results. Less than 40% of the responding companies were meeting the indicators in any of the drivers. The highest (38%) were meeting in Strategic Business Positioning; the lowest (6%) in Strong Participation, followed closely by Sufficient Investment (13%).

The study itself highlights three significant limitations to the drivers. First, there is a paucity of data about the effectiveness of corporate volunteer programs from which to build a profile of what contributes to effectiveness. Second, “the drivers are standard and companies are not” – that is, not all of the drivers may be relevant to every company.

Finally, the work begins with the assumption that the volunteer program “benefits from standard companywide policies, procedures, practices and systems that support the basic functioning of any business unit.”

As we discovered in the GCVC research, the latter may not, in fact, be the case. We found an absence in many companies of consistent expectations across the company for how volunteering would be organized, resourced and supported. A significant operational shortcoming reported to us was in the weakness or even the absence of companywide reporting systems.

### Our Assessment

Overall, the drivers and their associated indicators make a good deal of sense. It would be possible to take the complete tool apart and critique each component, particularly at the level of the questions asked for each indicator – just as it would be for the Performance Indicators. But, even then, the concepts would remain strong. It is important, for example, for there to be “sufficient investment” and an appropriately supportive corporate culture.

We have three concerns that merit discussion.

**First**, this is a decidedly American tool. It does not purport to be otherwise. There is nothing wrong with that. It simply will likely limit its utility globally.

While Fortune 500 companies may operate globally and be members of the three organizations whose awards programs were used to build the drivers, that does not assure that they bring a global perspective to their volunteer efforts.

Our observation at the meetings of IAVE’s Global Corporate Volunteer Council, for example, has been that there is a very different discussion when non-U.S. based companies are participating than when it is only American folks talking about their “international programs.”

**Second**, there is no opportunity for companies to assess the extent to which they are meeting an indicator. Questions are essentially “yes” or “no.” How does a company that does something sometimes or in some places respond? How often or how widespread does an activity need to be to qualify for a “yes” response? If it is not being done everywhere in the company, does that mean the answer is “no?” The reality of how corporate volunteering is implemented in companies may not allow for absolute responses.

**Third**, the indicators for Sufficient Investment and Strong Participation trouble us because they move toward formulation of quantifiable “standards” that may not be appropriate, particularly at the global level. Let’s take those apart a bit.

For Sufficient Investment, the indicators are (1) an expenditure of \$30 per employee, not counting salaries and philanthropic grants, to support the volunteer effort; and, (2) at least one full-time paid professional position, devoted to the volunteer effort, for every 10,000 employees, not less than two total, to manage the program – but not to organize events.

The process to derive these standards used data available for what U.S. companies spend for workplace training. The rationale is that while training and volunteering are not the same, they are “sufficiently similar” even though they are not “comparable in any substantive way.” They both get employees involved in activities that “are beneficial to both company and employee.”

Thus it is concluded that each hour of employee volunteering costs a company \$3.80 in out-of-pocket costs which when multiplied by the expected eight hours of volunteering per employee per year gives the \$30 total. The staffing standard is derived in the same general way.

Appropriately and predictably, the companies surveyed did not respond well to these standards since virtually none were meeting them. The report defends the standards as presenting "what size investment research suggests is necessary."

We hope that in a future revision consideration will be given to examining how companies currently staff their programs and comparing that to the perceived level of effectiveness of their efforts.

For Strong Participation, the study calls for at least 50% of employees participating (met by 8% of responding companies) and an average of eight hours of volunteering per employee per year (met by 5% of responding companies).

Again, we believe the logic leading to these is flawed. For the 50% participation level, it is simply an assertion that "research suggests that majority... participation... is sufficient to accrue meaningful employee benefits." But the research is not described nor cited so cannot be evaluated.

This approach seems to suggest that "meaningful employee benefits" are more important than the benefits to the community or to the company overall. Clearly, from the experience of hundreds of companies, majority participation is not needed to have a significant impact in the community. Actions of a relative handful of employees in a well-structured and appropriately resourced program focused on a specific need can have a far greater impact than thousands of employees doing a full day of service in relatively routine, although perhaps needed, physical chores.

The calculation of the eight hours per employee per year cites research that "meaningful employee benefits require at least two days of volunteer activity per year." Without digging into it, let's grant that makes sense – the more one does something that is inherently positive for them, within logical limits, the more beneficial.

The next step is to assert that nonprofits are better served by skills-based volunteering and that this type of volunteering takes more than a few hours. Again, OK, although it could be argued that it may also be that staff time committed to setting up the assignment is a critical component, not just the number of volunteer hours, that is important.

These two then are combined to set a standard of 16 hours of volunteering per employee per year. But because there is the 50% participation rate standard, that is cut in half to eight hours a year.

### Does It Matter?

There are two significant reasons to worry about the issues raised here.

**First**, there is the danger that the “standards” articulated in the study will begin to be cited as having some special validity. We do not believe they do, for the reasons outlined above. It would be inappropriate to turn them into something they are not, particularly without careful scrutiny.

**Second**, the “Americaness” of the work undercuts its usefulness on a global scale. It is no more appropriate to use these calculations to establish some expectation of a participation level than it would be to adopt the experience of South Korean companies who report 90+% of their employees as volunteers – which, if evaluated in the context of corporate and societal culture and practice, would prove not very useful to most other companies in the world.

### Put the Drivers to Work for You

Despite the issues we have raised, we believe this tool can provide helpful insight into a company’s volunteer efforts. Using it and giving feedback on it, as with all of the tools and resources identified in this book, are important ways to engage in the ongoing developmental process that strengthens the field.

The “Drivers of Effectiveness Survey Benchmarking Tool,” is available online at [www.volunteerbenchmark.com](http://www.volunteerbenchmark.com). The tool is free, available to all and generates a report back to the user. Bea Boccalandro tells us that, as of the summer of 2011, 300+ companies had responded to the tool.

### Move to Action

- Begin with the Performance Indicators in Appendix B. Complete it for yourself and reflect on what you believe you have learned from it.
- If you find the PIs helpful, make copies of the Appendix available to the team of folks most responsible for volunteering in your company. Ask each to complete, then bring them together to do shared analysis and identify action steps you might take to improve performance.
- Try the Drivers of Effectiveness Survey Benchmarking Tool online. As you work through it and after you have a chance to review the benchmark report, consider its value to you and how best to share it with others.
- An interesting possible variation on the “Drivers Survey” would be to gather your team and work through it together, recording what all agree on as the appropriate answer to each question. If there are items on which there is significant disagreement, take the time needed to talk through the what and why of the differences.

## Closing Thoughts

Both personal experience in developing the Performance Indicators and analysis of the BCCCC “drivers tool” raise two critical questions.

- Does the field need objective “standards” against which companies can measure themselves?
- Is it even possible to develop such “standards,” particularly at the global level?

Such standards might include what Bea Boccalandro was seeking to do by calculating how much a company should spend on its volunteer efforts, how many staff members they should have and what level of participation is desirable.

A major problem in doing this is the determination of which companies’ experience should be used as the basis for the calculation. Awards programs by necessity include some degree of subjective judgment. Otherwise there would be no need for panels of judges. It would be sufficient for staff to rate and calculate scores.

An interesting question would be whether those awards programs would be willing to use the measures derived from their past winners’ experience as future criteria for awards. That is, will they recognize companies that have lower than 50% participation or spend less per employee and so on?

It seems unrealistic to imagine that any truly valid and useful global tool can be developed. There are simply too many differences among companies and countries.

Such standards also undercut what I would argue is the true benefit of the “big tent” that we discovered in our global research. In that diversity there is beauty. In that diversity there are people and institutions finding their own natural levels of interest, commitment, and investment. In that diversity there is both creativity and innovation.

The rise of “standards” threatens to create classes of companies and that, in the long run, will change the valuable reality of corporate volunteering inherent in today’s diversity.



# Chapter 15

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## Assessing Impact

“Location. Location. Location.”

That is the traditional response given by real estate agents when asked the three most important factors in selling property.

A bit apocryphal, perhaps, but it is true that the grand home in the less desirable neighborhood may be worth less than the modest home in the great neighborhood. Presumably, woe be to the modest home in the modest neighborhood, caught between the extremes.

Now, the world of corporate volunteering has its own new easy-to-recall mantra.

“Impact. Impact. Impact.”

Increasingly, the driving force of corporate volunteering seems to be its ability to have a demonstrable, usually quantifiable impact on whatever problem, need, community or target audience on which it has its sights.

From where does this desire for impact – presumably always positive – come? Here are three likely motivators.

**First**, it is a reflection of human nature. We want to believe we have value to others, that we “make a difference” to the world, that our work is valuable.

Certainly that is true in our volunteer lives. If we are tutoring children, we want to believe that they are learning more than if we were not there. If we are planting trees, we want to believe that we have planted enough to help mediate climate change. If we are visiting seniors, we want to believe that we are helping them remain independent and to feel valued.

**Second**, our disillusionment with the effectiveness of the institutions of society on which we depend may lead us to demand better monitoring which leads to more measurement. When we realize that the schools are not educating our children adequately to enable them to be employed, that unsafe food has made it through the inspection system, that a “miracle drug” is not saving lives – when we are faced with the failure of those institutions, whether government, business or NGO – then in our well-founded demand for change, we may assume that measuring impact will bring that change.

**Third**, it is an example being set by the super-wealthy, the new philanthropists, the people like Bill Gates who has committed to give away much of his fortune and is now engaged in a worldwide crusade to persuade other billionaires to make the same pledge.

As *The Economist* (2011a) pointed out in an article on philanthropists, “Modern philanthropists are typically self-made, so they are used to getting things done... The way

they measure their success is not by how much they disburse but by the return they earn on their charitable investment, measured in lives saved or improved.”

The titles of three books published in 2011 reflect the emphasis on impact that is taking hold in philanthropy: *Leap of Reason: Managing to Outcomes in an Era of Scarcity* (Mario Marino); *Give Smart: Philanthropy that Gets Results* (Thomas Tierney and Joel Fleishman); *Do More than Give: The Six Practices of Donors Who Change the World* (Leslie Crutchfield, John Kania and Mark Kramer).

Now, don't be misled. We are not building up to an anti-impact creed. That would be ludicrous.

Impact is good. It is highly desirable. It, in fact, is critical. As Mario Marino (2011) writes, “The time to dramatically improve our collective impact is now, when we are needed most.”

But we do want to sound a bit of a cautionary note.

Impact is not easy to achieve. It is not easy to measure – indeed, it cannot necessarily be measured. And, the target for expected impact is not always easy to agree on – one person's desired impact is another person's wasted effort, a conflict based on differing priorities.

Here are just a few concerns to ponder.

**Not all impact can be known, let alone quantified.** A fair share of volunteering is in situations where the volunteer is working directly with people who are considered to be “in need.” If their work is sufficiently focused, goals are set and measurement practices are in place, it may be possible to determine whether they met their goals, whether the desired change occurred.

But how do we assess the full impact on either the person “in need” or, indeed, on the volunteer herself? If we pause to think back on people who helped us over the course of our lives, was that help overt, measurable, or was it a matter of more subtle influence, motivation or just caring about us when we needed it?

I once received an email from a woman who had served as an intern some years before in an organization where I was in a leadership role. She was writing to thank me for the help I gave her, for my encouragement and support, telling me about what a satisfying career in government she had gone on to have. To tell the truth, I had no memory of her whatever, not even a vague mental image of her in that workplace. I had had an unknown impact, one that, had it not been for her very kind email, would never have been recorded.

Remember the **Disney** and **American Airlines** examples we related earlier. What does it mean to a child who is having a wish granted? There is no “Happy Meter” that can measure the impact on the child, the family or the volunteers who are making it happen.

We know it is there. But we can't measure it. That lack of ability to measure does not undercut the very real value of the work.

What it does suggest is that there is much we can demonstrate about our impact through the telling of stories. The woman who emailed me told me her story and the role I played in it. I did not need to send her a survey, compare her responses to those of others with whom I have worked over the years, analyze data. The story was the data.

There may not be a “Happy Meter,” but if there was, the needle on it would move because of the stories people tell.

Stories are a way in which we make sense of our lives, our work and our world. Their power cannot be underestimated.

Indeed, in the research I did on why some NGOs are more effective than others in engaging volunteers (Allen 1992), one of the key characteristics of the more effective organizations was that stories of the contributions of volunteers – both historically and currently – were shared among both paid staff and volunteers.

The growing ubiquity of social media now makes it possible for anyone to tell his or her story to whatever audience wants to hear or read it. A challenge for companies is to determine the best way to encourage and share the stories their volunteers and the beneficiaries of their service want to tell.

**Too much emphasis on measurement may constrain what we undertake.** No less than George Soros, no slouch as a global philanthropist, believes there is too much focus on quantifying results. He told an interviewer from the *Chronicle of Philanthropy* (Preston 2011), “That is a false track. By insisting on measurable achievements, [donors] very often distort the objective, and that distorts the results, too.”

For Soros, the riskiest projects, the ones with the lowest potential for success, may be the most important, thus leading to something of a trial-and-error approach to his giving.

As a means of comparison, the article also quotes Peter Lewis, a friend of Soros and corporate executive. “I’m obsessed with trying to see that the money I donate accomplishes all the purposes for which I have donated it, and so I care about the way the organizations I support are managed. George doesn’t care as much about those things; he cares about ideas and people.”

In our world of volunteering, will a desire for measurable results lead us only to those activities for which measurement is realistically possible? Will it take us only to “low-hanging fruit,” to projects that lend themselves to “quick and dirty” measurement?

Given the common and understandable desire for volunteering to add value to a company’s brand, will we be more inclined to take on the relatively “safer” projects for which results can be measured easily and/or for which positive results are more likely?

As just one example, will we react to disasters with immediacy, appropriately counting and announcing how much money, food, in-kind products, etc. that we have provided – and then, when the initial media attention dies down and the hard slog to rebuild takes hold, when measurable results are harder to come by, will we move our attention elsewhere?

Will we be inclined away from new ideas, innovations, unproven approaches to problem-solving because they may reduce our chances to have measurable results?

**How will we handle failure?** Not everything succeeds. One of the predictable outcomes of measurement is to record our failures as well as our successes.

Are we prepared to fail? More importantly, are our companies, our leaders, our volunteers prepared to fail? What happens when the data makes it clear that we have not achieved much of anything, let alone our original objectives?

For those managing corporate volunteer programs, the answers may rest in the degree of security we feel, for our programs and even for ourselves, within the company. Can we afford to fail? Or do we feel so far out on the margins of the company that failure is not an option?

This is not to say that we should not measure. It is to remind us that we need to be prepared for outcomes that we do not expect, outcomes that at times may undercut the rationale for the investment we have made.

It also supports our notion that volunteering needs to be subjected to the same management standards as the rest of the business. Clearly, not every business venture, not every new product or service, not every acquisition or merger, is a success. Successful companies recognize and learn from failure.

In some ways, volunteer efforts should be seen in the context of “research and development,” a bit of a laboratory of creative ideas and social innovations, as opportunities for employees to find and test new ways to bring meaningful change to their communities. That means there must be room for failure, not to deliberately seek it out but not to avoid it by taking the safe road either.

**Both making an impact and measuring it requires investment.** Planning for measurement – whether it is simply counting inputs and outputs or assessing impact – begins long before the work itself, in the initial conceptualization of an activity. That again demands management rigor to establish goals, define measurable objectives, decide what and how to measure, etc. Projects need to be structured to maximize the likelihood of impact – strong partnerships need to be forged, volunteers need to be effectively prepared for their work and managed throughout it, appropriate resources need to be allocated to support the work.

All of that demands an investment of time on the part of management and operating staff and of money.

More investment is required to actually do the measuring and to learn from it. Appropriate data collection systems need to be created and sustained. Time must be invested in analyzing and interpreting the data. Invariably, reports must be written, there must be consultation with management, decisions must be made about future activities.

The requirement for investment is not a reason to avoid evaluation. It is, however, a reality that must be recognized and for which planning must be done. Decisions need to be made at the outset about what kind and how much evaluation will meet the needs of the company. If, as is usually the case, we cannot invest in rigorous pre- and post-models of evaluation, then we need to decide what short of that will give us the insight on the impact of our work that we want, need and can live with.

**It may not be useful anyway.** In a provocative opinion piece in the *Chronicle of Philanthropy*, William Schambra (2011), director of Hudson Institute's Bradley Center for Philanthropy and Civil Renewal, is sharply critical of what he sees as the growing demand by funders for more and more measurement that, for the most part, is ill-used.

He points out that measurement in philanthropy is not new, actually dating to the early 20<sup>th</sup> century, but that its practice “has itself apparently had so little measurable impact on the way we do business that a full century later, we’re talking about measuring impact as if we’ve just discovered the concept.”

NGOs now face the burden of responding to multiple systems of measurement from foundations and governments and to the not uncommon changes in those systems as new approaches appear.

Worse, Schambra argues that there is usually little use made of all of the data collected. It is not usually aggregated across similar projects; it is largely ignored by funders who must focus on the next round of grants, not past ones; and it is rarely used in the decision-making concerning future grants.

Referring to what he calls the “gold standard of measurement,” using randomized control groups, he says, “But for most serious social interventions, rigorous experimental testing is ethically problematic, extremely expensive, and yields results long after they would be useful for decision-making.”

The answer, he believes, rests in “a simple, coherent user-friendly system” that both funders (or corporate volunteer managers, in our case) and NGOs can live with.

## The Performance Gap

We discovered in our research on global companies that a professed interest in and desire for assessment of the impact of their volunteer efforts was rarely translated into actually doing it. A small minority of the 48 companies interviewed could be said to be doing any meaningful impact evaluation.

They are not alone. The study by the Global Reporting Initiative (2008) that we cited in Chapter 13 found:

Companies usually focus on reporting their own performance in relation to community initiatives as opposed to what changes or benefits occur for people and the environment as a result of their activities. Thus, it is often difficult to paint a picture of community impact.

From the Conclusions section of the report:

What is clear is that measuring a company’s impact on communities is not an easy task.

Companies find it very difficult to measure their impacts. It is relatively easy to report on inputs and performance but much more difficult to assess the difference that community investments make. Companies would benefit from a more systematic approach to assessing the impacts of their community investments through tools aimed at measuring the differences that occur (positive and negative) over time.

## A Different Perspective

When I went to visit Anant Nadkarni at **Tata Group** in Mumbai, he shared an interesting insight as to why the gap between professed value and performance may exist. Anant is vice president, Group Corporate Sustainability, and also heads the secretariat of the

Tata Council for Community Initiatives. TCCI exists to help the 100+ companies in the Tata Group and their employees engage in the community.

It was a typically hot December day when I was there. Even in the company of my IAVE colleague from Delhi, Indira Dasgupta, and with a bit of help from our taxi driver, it was still a challenge to find Anant's office, a search which ended with a four block walk through crowded streets. Not in a shining corporate tower, TCCI is housed on the second floor of a rather modest building in a hectic commercial neighborhood.

Anant gave us a warm welcome and immediately began to explain the history and philosophy that underpin the unique Tata culture, which we have shared in Chapter 9. He was generous with his time – several hours, interrupted only by the occasional phone call and a drop-in visitor – and even more generous with his insights, honed through his extensive business career.

Although I took careful notes, when I sent back to him what I thought was an accurate quote, Anant graciously rewrote it into a fuller statement. Here is what he said about the challenge that impact evaluation poses to businesses:

Business knows outcomes for the quarter or the annual cycles, and is not so much focused on impact. Impact is beyond the “business” language, more in terms of long-term human well-being and value. Volunteers, by nature, are more self-driven, proactive and focused on ultimate consequences – so tend to have long-term vision. They are willing to wait for the more distant future. CEOs generally don't have that total perspective.

He goes on to suggest five areas in which impact evaluation of volunteering is critical:

- Is it creating a culture of innovation?
- Is it sustainable innovation – that is, is it good for human well-being?
- Is it innovation that is making transformational change in social values?
- Is it developing people's passions, talents, skills?
- Is it strengthening the company's reputation?

Much of Tata's evaluation of their broad array of community initiatives, not only those that engage employees as volunteers, is done through its case study methodology that provides a formal template for reporting social development projects. It collects background data, descriptions of activities, output data – but, more importantly, it is a framework for story-telling, reflection and analysis, a way to “share the learnings and what it is about the project that excites everyone to take it forward: what finally changed among people, what changed for you (Tata Group 2010).”

The template for the Tata case grew from a desire to “uniformly understand and document human achievements in the many stories that were coming from the Tata companies through a common understanding and template... [that]... captured a story for one or a cluster of similar ideas in about three to four pages.” In keeping with the spirit of “Tata-ness,” Anant has allowed us to share the structure of the template in the accompanying box.

Its concluding sentence closely aligns with our belief in “inspiring practices.” It reads: “All in all, the entire experience should inspire others to consider your idea.”

### The Tata Case Study Template

- Describe the situations and concerns that prompted the initiative: One needed to begin with a brief description of how and why a particular idea evolved, what was the driver, what specific needs and concerns did it serve, for e.g. Health, Education, Women, Children and so on.
- Describe the significant contribution that the business community could make: Why did the Tata company involve itself, what competencies did it bring or what was the innovation or breakthrough needed for the issue to be resolved and so on.
- Describe the key communities/stakeholders: What were the major changes identified for this idea to succeed in terms of processes/traditions/habits and so on.
- Summarize the actual action and the numbers: What was the specific strategy, schedule or work plan. What special arrangements or processes were required to drive it effectively, who were the people working, which human indicators were addressed and so on.
- Showcase how the activities build cumulative capital or value: human, social, natural, economic and so on. Provide good high-resolution photographs about tangibles like chulas, biogas plants and so on.
- Describe the final achievement: Provide details about the progress that was monitored and how communities resolved conflict, state the social or economic goals for the future, what is expected of employees, advise what would be a more sustainable model of action around the idea, how will it be useful to other companies in the Group, have any sustainable livelihoods been built and how alliances and partnerships have happened.
- Share the learnings and what it is about the project that excites everyone to take it forward: what finally changed among people, what changed for you. List any mistakes that were made and highlight any challenges.
- State what the management is committed to do and how a cycle of continuous improvement sets in. Comment on the analysis and synthesis of information, experiences, knowledge. Here a quote from the CEO, a senior executive, concerned officer is necessary along with photographs. All in all, the entire experience should inspire others to consider your idea.

## Inspiring Practices

We did find in our research some very strong examples of impact evaluation that can be labeled “inspiring practices.”

At **Tata Consultancy Services**, for example, employee volunteers design impact evaluation approaches for specific programs being undertaken through their Maitree employee association. Often this is through surveys of what they have identified as their “beneficiary community,” including ones done pre- and post-intervention, to understand the differences their actions have made.

**Pfizer** has been a clear leader in impact evaluation. Since 2003, it has worked with Boston University’s Center for Global Health & Development to evaluate the performance of Pfizer volunteers in their Global Health Fellows program against the specific professional development objectives of their assignment and to assess the social impact of the program. The result has been a set of tools and measures that can be adopted and adapted by other companies to assess their cross-border volunteer efforts.

Indeed, as we reported in Chapter 12, each of the five companies, including Pfizer, that we profiled in the final research report on their cross-border volunteer efforts are actively engaged in evaluation and learning.

**HSBC** in Brazil is developing a multi-faceted approach to evaluate their volunteer projects:

- measures of the outputs, the results;
- perceptions of their NGO partners and/or the direct beneficiaries of the project as to what has changed for them as a result of the work – for example: “the children can now write better;”
- a pre-project survey of employee volunteers to identify the skills they think they may develop through their participation and a post-project survey to determine whether that occurred;
- volunteer input on what they would change in the process of the project to make it more effective;
- indicators for each of the project’s goals and objectives to determine whether they were met.

A key to the successful development and implementation of all of these components is the creation of indicators and questions that are straightforward and for which it is easy to gather responses.

### Learn to Love Your NGO Partners and Their Metrics

HSBC’s use of the perception of their NGO partners is similar to the practice of other companies that take similar approaches. At **GE**, Paul Bueker, director of GE Volunteers,

tells us there is a belief that impact evaluation “is a natural part of the development of partnerships with NGOs. We are committed to helping them achieve their missions.” As a result, the metrics used by those partners are seen as a valid measure for GE as well.

Historically, **Motorola** preferred to start with proven models for evaluation, finding the burden of starting from scratch not to be cost effective. They looked to their partners to lead the way. For example, First Robotics, with which the company partnered to put volunteer engineers and scientists together with middle and high school students, worked with research organizations and universities to develop evidence of its impact on students’ academic performance and career choices.

The Motorola Foundation funded a collaborative effort by the Girl Scouts of America and the National Center for Women and IT to research promising practices in informal IT and science education for girls. By identifying what had proven to work, the company could be assured that volunteer and financial investment in programs using those approaches would have an impact.

**Dow** sees what happens with their NGO partners after their volunteers’ work has ended as a valid reflection of the impact of their work. They might ask questions like these on a project in which volunteers were working to build the capacity of an NGO: Were volunteers’ recommendations for organizational changes implemented? What happened as a result? Did service delivery or production increase? Did they raise more money? Were they more able to scale up their efforts?

Note that this is **not** about asking NGOs to assess the work of the volunteers. Rather, it is about developing sufficient respect for and trust in partners to be able to comfortably rely on the metrics they use to assess and describe the impact of their work.

It is also about accepting proxy data about the benefits of proven models. In the Motorola case, research had shown what works in informal science and IT education for girls. Replication of those efforts is likely to have the same positive results that have already been proven.

There is no need for endless repetition of the same research. Rather, attention can be given to the accurate replication of the proven practice – ensuring that the NGO partner has the capacity, knowledge and skills to do the work and that volunteers are appropriately trained and managed.

It may also mean that there needs to be a case made within the company for the validity of existing NGO metrics and of proxy data.

### Models for Assessing Impact

Here are two models for assessing impact that seem to have a great deal of “face validity” – that is, they make sense.

The first, developed by the London Benchmarking Group (LBG), the folks we met in Chapter 13, looks not only at inputs and outputs but at longer term benefits of an effort, using rich descriptive detail to describe but not necessarily quantify benefits.

The second, developed by Farron Levy of True Impact LLC, uses a somewhat similar approach but more overtly seeks to calculate the monetized contribution of corporate volunteering to bottom-line business results.

Both provide conceptual and practical approaches to making assessment of impact a more realistic exercise.

### London Benchmarking Group

A great example of how the LBG model works is outlined in the case study of **BD's** volunteer program in Zambia, the first of what has grown into a continuing series of Volunteer Service Trips. Done in partnership with the Catholic Medical Mission Board (CMMB), the project took 10 BD employees from around the world to Zambia for two weeks to work at five sites.

The case study was prepared by the Corporate Citizenship consultancy (undated), headquartered in London, the founder and ongoing manager of LBG.

The assessment model is quickly summarized:

[LBG] aims to quantify the total contributions to the programs (inputs), the benefits to the community and to the business of these contributions (outputs) and, finally, to explore the longer term benefits or “impacts” of the program. This offers a way to measure the success of the program – by comparing the ratio between the “inputs” (our contribution) and the “outputs” (benefits achieved).

LBG classifies inputs as cash, time (in this case, volunteers), in-kind (products) and management costs. The cost of each was quantified – the cash contribution was precisely known; donated products were at “fair market value” and time was “conservatively valued.” For the volunteer time, “an estimate of the average salaries of BD associates at similar job levels” was used.

The outputs are leverage, community benefits (local and global) and business benefits.

Leverage is “the additional resource attracted to an activity or project as a direct result of the initiative or participation of the company.” LBG includes this “to show that company contributions can act as the catalyst for increasing resources to community projects.”

In this case, BD employees raised money; the company used business connections to secure in-kind contributions from other companies; and their NGO partner contributed a significant amount of project management time. The total leverage value was almost 25% of the value of the inputs.

LBG breaks benefits to the community into local and global. Although the benefits were not quantified, they were described in such rich detail that their value seemed obvious and clear.

At the local level, lab processes and set-ups were improved and workers were trained. A team of local people responsible for constructing new buildings and renovating existing facilities were given new tools and skills to do the work. Volunteers built two new incinerators, a new laboratory and other facilities – and so on.

**Of particular importance is what LBG calls the “leveraged benefits” – that is, the longer-term ripple effects from the work that was done.** For example, because they now have better-equipped and better-managed labs, the hospitals will have greater likelihood of securing new funding and are eligible for government support.

At the global level, it was possible to describe specific benefits to CMMB beyond the obvious of advancing their program objectives. These included a stronger relationship with BD; the decision to take a new approach to involving corporate volunteers, broadening from just healthcare professionals on long-term assignments; increased credibility and visibility that has enhanced their fundraising.

The benefits to BD were not quantified but, again, were well described. Most of those benefits centered on the volunteers, not surprisingly. In interviews, they described how the program gave them “a changed personal outlook on life;” the opportunity to develop and/or practice new skills; increased morale and a commitment to remain with the company.

Significantly, the volunteers reported that the project gave them “a direct experience and knowledge of healthcare needs in the developing world... an understanding of the real challenges, priorities and needs on the ground... that could directly influence the company’s ability to respond to these needs with appropriate products for use in these markets.”

More broadly, there was a sense that the program enabled the company to make its mission of “helping all people lead healthy lives” real in a way that was visible to all employees. Working with its NGO partner helped develop BD’s internal project management capacity, thus enhancing its capacity to run future projects. It is also a vehicle to call attention externally to the company’s mission and social contribution.

Finally, LBG considers the longer-term impacts. This is, perhaps necessarily, the weakest, most speculative component of their model. They acknowledge that, “in most cases, it takes time for impacts to be felt and they are often difficult to measure.”

Thus, they use the outputs to project “potential impacts,” noting that it appears from interviews with volunteers and CMMB that some are already real but that “for others, it would be necessary to do more extensive impact assessment.” The potential impacts they outline seem plausible, logical, but certainly not assured.

For more information about LBG, begin at their website – [www.lbg-online.net/](http://www.lbg-online.net/).

### **True Impact**

Farron Levy, president of the consultancy True Impact LLC in the U.S., has worked with the Points of Light Institute to develop very innovative tools that companies can use to calculate the return on investment of their volunteer activities.

They have come the closest of anyone we have seen to quantifying, in a logical and defensible way, the business value of corporate volunteering. By including companies in the development and initial demonstration of the whole approach, they have built credibility and support. By providing a turnkey approach with complete reporting and opportunities for benchmarking, they have reduced the investment required and enhanced the value received.

The work is based on the recognition that corporate efforts to promote “social” goals also provide measurable business value that directly contributes to achieving business goals and affecting the bottom-line.

But, Levy (2010) argues, most companies content themselves with measures of inputs and outputs, failing to take the step of measuring that business value and, thus, failing to apply the same management standards that they would use in their “business” activities to their community involvement.

The True Impact approach, then, is built on three core principles.

First, “focus on the bottom line.” To what extent does a particular community involvement activity help to either increase revenues or to reduce costs? Similarly, how does the service provided to the company translate into a monetized value for those benefited?

Second, “use proxy data when necessary.” What data already exists that can support the calculation of value? For example, if an activity generates media exposure for the company, what is the already accepted value of each impression? It is not necessary to re-invent that which already exists, is commonly accepted or may stand the test of “informed speculation.”

Third, “plan for measurement as soon as possible.” The time to plan for evaluation is at the beginning of an activity, when it is in its planning stages, not halfway through implementation or at completion. It needs to be an integral part of the overall operational plan with recognition of what steps need to be taken throughout the work to ensure it is being done effectively.

The resulting operational model has four steps:

- Identify internal and external stakeholders for the activity being measured.
- Identify the impacts of the activity in three areas:
  - Activities – that is, work added (cost) or eliminated (benefit) for each stakeholder;
  - Outcomes – the potential results of the activity, both positive and negative;
  - Perceptions – potential impact on reputation and brand equity, both positive and negative.
- Determine the bottom-line effects, ranging from the cost of doing the project to the outcomes actually realized and the perceived impact on perceptions.
- Calculate the bottom-line results using actual or proxy data.

The model requires acceptance of the legitimacy of the proxy data used and of the logic that a given activity has contributed to business goals.

Thus, as an example, if a given activity increases the reputation of the company as a great place to work, it can be argued that it is helping to attract new employees – and that then allows for a calculation of how it has helped reduce recruiting costs using existing data about how much it costs to recruit.

The approach also supports calculating the value of the benefits to the community. Thus, in a straightforward example, if a project improves the job readiness skills of un-

employed adults, it is possible to use proxy data to see the economic and social ripple effects of that. The resulting value is an integral part of the overall value to the company.

So how does this apply to corporate volunteering?

In 2008-09, True Impact and the Points of Light Institute (POLI) partnered on the “Employee Volunteer Program ROI (Return on Investment) Measurement Study.” That has evolved into an ongoing service, the Volunteerism ROI Tracker, available to both corporate members of POLI and non-member companies, focused on generating data about outcomes and impacts.

Companies are asked to provide a weekly or bi-weekly report from their volunteer management system identifying activities done and providing email addresses for employees who volunteered. True Impact/POLI then send an online survey directly to those volunteers and to the organizations with which they worked, analyze the resulting data and provide a report to the company.

The surveys are intended to identify perceived contributions to business goals in areas like sales, recruiting, risk management, skills development and employee satisfaction, with their jobs and with the specific volunteer project.

The reports, according to the True Impact website (2011), are intended to “quantify the business and social impacts of... volunteer activities; anonymously benchmark... performance against other organizations; include recommendations for improvement.”

Learn more about this work at <http://www.trueimpact.com/measuring-volunteerism>.

## Closing Thoughts

At the beginning of Chapter 13, outlining the three chapters dealing with measurement and evaluation, we called assessing impact the “holy grail,” the most sought after, most revered and perhaps most elusive form of evaluation.

At the outset of this chapter, we said that the desire to know whether there has been an impact is a reflection of human nature. We want to believe we have value to others, that we “make a difference” to the world, that our work is valuable.

Now, as we close, it seems that just as we have argued for the value of the diversity inherent in the “big tent” of corporate volunteering, so too must we argue for the value of diversity in how we assess impact.

An understanding of the impact of volunteering can be gained in many ways. We hear it in the stories told by the volunteers, by the organizations they serve, by the people they touch. We see it reflected in the metrics of NGO partners. We project it into the company and devise ways to put economic value to it. We invest in pre- and post-test models to determine if it really happens.

Obviously, depending on the goal and the measurement of precision demanded, each of these will be appropriate at different times in different places.

But none of them is inappropriate or wrong-headed. The challenge to companies is to determine which best fits their needs and realities.



# Reflecting and Projecting

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# Chapter 16

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## Six Major Challenges

There is a great deal of “good news” about corporate volunteering around the world, as we learned in the Global Corporate Volunteering Research Project and as we have tried to convey throughout this book.

But we also learned about and have written here about some of the not-so-good news.

While corporate volunteering has great professed value, there is a gap between that and the actual investment made in it. While it is a dynamic, evolving field of activity, it remains more shaped by forces within companies and beyond than a force that shapes companies.

Let us turn now to looking at specific challenges that the field is facing. Here are my top picks:

- Is it really volunteering?
- The gap between professed value and the reality of investment
- Is it for everyone – or only for some?
- The lack of global learning
- Managing across cultures
- Where are the critics?

This chapter is devoted to discussions of each of these.

### **Is it really volunteering?**

At the end of Chapter 5, I related a story from when I was at university, about how those of us leading a volunteer program sat one night debating our motivations for the work we were doing, about how we were discomfited by the realization that we were “doing it to help ourselves while we were helping others help themselves.”

Forty years ago, it was not considered appropriate to talk about what volunteers “get” from their volunteering. Of course, that was an ostrich-like, head-in-the-sand way of thinking.

The reality is that all of us receive some value back from virtually everything we undertake – even if it is learning that our course of action was either not wise or beyond our capabilities. Our volunteering is no different from any other activities we do – we invest; we realize a return on that investment.

The motivations to volunteer have been studied, debated, analyzed and both praised and criticized for decades. Fortunately, for most of us, the question of whether it is OK

for volunteers to get a return on their investment of time, energy and talent has long been resolved affirmatively.

For some people, their volunteering is in response to a spiritual “call” or fulfills their sense of responsibility or helps them live up to their expectations of themselves or the expectations set by their families (see the discussion of CEO involvement in Chapter 9). For others it is a way to make new social connections... a way to learn new knowledge... to develop new skills... to make connections that can lead to paid employment... to pursue an interest... and on and on and on.

It is no accident that stories about individual volunteer experiences almost invariably include some variation on “I got more than I gave.” That not only is a reality, it is a *good* reality because it becomes a motivation to do more.

**So, when is it not volunteering?** Let’s start with a generally accepted definition of volunteering:

Meaningful work, done for the benefit of others or the society, of one’s own free will and without expectation of immediate financial gain.

Of course, there are lots of possibilities for disagreement about what makes work meaningful and what is beneficial for others. The latter is particularly problematic when volunteering is done in support of various causes or public policy positions. Whether one agrees with a particular position or not, volunteering is volunteering and needs to be recognized and respected as such.

Clearly if the “volunteer” is being directly paid for the work done and/or if the work is being required or coerced, then it is not “volunteering” – and that is where all of this spills over into corporate volunteering.

- Are employees volunteers if they are given time off during their working hours, without losing pay, to participate?
- Are employees volunteers if they are engaged in the community as part of required team building or other required activities?
- Are employees volunteers if they “volunteer” because they believe that not doing so will harm their employment position in some way?

If they aren’t volunteers, then what are they?

And... does anyone care?

Let’s take these a bite at a time.

**Released Time.** This has been an off-and-on issue since the earliest days. The extremist position is that they “are being paid to volunteer.” The more moderate position is that they “are being given the benefit of flexible scheduling.”

The reality is that most released-time policies are relatively limited. Of the global companies we interviewed, most who offer formal released time set it at two days per year. Many simply said that it is up to the discretion of each country or each business unit or even each manager. Two, **IBM** and **Standard Chartered Bank**, explicitly stated that they offer “flex time” for volunteering.

Also, as we discuss later in the context of inclusion – not everyone can have released time because of the nature of their jobs or because a company simply does not extend the policy far enough to include them.

Anecdotal evidence, collected over many years, suggests that many of the people who get released time often simply make up the time later – by coming in a little earlier, staying a little later, working a little harder. Indeed, many managers say that those who use released time to volunteer are among their most productive employees.

Common sense makes it hard to argue that someone getting two days of released time does not in some way give that back to the company in additional hours worked or greater productivity.

My verdict – released time does *not* equate with being paid to volunteer. The people doing it are volunteering, making a conscious choice, and are likely actually doing it on formal or informal flex time.



**Required Participation.** This one is tougher to rationalize. Schools and universities that require students to do a certain number of hours of “community service” do not

refer to the students doing it as volunteers. Someone who stands in front of a judge in a courtroom for a minor offense and receives hours of “community service” as part of punishment is not a volunteer.

Similarly, it seems logical that employees who are *required* to be engaged in the community are not volunteers. Rather, they too are doing a form of “community service.”

This would take in professionals providing pro bono services *at the direction of their employer* who do not have a choice as to whether they do it; people who are required to participate in community service activities as part of a team-building experience; etc.

**Quiet Coercion.** From the outside, when a company tells us that 90+% of their employees “volunteer,” most of us immediately believe that somehow they must be being coerced into it. I am not sure if that is because it seems impossible to imagine that so many people would want to be involved – or if it is a misunderstanding of the national and corporate cultures in which they are living and working.

The same problem exists with fund-raising campaigns in the workplace. Are those people giving freely or are they giving because their manager needs to meet a goal handed down from above?

When specific target numbers for volunteer participation are set by management, does it create a healthy environment of expectation or is it a form of coercion, albeit subtle?

Just as important, what happens to people who do not respond to the expectations or the coercion? Since we have not heard of mass expulsions of non-volunteers from the ranks of global companies, it seems safe to conclude that the repercussions are mild at best.

My verdict – right down the middle. It is all situational and all a matter of perception. If you feel coerced, who am I to tell you that you aren't? But, for the most part, expectations about volunteering are not coercive policies. And, if they are – well, see “required participation” above.

**If they aren't volunteers, what are they?** Way back in Chapter 1, when we were defining corporate volunteering, we referred to the formulation of “employee community engagement” that we attributed to the Corporate Citizenship consultancy in London, consistently among the high quality “thought leaders” for the field. That framework encompasses virtually everything that has been considered “corporate volunteering.”

I am happy to agree that employees who are engaged in the community but are doing so in roles that are not “volunteer” in character, are doing “community service” and fall, with volunteers, into the broader realm of “employee community engagement.”

However, it is a long way from having this somewhat conceptual consideration and explicitly limiting the term “corporate volunteering” to a “pure” definition of volunteering. As we discuss in the next chapter, this seems impractical and, most likely, unacceptable to many if not most in the field.

**Does anyone care?** Evidently. In a paper written for the Centrum für Corporate Citizenship Deutschland, Bea Bocalandro (2011), a faculty member at the Boston College Center for Corporate Citizenship and an independent consultant, argues that the emergence of “strategic” corporate volunteer efforts is undermining “true volunteering.”

“Business benefit might be a hallmark of an effective employee volunteer program,” she writes, “but they are also an affront to our conception of true volunteering.” She believes there are “three ways that strategic employee volunteering chips away at the most hallowed tenets of our concept of true volunteering – that it is altruistic, voluntary and personal...”

Her solution, based on her belief that “business is not an appropriate host for true volunteering,” is to re-conceptualize “employee volunteering” to “employee community engagement.”

For me, this is a fundamental misunderstanding of the reality of volunteering. As argued at the outset of this chapter, volunteering is not without benefit, often consciously planned for and anticipated, for the person who volunteers.

Even Mother Teresa believed she was doing the work her God had called her to do and thus was living her faith in ways that rewarded her.

Were we to eliminate from the ranks of the world's volunteers those who are not demonstrably altruistic – that is, living with a selfless concern for others – we would have far fewer volunteers.

Do the NGOs or the communities that volunteers serve care whether someone is a “true volunteer” or is “being paid to volunteer” or has been loaned to them as part of a work assignment?

More likely they care that the person does a great job for them, meets their expectations and increases their immediate or longer-term capacity to achieve their mission.

Pragmatism usually trumps purity.

What about the ultimate beneficiaries? This is easiest to think about if you imagine people receiving some form of educational, human or social service.

A man I once worked for, a great advocate for volunteering, loved to tell the story of visiting a school and being told of the work of volunteers who helped students improve their reading skills. When he asked one student why he liked working with his volunteer tutor, the child responded, “Because he *wants* to be here – not because he is paid to be here.”

I always took that story as an affront to my father who was a career-long teacher and school administrator. While the student may have been correct that in his case his volunteer was more highly motivated to teach him than was the teacher, it is not universally true that volunteers are better motivated or more skilled or more effective than paid helping professionals. **Volunteers are complements, not replacements.**

Yes, it is true that volunteers bring different motivations, perspectives, and skills than do paid helping professionals. Often they also have the luxury of working one-on-one with someone rather than being called on to attend to many at once. All of this adds to their value for those receiving help.

But is a “true” volunteer actually more likely to bring all of this than someone who is a “less than true” volunteer.

Life is too short for us to draw rigid lines around these things.

Bea Boccalandro may be right that the rise of “strategic” corporate volunteering is undermining more “traditional” forms. The answer, however, is not to reconceptualize and rename the field, removing “pure volunteering” from the workplace.

Rather, it is to reconceptualize “strategic” so that we understand that it is strategic to build comprehensive volunteer efforts – *à la* our “big tent” – that offer opportunities to participate in different ways at different times to all employees.

## The Gap Between Professed Value and the Reality of Investment

This has been a recurring theme throughout this book, just as it was in the final report of our research project: **In too few companies is there an expectation that volunteering will be managed with the same rigor as other business activities.**

What makes it worse is that the investment gap is largely the result of the high professed value of volunteering to the company.

If CEOs were running around giving speeches about how volunteering “is a nice add-on that makes people feel good about the company but doesn’t really have any business

value" then the current level of investment and the level of expectation for management that exists in most companies would not be so bad.

If so much effort wasn't being given to building the "business case" and devising ways to prove it true, then no one would worry about whether volunteering was being well or poorly managed, appropriately funded or under funded.

Yet the professions of value *are* made, both within the company and externally, the case is articulated and demonstrated. So why are companies not universally making the investment in management and support for volunteering that would seem called for?

An easy answer is that companies don't "universally" do much of anything. Some invest in great training and development programs, some don't. Some build eco-friendly facilities, some don't. Some manage their CSR policies and programs as tightly as they do their core business – largely because they consider them integral parts of their core business – some don't.

A cynical answer is that those professing the value don't mean what they say. Let's simply hope that is not true.

A less cynical answer is that volunteering, like many aspects of CSR, remains on the margin of the company. It is "nice to have" but it is not yet essential – getting there but not quite there yet.

In general, it survives but it does not necessarily thrive.

Companies get a tremendous return on a relatively small investment from their volunteer efforts. Employees generally love to participate; they are good for the company image; they look great on the website and in the annual report; CEOs and other top executives like to spend that one day a year "getting their hands dirty."

Will tighter management and more investment get them that much greater a return on their investment?

Clearly some companies believe that it will. Leadership companies – companies like IBM, Telefónica, Samsung, UPS, C&A, Vale, Tata, Standard Chartered Bank, Eli Lilly, Ford, GE, Kraft Foods, Pfizer, SK, National Australia Bank – recognize the overall value of their volunteer efforts to their communities, their employees and the company itself. They not only profess that value but make the investment required to make it real.

I once visited a company a few months after it had reduced its world headquarters staff by around 40%. I was taken through long, dark, mostly empty corridors to a small conference room to meet with two members of the community relations staff.

When I asked them how, in light of the huge “downsizing,” they had decided to maintain their employee volunteer program, the response was immediate: “We owe more to our remaining employees than to the ones who are gone.”

By any reasonable definition, their program had existed on the margin of the company. But in that moment, its existence had a new value to the company and the people who worked there – and, it is easy to imagine, to the communities shaken by the loss of so many jobs.

Sadly, the reality is that in too many companies, the expectation for how corporate volunteering will be managed is nowhere near that for core business operations. The result is to limit what can be accomplished, to hold it on the margin and to lose a significant degree of its potential value.

## Is it for everyone – or only for some?

In a way, this issue also connects with the gap between professed value and reality. It can be captured this way: **“If volunteering has the benefits we say we believe it does, should not those benefits be available to every employee, thus multiplying the impact on community and company as well?”**

Yet, in many companies, volunteering is not available to all employees. This is especially true of what many are now calling the most strategic, highest impact form, skills-based volunteering (SBV). Deloitte (2008), in a survey of HR professionals, found that while 91% endorse the value of SBV, of those who use SBV to cultivate leadership skills only 13% offer it to all employees. They report, “The vast majority of volunteer opportunities offered for the purpose of leadership and skills development are offered to management and above.”

In Chapter 12, we asked, “What is a skill?” and cited several companies that have a broad approach to understanding which of their employees’ skills can be put to work in the community.

**UPS** is an excellent example of this. Read about them in the accompanying box.

### The UPS Experience

Their drivers, safety professionals and other UPSers volunteer on their own time to teach the company’s UPS Road Code<sup>SM</sup> safe driving course for teens and novice drivers. In the U.S., the company offers the program at participating locations of the Boys and Girls Clubs of America. UPS Road Code<sup>SM</sup> is being taught by UPSers in Canada and Europe and will be expanding into the Asia-Pacific region.

At the same time, reflecting its brand focus on “logistics,” UPS has developed a multi-pillar approach with its Humanitarian Relief Program (HRP) to help bring relief to devastated communities. By contributing its intellectual capital, technology and vast global network of supply chain resources, it helps NGOs, governments and United Nations agencies mobilize relief supplies, coping with one of the most vexing challenges during times of crisis.

Another key component of the UPS HRP is its corps of first responders, UPSers who have volunteered and been trained to act as “humanitarian logistics responders” sent in when a disaster strikes a community.

In the U.S., UPS has partnered with the American Red Cross to create the UPS Logistics Action Team of responders. Internationally, UPS collaborates with three competitors, TNT in the Netherlands, Agility Logistics in Kuwait and Maersk in Denmark.

Together they have formed the Logistics Emergency Team to support the World Food Programme (WFP) and the UN Global Logistics Cluster. The teams are located in each region of the world and are prepared to respond when activated by the WFP, typically in situations where more than a half million people are affected by a natural disaster.

For UPS, all skills are to be recognized, respected and put to work.

A variety of other companies are also working on ensuring the inclusiveness of their programs. Here are some examples.

As it was planning its Delicious Difference Week of service, **Kraft Foods** recognized that their line workers cannot step away from the job as those in offices are able to do. So there were evening and weekend service options offered and take-home projects for employees to do with their families – making fleece blankets, assembling and decorating food baskets, making greeting cards.

Similarly, **Marriott** at times brings service projects into their hotels, enabling their workers who cannot leave their jobs to participate in rotating shifts.

Recognizing that its high impact Global Health Fellows program is a small number of their employees, **Pfizer** is aggressively developing a comprehensive program that will ultimately offer all their employees the opportunity to volunteer in a wide variety of ways.

One way that inclusion happens in some companies is through the leadership roles that employee volunteers play in implementing the company's overall volunteer effort.

The idea of volunteers leading volunteers is as old as the field itself, with the **Levi Strauss** Community Involvement Teams as the pioneers. Today, **GE** is an acknowledged leader in building their program around 200+ Volunteer Councils in 50 countries throughout the world, ensuring that volunteering is locally driven, reflective of

the vast differences in GE business units and the ways in which employees can volunteer.

**Vale** launched its signature volunteer effort, Voluntarios Vale in 2004, building a network of 28 employee involvement councils in 40 cities in Brazil, including their mines, transportation facilities and other line operations. Councils include employees from all levels of the company. In 2010, they undertook some 400 projects.

Individual employees who volunteer are themselves key assets in ensuring inclusivity. Throughout the global **AXA** system, “super volunteers” take on project manager roles for the company’s Hearts in Action program with responsibility for organizing projects and mobilizing volunteers. At **Timberland**, it is their Global Stewards who make a two-year commitment to serve as contact person in their facility. **SAP** has a network of more than 250 Volunteer Ambassadors who lead their 39-country, 350-project Global Month of Service. **UBS** has launched a “champions network” in London in which volunteers encourage other employees to participate.

These are “inspiring practices” that deserve attention and, as appropriate, both adaptation and adoption.

## The Lack of Global Learning

Over the course of our research, we learned a great deal about corporate volunteering from many people throughout the world – from the 48 global companies that participated; the 26 “cooperating organizations” that shared their knowledge with us; and the academics, journalists and consultants we interviewed, whose research we reviewed, whose books and articles we read.

We came away impressed, overwhelmed by the amount of knowledge there is in the world about corporate volunteering.

We came away discouraged that there is so little global learning happening.

**There are practical barriers.** While English may be the recognized international language of business, a great deal of business, research, advocacy and reporting happens in the myriad of other languages in the world. The language barrier is very real and is difficult to break through.

**There are perceptual barriers.** An undertone of some conversations was, “What do we have to learn from *them*?” The “them” usually was companies on the other side of the world or in countries someone considers less developed than their own – or even so

much more developed than their own that whatever happens there is too sophisticated for them to imagine.

**There are resource barriers.** It costs money to collect, to make sense of and to share data, experience and knowledge from around the world in a way that is truly globally accessible, even in an Internet-driven world.

**There are self-interest barriers.** More than once in this book, we have discussed the “cottage industry” of NGOs, academics, consultants and others that have grown up around corporate volunteering. Whether they want to admit it or not, they are competitors. The “space” of corporate volunteering will only support so many of them. Each is seeking a way to be “value add” for its target corporate audience. It is rarely seen as “value add” to work together.

**There are hierarchical barriers.** There is too often a sense that learning is only possible through peers or through formal intermediaries and structured activities. V2V, in Brazil, is demonstrating an alternative way. It is an innovative social network that promotes direct contact among volunteers, enabling them to collaborate on projects, support one another and learn from one another. Not only does it create customized and branded social network environments for companies, it offers a way for volunteers to link across companies.

While it is undoubtedly useful to them, it does not constitute global learning when a handful of companies from a single country or region get together to talk about their “international programs.” Global learning happens when people from different countries, different cultures, different frames of reference, different realities come together to share experiences, problems and innovations.

That is the underlying idea of IAVE’s Global Corporate Volunteer Council and its members, global companies seeking the opportunity to sit at the same table for mutual learning and support.

If our research convinced us of nothing else, it convinced us that the process of global learning must be accelerated and sustained for the benefit of the field and, ultimately, for the benefit of – yes, we will say it again – community, volunteers and company.

### Managing Across Cultures

Perhaps the most difficult aspect of our research was to gain an understanding of how companies manage their volunteer programs across the many different cultures in which global companies must work.

We had neither the intention nor the capacity to develop a catalogue of those cultural differences in relation to understandings, perceptions or practices of volunteering generally or of corporate volunteering specifically.

Indeed, such a cataloging would be, at best, a general guide to what companies might expect in a given country or region. The diversity of the world is such that even within countries, attitudes about and approaches to volunteering may differ widely.

Also, different companies have very different experiences in the same country. Some companies told us of their strong programs in China, India and Russia, for example, while other companies told us that it was impossible for them to get volunteering moving in those same three countries.

We did hear examples, of course, of the challenges that were encountered. One company told us of planning to use its standard volunteer promotional campaign in a country until it was pointed out that it included images of people eating with knives and forks when folks there do not use them. Another told us of sensitivities about their normal color scheme for their volunteer efforts and collateral materials because it conflicted with the country's national colors. In both cases, the companies made alterations and all was well.

For some companies, honestly, this did not seem to be an issue. Some assumed that theirs could be a "one size fits all" approach with necessary modifications undertaken by regional or national leadership. Others believed that their overall approach was so decentralized that within general guidelines, volunteering would naturally develop in ways appropriate to each culture.

There were companies who expressed concern about how they could learn about and manage cultural differences. There was particular interest in how they would handle it as they entered new, unfamiliar markets.

Out of our interviews and readings grew these nine guidelines for how this challenge might be handled.

1. **Be open to differences.** As Julia Gin at **Kraft Foods** told us, "We need to think differently, to think globally, not nationally." It seems simple but it is a lot easier to say than do.

All of us need to overcome our inherent biases and the limitations built into our view of the world. We heard and read many generalities about the way things were in various regions of the world, many of which seemed stereotypical. It is critical not to make value judgments about cultural differences. A great example is how men and women can be appropriately presented together in images.

There are very real differences around the world. It is important to learn to understand and accept such differences, not to judge them.

2. **Look for help inside the company.** Who knows about a particular region or country? Are there employees who are natives? Who has worked there? Who is responsible for managing business there? All will have insights into general cultural issues.
3. **Look for help outside the company.** A few minutes of online searching will give you more information on a country than you can likely absorb. But searching “volunteering in (country or region)” will help you develop some general knowledge and help you frame key questions or issues you need to explore.

Searching online also can turn up lists of global companies working in a country. Check out the ones most likely to have volunteer efforts underway and connect with them. Most will be happy to share what they know or put you in touch with a manager in that country. Look among your existing NGO partners to see if any have operations in the country of interest and turn to them for input.

4. **Look for help “in country.”** If you already have people on the ground, ask them to help identify local employees who can serve as your “in-house counsel” – they may even turn into your first local volunteer leaders. Ask for help as well in identifying leading local NGOs or resource organizations serving the business community. If feasible, consider organizing a focus group to give you insights and feedback on what likely will and won't work.
5. **Plan from the bottom-up.** Especially when entering a new market, take the time for planning to happen in-country rather than to be parachuted in from outside. It is one thing to be pro-active in sharing expectations, policies, frameworks and models. It is quite another when that morphs into a perceived mandate that certain activities not only *must* be done but that they must be done in a specified way.
6. **Check it out in advance.** Whatever the “it” is, if it relates to volunteering in a new or different culture, check it out with folks on the ground. Avoid the embarrassment, frustration and cost of changing things such as slogans that don't translate, images that aren't appropriate, text that does not communicate well or problematic colors after they are done. Don't miss the opportunity for advance review and reaction.
7. **Listen carefully to feedback.** Feedback comes in many forms. Some of it is through surveys and other formal feedback devices. Some of it is reflected in

levels of participation. Some comes from the stories that are told or not told. All is valuable. Be open, direct and appreciative in inviting not only feedback but in asking for help in analyzing and applying what the feedback means.

8. **Be flexible.** It is difficult to be rigid and also responsive to differences. You can insist on getting something done your way and then fighting through the resistance. Or, you can be open and flexible and adapt to the differences. Flexibility does not equate with diminishing expectations, but it does mean adjusting to fit reality.
9. **Keep track of what you are learning.** Begin to create institutional memory about your global experiences and what you are learning from them. Find ways to share those lessons with people in the company who need be aware of them. Share them, as you are comfortable doing so, with other companies as part of your contribution to building the field.

*Is it possible to be both good friends and friendly critics?*

## Where are the critics?

That “cottage industry” that we spoke of earlier is very real. Throughout the world, it is possible to find organizations and individuals outside companies that have made it their work to promote, study, and support corporate volunteering. Many of those organizations are ones that are recognized leadership organizations for volunteering generally.

Those organizations also may be candidates to be co-opted by the business community. Can they be advocates for corporate volunteering and providers of services to companies (often for membership or service fees), recipients of corporate sponsorships for conferences, research and publications – and also speak for the interests of the NGOs that are partners in corporate volunteering? Can they have corporate members on their boards of directors or advisory councils – and still stand at a distance and dispassionately assess and, if needed, critique what companies are or are not doing?

Is it even acceptable to express skepticism about aspects of corporate volunteering that may be troubling to them or to their NGO stakeholders?

Is it possible to be both good friends and friendly critics?

It is hard to bite the hand that feeds you.

For the field to advance, there must be critics as well as cheerleaders, skeptics as well as true believers. Not all of the news will be good news – but it must be reported as well so that all can be challenged, can reassess, can learn.

We will need companies that understand and accept this – and who are willing to support it financially and demand and defend independence, even when their hands are nipped in the process.

That has already happened in corporate support for independent voices in CSR, in philanthropy and in protection of the voluntary sector as a whole. Now it is needed in corporate volunteering.

# Chapter 17

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## A Dozen Things that Might Happen

What does the future hold?

Like the old American song says, “*Qué será, será. What will be, will be.*”

Be that as it may, let’s jump in and take a look at 12 possible, maybe even likely, developments that will characterize what we now call “corporate volunteering” over the next five to ten years.

### **Evolving Understanding – But the “Big Tent” Survives**

As noted in the previous chapter, there has always been debate about whether some aspects of corporate volunteering are “really” volunteering. Indeed, the dissertation research I did was on the “role of community service” in CEOs’ lives, not “the role of volunteering,” in large part because it was difficult to differentiate “true volunteering” from what they were doing essentially as a requirement of their job.

It also was true, though, that I could not have chosen then – or now, for that matter – a random group of CEOs and found that they were all involved in service. I was looking for CEOs committed to it. Like any group of people, some were and some weren’t. I chose those who were.

So, if participating in community service can be considered a job requirement, then only some CEOs choose to fulfill that role. In that sense, their actions were, at least in part, voluntary. Indeed, a couple of the CEOs I interviewed even suggested that they thought their boards of directors wondered how they managed to be so involved and still do the rest of their jobs.

I agree that there will be a continuing evolution in our understanding and in how we talk about what the Corporate Citizenship consultancy in London has labeled “employee community engagement.”

Personally, I imagine a continuum that stretches from “individual volunteering” to “company volunteering” with various forms of involvement arrayed across it.

Individual Volunteering-----Company Volunteering

For me, volunteering undertaken by an individual with no support from the company is at the farthest left end. At the farthest right, I would place “required participation” activities, for example those in which service components have been built into required professional development and team building activities.

Released-time policies would likely be right in the middle, with company support for volunteering on employees' own time to the left and pro bono assignments and secondments to the right.

Unlike Bea Bocalandro (2011), I do not believe that it is impossible or undesirable for all of these to co-exist, that "strategic employee engagement" and "volunteering" (pure, true, traditional – whatever modifier you like) are mutually exclusive. Indeed, I believe they have and they can and they will prosper together, and that the "big tent" of what we call corporate volunteering will survive.

I also believe that the terms "corporate volunteering" or "employee volunteering" will survive, whether purists or theorists or even certain practitioners approve of it or not.

Why? Because "volunteering," in most parts of the world, carries positive connotations. It feels right to people. It has a positive image. It is seen as a growing, positive force in societies across the globe. I simply doubt that many companies or many volunteers will "volunteer" to give up its use.

### **Expanded Engagement with Natural and Man-Made Disasters**

While it may not be true that there are more natural and man-made disasters in the world, thanks to the effects of 24/7 global communications, it feels as if it is. For global companies, there is also greater awareness because they now have people around the world who directly or indirectly are affected by those disasters. Many of them have specific competencies and resources that can be put into play in response. Most face expectations of their employees, not only in the affected country but throughout the company, that they will offer opportunities for them to help.

This is an area of engagement that is ripe for collaborative planning by companies at global, regional, national and even local levels. It is true that some companies, those with specific and immediately relevant competencies and resources, will develop signature partnerships with response and recovery NGOs and multilateral agencies.

Most, though, by necessity will make their best contributions when working together with others. Advance planning, preparation, participation in prevention activities, knowing who will do what – all of these are critical. Just as individual companies have their own contingency plans for emergencies, so might consortiums of companies located close together. Leadership for such a cooperative effort might rotate among companies. Some employees might be trained to directly support first response – as the American Red Cross "Ready When the Time Comes" program has done in the U.S. – while others will be involved in longer-term recovery activities.

For all, the challenge will be how they can sustain their commitment over time. What happens in a country like Haiti when the immediate urgency is replaced by the ongoing struggle to recover and the media turns our attention to the urgency of another crisis in another location? This is where cooperation has its greatest potential, when companies can overtly agree on how to share responsibility, not only for initial response but for sustained engagement.

### Consumer Engagement

As we cited in Chapter 6, Edelman (2010) presented results from their *Global Consumer Survey* that showed 71% of consumers believe that “brands and consumers could do more to support good causes by working together” and 63% “want brands to make it easier for them to make a positive difference.”

We believe it is highly likely that companies will begin to take these expectations seriously and that we will see a growing number of them offer their consumers the opportunity to join them in actual hands-on volunteer activities.

**SK** has taken a lead through its SUNNY and T-together programs, offering their current and their potential consumers the opportunity to volunteer through company-driven and self-created activities, as we described in Chapter 6.

**Hyundai’s** Happy Move Global Youth Volunteer Program, while not aimed at current consumers, certainly could be seen as connecting it with potential future customers. Started in 2008, it annually involves 1,000 Korean university students as volunteers with partnering NGOs in India, China, Brazil, Czech Republic, Slovakia and Turkey, countries where they have factories, and in Hungary and Thailand. An employee joins as team manager for every 20 volunteers. The company pays all of the program costs.

**Starbucks** encourages its partners (employees) to include customers as well as friends and family members in their volunteer activities. They have also done promotional campaigns urging customers to pledge hours of volunteering.

This trend is likely to continue as the “millennials” exert their power as consumers. Companies will recognize that not only millennials but a broad range of consumers welcome opportunities to get involved in their communities in new ways.

### Leadership for Causes

In Chapter 8, we outlined four conceptual models for corporate volunteering – business focused, social service, social development, and human development. If it was possible

to measure how efforts are now spread across the four, it seems likely, based on the evidence available to us, that the vast majority would be in social services, helping people by ameliorating immediate need. It is what appeals to many volunteers, it is responsive to community priorities, it is well understood and usually not controversial.

As companies increase their focus on specific problems or issues, however, there will be growing pressure on them to become more active in seeking to resolve the underlying conditions that have created the immediate need. It is why business leaders are concerned with educational reform as well as putting volunteers into schools. It is why skills-based volunteers work with both NGOs and public-sector agencies to change the way in which their work is done, to build their capacity. It is why corporate volunteers are involved in public awareness and education campaigns to prevent problems before they need to be treated.

Ultimately, that will lead some into the arena of public policy as they recognize that it is the actions or inactions of governments, their policies, their allocation and management of resources, even their corruption, that is complicit in causing or sustaining the problems that companies are combating through their volunteer efforts and their broader CSR policies and practices.

In many parts of the world, businesses either exert or have the potential to exert tremendous influence on all sectors of society. Most often, of course, that influence is directed on securing that which adds to their bottom line.

We are unlikely to see companies organizing their employees to grab signs and take to the streets in protest of government policy – at least not officially and certainly not wearing company-provided logo-heavy T-shirts.

But it is quite possible that the pressure of expectations from both inside (employees) and outside (NGO partners, consumers) will lead more and more companies to dig beneath the symptoms, understand the causes and begin to take action to bring fundamental and systemic change. This may well include seeking to influence public policy, just as companies now do on issues directly related to their business interests.

### **Greater Inclusivity**

There was a time, 25 to 30 years ago, when U.S. companies were creating specific volunteer programs for their retirees, but that is not so much the case today. Rather, as we learned in the research, it is increasingly common for retirees and other alumni, family and friends of active employees, even consumers to be invited into companies' volunteer efforts.

There also seem to be deliberate efforts by companies to include the breadth of their employees. In the U.S., for example, we heard a number of times about outreach to “affinity groups” within the company – employee groups based on gender, race, ethnicity, sexual orientation – to draw them into volunteering and/or to structure volunteer opportunities that align with their interests and priorities.

While, as we argued in Chapter 16, inclusivity in volunteering is a major challenge, there are hopeful signs. We believe that within the next 10 years, finding appropriate ways to make volunteering available to *all* employees, not only those in office settings or professional roles, will be standard practice; indeed, that it will be such a strong expectation within the workforce that it will be irresistible.

### Collaboration among Companies

Closely related to greater internal inclusivity is external collaboration among companies. As we wrote above, preparing for and responding to natural and man-made disasters offers an important opportunity for this. It can also happen as a matter of routine.

Europe is leading the way in developing models for collaborative corporate volunteering activities among companies – through ENGAGE in a dozen cities in Europe and a half dozen outside and in the national corporate volunteer councils in Turkey and Portugal.

ENGAGE, based at Business in the Community in London, has developed a unique model to bring together companies in targeted cities with strong NGO partners to develop collaborative volunteer activities. Each project is designed and funded locally and generally involves both local and global companies. It increases impact by leveraging different strengths and gives companies the opportunity to learn from one another and to draw in companies not previously involved.

Özel Sektör Gönüllüleri Derneği, the Corporate Volunteer Association formed in 2002 in Turkey, now includes 50+ local and global companies. They provide support to companies by developing their programs, building partnerships with NGOs and designing collaborative activities. Their ENGAGE project involves companies in educational programs for primary students about the effects of global warming and the importance of recycling. They also have developed a strong awards program, designed to help all companies improve performance through the annual application process that clearly states criteria that must be met to receive recognition.

GRACE in Portugal, established in 2000 to promote socially responsible corporate initiatives, includes 60+ local and global companies. They organize G.I.R.O., an annual day of service for companies, as “an impact intervention... to improve physical conditions.” Its

ENGAGE project matches volunteers with young people to provide personal support to develop employment skills.

In Latin America, NGOs are playing a leading role in bringing companies together to work on high priority issues.

- Fundacion El Cinco in Colombia involves volunteers from several companies to work together to help small farmers turn into rural entrepreneurs.
- The Pro Bono Foundation in Chile convenes lawyers from more than 30 companies to improve access to justice through corporate advice, legal assistance and legal representation provided to persons of limited resources, high risk sectors or groups.
- Accion RSE in Chile, part of ENGAGE, involves ten companies in a deprived neighborhood.
- Glasswing International in El Salvador, Fundacion Compromiso in Argentina and Fundacion Dividendo in Colombia are creating joint corporate volunteer efforts.

“Collaboration” is a funny word. One of its meanings, the one most commonly in use, is along the lines of “working together toward common goals” or variations on that theme.

Another is “to cooperate with the enemy.”

When I say this in workshops or speeches, there are usually knowing smiles and nods from the audience. Too often, for both NGOs and companies, collaboration only happens when it is forced from the outside – such as a funder requiring two NGOs to work together as a condition for funding.

Interestingly, managers of corporate volunteering profess that, in their field, there is much less a sense of competition, of “cooperating with the enemy.” Thus, they can comfortably work together in local and national “corporate volunteer councils” and sponsor joint days of service. They can serve on the same NGO boards together. They can co-sponsor research and demonstration projects – our research project, for example – with shared learning and credit.

I still remember when, perhaps 25 years ago, **Exxon** and **Shell USA**, both headquartered in Houston, Texas, gave joint leadership to a high-visibility effort that dramatically increased the number of companies with volunteer efforts and strengthened the capacity of the local volunteer center to support that growing network and the capacity of NGOs to effectively partner with them. Their shared commitment to the community and to volunteering moved them past their natural rivalry into effective cooperative action toward a common goal.

In the future, we will see companies more pro-actively seeking to involve their supply chain, their business customers and their strategic business partners – first in their existing volunteer efforts but ultimately in jointly planned and jointly owned efforts. Local and national “corporate volunteer councils” will proliferate. More and more companies will enter into joint projects that will better engage their respective competencies, increase efficiency, reduce management costs and lead to greater impact. There also will be a growing number of companies that will do some portion of their volunteering, most likely skills-based, within the framework of programs like Bankers without Borders that will act as the conduits to effectively engage their people.

### Greater Decentralization within Companies

The overriding tension between globalization and localization will play out in corporate volunteering at least as much if not more than in other parts of business and society at large.

Thomas Friedman (2000) portrayed it as tension between the drive for prosperity and development and the desire to retain identity and traditions.

One of the corporate volunteer managers we interviewed put it more practically: “Local knows what local needs.”

Over and over we heard variations on that theme. Despite the growing inclination toward a limited focus on a few specific priorities, for example, discussion was almost always balanced with the need to provide ample flexibility so that regional, national and local managers could respond to “close to home priorities.” Indeed, some of the areas of “focus” were so broad that it would be possible to do almost any type of volunteering within them.

**UBS’s** implementation model, in which leadership for community affairs and volunteering is driven by regional teams, reflects their understanding that culture, expectations of community and employees, and opportunities for involvement differ from region to region and country to country.

**Tata Group** has created an overarching framework within which its 100+ companies develop their own unique approaches to volunteering and community engagement. They tie it together with an emphasis on mutual sharing of experience and learning.

We see emerging what may be the dominant model for global corporate volunteer efforts in the future:

- a consciously created and sustained environment that places high value on volunteering and creates an affirmative, non-coercive expectation of participation;
- a broad framework of policy;

- a centralized knowledge and resource structure (*à la* the **Tata** Council for Community Initiatives and **IBM's** On Demand Community);
- a range of global activities, some of which are required (days/weeks/months of service), some of which, like signature projects, that offer the option but not the requirement for participation;
- decentralized management, which is increasingly employee-driven (see below).

All of this will be tied together as a virtual community with investment in clear processes for reporting, sharing and mutual learning.

### More Employee Driven

This is a “back to the future” expectation. In the early days of the field, “community involvement teams,” or however they were named, were common components of corporate volunteer efforts.

In many cases, they had full responsibility for identifying needs in the community, setting priorities, planning specific activities, recruiting volunteers and implementing their plans. Their work was done on both company time and on personal time. Support from the company ranged from significant to minimal. Often the teams were the backbone of volunteering in the company.

As discussed in Chapter 16, individual and team volunteers continue to play major leadership roles for volunteering within companies. By leveraging the commitment and energy of these volunteers, companies dramatically multiply their capacity to create and sustain volunteering company-wide. They are especially important in companies that have no formal company-wide staffing structure available to support volunteering.

### Stronger NGO Partnerships

We have come a long way since the days when NGOs were the tolerated participants in corporate volunteering. Increasingly they at least are described as “partners.” While the reality of the relationship is often not quite a partnership, clearly NGOs are seen as having significant strategic and operational importance. Likewise, companies seem to be recognizing that they have a responsibility to build the capacity of their partners and to offset the costs that NGOs may incur through their partnerships.

This trend will continue. Partnerships will grow stronger. More and more companies will come to believe that they have as much to gain and learn from their NGO partners as they have to give and teach.

For this to happen, NGOs also must step up their performance. They must have confidence in what they have to offer, must become what we described as “volunteer friendly,” and must bear their share of the responsibility for making their partnerships mutually beneficial and sustainable.

### **More Effective Use of Technology**

A surprising learning in the study was that most companies are making only relatively routine use of technology to promote and support their volunteer efforts, even when they may be making extensive use of technology in their business operations, marketing and customer relations.

This appears to be largely the result of a lack of appropriate resources. Many companies, for example, indicated frustration with the limitations and poor responsiveness of their external software vendors, feeling that many have approached this work with “an NGO mentality,” not one attuned to corporate needs and realities. In some cases that has led companies to develop their own systems and portals in-house. However, doing so can be an expensive and time-intensive undertaking that requires strong executive support.

Accessibility issues are a significant problem for some companies. Line employees, for example, may have limited or no access to computers in the workplace. In some companies, there is a recognition that their online tools were designed to meet the company’s needs rather than to be useful to employees, thus discouraging use.

There are also real barriers to using social media within companies where employees are blocked from using those tools from company systems and/or during work hours.

At the same time, there is growing momentum among the participating companies to strengthen and expand the effective and innovative use of technology to support their volunteer efforts – by making it easier for employees to volunteer, by providing tools that can increase the impact of that volunteering, and by using technology as a vehicle to carry out volunteering.

There are excellent examples of companies developing new online tools to support their employees’ volunteering – primarily through portals, some multi-lingual, that include resource materials and some degree of social media for employees to exchange experiences and ideas.

These examples will multiply in the next five years as more and more companies conquer the practical and policy-based barriers to effectively using technology to support their volunteering.

## Global Learning

It is not happening now, but it will. It is inevitable.

There are significant barriers to overcome, not the least of which is that of language. Consideration must be given to how to collect, vet and organize information so it can become useful knowledge and not a random collection of data. Differences in cultural perspectives on corporate social responsibility and on volunteering need to be factored in. There must be a concerted effort to sustain a global perspective, one that reports but does not judge, one that sustains the “big tent” view of corporate volunteering.

Of greatest importance is overcoming personal and organizational barriers to learning from others, particularly those who come from different cultures and different realities.

All that is needed is leadership and investment – and a willingness to transcend both national borders and organizational silos. That is why it is a perfect initiative for IAVE's Global Corporate Volunteer Council, global companies from throughout the world that give it a uniquely global perspective for its work.

## Leadership for Volunteering

Included in the Keys to Excellence that we presented in Chapter 8, was this one:

Leadership companies go beyond themselves to provide leadership for volunteering at the local, national and even international levels, enrolling their stakeholders and bringing more and more companies into active engagement with their communities.

There have always been companies willing, even eager, to take on the kind of visible, energized leadership role that this statement envisions. They have worked within the field to draw new companies in, to create corporate volunteer councils, to build national networks. It was individual companies that were the stimulus for the creation of IAVE's Global Corporate Volunteer Council and that lead its work now.

Many of those same companies have worked outside the corporate world as well, providing leadership for the growth of the broader “volunteer community,” the amalgam of everything from sophisticated international NGOs to the most grass-roots efforts to mobilize people to respond to human, social and environmental problems and to build healthy, safe and sustainable communities.

“Corporate volunteering,” as a broad movement over the last four decades, has become a central force in that global volunteer community, bringing leadership, resources and visibility.

The challenge is to continue to broaden that commitment to lead, to draw new companies in while sustaining those that are long-termers. Too often, company commitment to this broader role is dependent on the leadership of a single person. “What will [company] do when X retires?” is not an infrequent concern. Sustained efforts need to be made from inside and outside companies to build the institutional commitment to leadership for volunteering.

Priority must be given to convincing companies in emerging markets to assume this same leadership role in their countries. In most cases, their impact will be even more pronounced because the broader infrastructure to promote and support volunteering is not well developed or is largely non-existent.

It is in the long-term best interests of companies to have strong, vibrant volunteering as a characteristic of the countries and communities in which they do business. Strong volunteering leads to healthier communities, ones in which it is better to do business and for employees to live and work.

This message needs to be taken to companies throughout the world. Their commitment to volunteering cannot, must not, be limited to their own system. They are needed as leaders for volunteering more broadly, helping to drive innovation and build excellence throughout our global volunteer community.

# Chapter 18

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## A Final Thought

As I was concluding this book, I repeatedly asked myself whether there was a single idea that I wanted to pull out for extra attention to ensure that when readers create their own moments, they will enter into dialogue, either with themselves or with others, about it. In the end, it became clear to me that it is this.

The future of “corporate volunteering” does *not* lay with a re-conceptualization that separates a concept of “true volunteering” from that of “strategic volunteering.”

Rather, the re-conceptualization needs to be of the current use of the label “strategic.”

“Strategic” is defined as “pertaining to, characterized by, or of the nature of strategy.” In turn, “strategy” is defined as “a plan of action or policy designed to achieve a major or overall aim.”

If our overall aim is to engage as many employees as possible in a high-visibility activity on a single day, then a global day of service is every bit as “strategic” as skills-based or cross-border volunteering, the current exemplars of “strategic corporate volunteering.”

If our overall aim is to ensure that every employee has the opportunity to engage in some form of service to the community, then a “big tent” approach, a comprehensive program of many alternate ways to participate, is “strategic.”

If our overall aim is to leverage the highly refined professional and technical skills of our employees to have a very focused impact on a specific issue, then skills-based volunteering and perhaps secondments are appropriate “strategic” solutions.

As too often used today, “strategic corporate volunteering” creates a sense of superiority, of separateness that, if not controlled, can denigrate other equally valid “strategic” solutions that fit a company’s goals.

The “big tent” has emerged for a reason – because diversity of opportunity for volunteering and community service best meets the diversity of realities, expectations, goals and needs of the global business community.

Let the circus continue...!

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# Appendix **A**

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## **A Test of NGO Readiness for Corporate Partnerships**

## THE BIG TENT. Corporate Volunteering in the Global Age

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This exercise is designed to build your awareness of how your organization will respond to various expectations of companies for the NGOs with which they are in partnership. There is no “scoring” – only greater understanding.

For each item please respond with the statement that you believe best describes your organization’s current reality.

|   | Generally Not True for Us | Mostly True but Could Be Stronger | Completely True for Us |
|---|---------------------------|-----------------------------------|------------------------|
| 1. Our primary motivation for seeking to involve corporate volunteers is because we believe they have the particular knowledge, skills and commitment we need to achieve our mission. |                           |                                   |                        |
| 2. We understand that receiving financial support for our organizations is not a guaranteed outcome of entering into a volunteer-based partnership with a company.                    |                           |                                   |                        |
| 3. As a matter of policy and practice, we seek to develop long-term partnerships with companies that extend beyond the volunteer involvement of their employees.                      |                           |                                   |                        |
| 4. We have clearly stated expectations of what we hope to achieve or receive through our relationships with corporations.   |                           |                                   |                        |
| 5. We have clearly stated what we are prepared to offer to companies in return for their support.   |                           |                                   |                        |
| 6. We are prepared to invest in an ongoing dialogue with companies about how we can best work together.   |                           |                                   |                        |
| 7. We do or would welcome the personal participation of the company’s top leaders as volunteers in our activities within parameters set by the company rather than by us.             |                           |                                   |                        |
| 8. We do or would welcome the personal participation of the company’s senior managers on our board of directors and/or advisory committees.   |                           |                                   |                        |

|   | Generally Not<br>True for Us | Mostly True<br>but Could<br>Be Stronger | Completely<br>True for Us |
|---|------------------------------|---|---------------------------|
| 9. We are happy for top leaders of the company to call attention to the work of their employees as volunteers in our organization in speeches, written reports or interviews.   |                              |   |                           |
| 10. We give particular attention and visibility to our corporate volunteers and/or corporate partnerships in our annual report and/or on our website.   |                              |   |                           |
| 11. We are aware of the support that the companies with which we work (or seek to work) offer to encourage and support employee volunteering (released time, flexible scheduling, financial or in-kind contributions to organizations in which they volunteer, etc.). |                              |   |                           |
| 12. We are aware of the policies and procedures through which the companies with which we work (or seek to work) determine when and how to provide funds to support specific volunteer projects undertaken by their employees.  |                              |   |                           |
| 13. At least one person on our staff has, as part of his or her job description, the responsibility for managing our relationships with companies.  |                              |   |                           |
| 14. Our leadership volunteers and our staff are trained in techniques to develop and manage effective partnerships with companies.  |                              |   |                           |
| 15. We are or would be happy to work with a team of corporate volunteers in planning, implementing and evaluating volunteer activities for employees from their company.  |                              |   |                           |
| 16. We do or would welcome everyone in the company's workforce as volunteers.   |                              |   |                           |

|  | Generally Not True for Us | Mostly True but Could Be Stronger | Completely True for Us |
|--|---------------------------|-----------------------------------|------------------------|
| 17. We do or would welcome and actively seek to involve families of corporate employees, retirees from companies and their families as volunteers.   |                           |                                   |                        |
| 18. We have a broad range of skill-specific volunteer opportunities available.   |                           |                                   |                        |
| 19. We have results-based descriptions of the work volunteers will do.   |                           |                                   |                        |
| 20. We are prepared to provide short-notice, short-term group volunteer opportunities.   |                           |                                   |                        |
| 21. We are prepared to provide information on our volunteer opportunities in a fashion that would make it easy for a company to communicate them to employees through the company internet or intranet, newsletters, email, public announcements and other ways that saturate the company. |                           |                                   |                        |
| 22. We are prepared to offer volunteers opportunities to develop and practice their project management skills.   |                           |                                   |                        |
| 23. We are prepared to provide group volunteer opportunities that can be used for leadership development or team-building purposes.  |                           |                                   |                        |
| 24. We are prepared to help volunteers relate their learning needs to specific volunteer jobs that will respond to those needs.  |                           |                                   |                        |
| 25. We have the skills and staff time available to help design and facilitate leadership development or team-building exercises built around group volunteer opportunities.  |                           |                                   |                        |
| 26. We are prepared to provide to companies information on the knowledge and skills that their employees have learned as volunteers in our organization.   |                           |                                   |                        |

|  | Generally Not True for Us | Mostly True but Could Be Stronger | Completely True for Us |
|--|---------------------------|-----------------------------------|------------------------|
| 27. We do or would work with companies to extend the opportunity for employee volunteering to their subsidiaries, joint venture partners, vendors and customers.   |                           |                                   |                        |
| 28. We regularly sit down with the companies with which we work to get feedback on the experience their employee volunteers are having in our organization, to address problems and to seek new opportunities to expand our work together.   |                           |                                   |                        |
| <p>SCORING – The items above are drawn from expectations that companies often have about their NGO partners. It does not disqualify you from partnership if you are uncomfortable with some of them. But it does suggest that you need to be transparent with companies about what you are and are not prepared to do.</p> |                           |                                   |                        |



# Appendix **B**

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## **The Performance Indicators for Corporate Volunteering**

This is a special version of the Performance Indicators for Corporate Volunteering, adapted for this book.

There are two good ways to use the Indicators in this form.

- Complete them on your own, reflecting on your perceptions of your company's volunteer efforts.
- Invite the immediate team responsible for your volunteer efforts to complete them with you, potentially including the person to whom you report. As a group, compare your responses and discuss the implications for your action.

In both cases, remember that in your analysis you must weight the value of each measure to your company's reality. It may be that a particular measure may not be held in high value by the company. For example, if the company does not imagine itself as a public leader for volunteering, low performance on the measures for Indicator #9 may be acceptable.

For some companies, improving performance on a particular measure may simply not be possible – or, at least, not be perceived to be worth the effort that might be required to get it done.

Please feel free to copy these pages so that you can complete them without marking up the book or for internal use with the immediate team responsible for your volunteer efforts. Please note that they are copyrighted by the Civil Society Consulting Group, LLC.

## The Ratings

For each measure, rate the extent to which it is true for your company.

0 = Generally not true for us

1 = Mostly true, could be stronger

2 = Completely true for us

Then total the score for that indicator. The maximum score for each indicator is 6.

## The Indicators and the Measures

### Indicator #1. Leadership Commitment and a Positive Organizational Environment

**Leaders at all levels create a positive environment that places high value on and encourages employee volunteering in the community.**

#### The Measures

\_\_\_\_ 1.1. Top leaders of the company personally and visibly endorse employee volunteer activities, participate themselves, and encourage employees to participate.

\_\_\_\_ 1.2. Top leaders call attention within the company and publicly to employee volunteer activities through speeches, written reports, interviews or participation in recognition activities.

\_\_\_\_ 1.3. Those accountable for the volunteer program are directly involved in strategic development of the company's corporate social responsibility policies and programs.

Total Score: \_\_\_\_

### Indicator #2. Policy Framework that Enables High Performance

**There are written policies, which are well publicized to employees, that clearly articulate the company's commitment to employee volunteering and recognize its contribution to achieving strategic business goals and its benefit to the workers who participate and to the community.**

#### The Measures

\_\_\_\_ 2.1. There is a written policy statement on corporate social responsibility, widely disseminated in human resource policy manuals, websites, intranet or similar sources, that clearly identifies the strategic value of employee volunteering to the community, its employees, and the company.

\_\_\_\_ 2.2. Formal policies and procedures motivate and facilitate volunteering by employees.

\_\_\_\_ 2.3. Employees are actively encouraged to take advantage of support that the company offers for employee volunteering, such as released time, flexible scheduling, financial contributions to organizations in which they volunteer, etc.

Total Score: \_\_\_\_

### Indicator #3. Diversity and Inclusive Opportunities

**All employees in all parts of the company are encouraged and enabled to engage in the community, both through structured programs and spontaneous activities initiated by employees.**

#### The Measures

\_\_\_\_ 3.1. Company-sponsored volunteer activities are available to everyone in the workforce.

\_\_\_\_ 3.2. Employees who volunteer reflect the diversity of the company's workforce - age, gender, race, employment level, seniority, etc.

\_\_\_\_ 3.3. The company supports employee volunteering through internal publicity, recognition, financial support, etc. Opportunities to volunteer are communicated to employees through the company internet or intranet, newsletters, email, public announcements, and other ways that saturate the company.

Total Score: \_\_\_\_

### Indicator #4. Managing for Impact, Sustainability and Innovation

**Management of the company's volunteer activities meet the same performance standards as all other aspects of the company's work, with goals, action plans, timetables, monitoring, and reporting.**

#### The Measures

\_\_\_\_ 4.1. Employee volunteering is managed with the same level of discipline and excellence as core business activities.

\_\_\_\_ 4.2. A solid plan is in place to guide employee volunteering, defining goals, implementation strategies and priority activities, action plans, timetables, and processes for reporting and monitoring.

\_\_\_\_ 4.3. Employees who volunteer also have the opportunity to participate in setting priorities, goals and actions for the company's volunteer efforts.

Total Score: \_\_\_\_

## Indicator #5. Support and Resources

**The company allocates appropriate human and material resources to ensure the success of its employee volunteer activities.**

### The Measures

\_\_\_\_ 5.1. The company supports employee volunteering by providing in-kind resources (space, telephones, equipment, supplies, etc.).

\_\_\_\_ 5.2. There is an annually approved budget for employee volunteer activities that remains at least constant from year to year.

\_\_\_\_ 5.3. At least one person has, as part of his or her job description, the responsibility for managing employee volunteer activities.

Total Score: \_\_\_\_

## Indicator #6. Strong Partnerships with the Community

**Strong, mutually beneficial partnerships are developed with the community to ensure that employee volunteering responds in ways that maximize benefit to and build the capacity of the community and its NGOs.**

\_\_\_\_ 6.1. One of the stated goals for employee volunteering activities is to respond to priority needs as identified by the community itself.

\_\_\_\_ 6.2. As a matter of policy and practice, the volunteer program seeks to develop long-term partnerships with organizations in the community as its primary vehicle for employee engagement.

\_\_\_\_ 6.3. The company provides training and/or consulting or other resources to organizations in the community to ensure that they have the capacity to effectively engage employee volunteers.

Total Score: \_\_\_\_

### **Indicator #7. Learning from Action**

**There are established processes to ensure that volunteering directly contributes to the personal and professional development of employees and to organizational learning.**

\_\_\_\_ 7.1. The company actively encourages workers to use engagement in the community as a way to build knowledge and skills and provides tools to help them do so effectively.

\_\_\_\_ 7.2. The company documents (or asks the community organizations in which employees are engaged to document) the knowledge and skills that employees learn and practice through their engagement in the community.

\_\_\_\_ 7.3. The company routinely seeks to learn from employees who are engaged in the community about community conditions, public perceptions of the company, and opportunities for new actions by the company and shares that learning inside the company with those who may be able to make use of this knowledge.

Total Score: \_\_\_\_

### **Indicator #8. Evaluation**

**There are established processes for regularly measuring and assessing the quality of volunteers' experience, the results of their work, and the impact of that work in the community and for the company.**

#### **The Measures**

\_\_\_\_ 8.1. Data is collected about the nature and scope of employee volunteering – number of people involved, number of hours of engagement, type of work done, number of organizations and/or people served, economic value of the service, etc.

\_\_\_\_ 8.2. Employees are regularly asked for feedback on the quality of the processes, both within the company and in the community organizations for which they work, through which they are involved as volunteers; their input is used for “continuous improvement” of those processes.

\_\_\_\_ 8.3. The company has established ways to determine whether and how employee volunteer activities are contributing to the achievement of strategic business goals, such as in human resource development, community relations, etc.

Total Score: \_\_\_\_

## Indicator #9. Leadership for Business and Community

**The company gives active, visible leadership in promoting volunteering, not only to other companies but to the community as a whole.**

### The Measures

\_\_\_\_ 9.1. The company promotes the concept and benefits of employee volunteering to other businesses in its industry group and in the communities in which it does business and offers its expertise to help them get involved effectively.

\_\_\_\_ 9.2. The company supports – with volunteer leadership and other resources – the development of organizations that have as their primary mission the promotion and support of volunteering (i.e., “volunteer centers,” “corporate volunteer councils”).

\_\_\_\_ 9.3. The company helps stimulate and/or participates in regular meetings with other businesses to share best practices and resources in employee volunteering and to build a strong case supporting corporate volunteering.

Total Score: \_\_\_\_

Now, add up the total scores of all of the indicators and enter it here:

Grand Total of the Scores for the Indicators: \_\_\_\_  
(maximum possible is 54)



# Appendix C

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## **The Companies in the Global Corporate Volunteering Research Project**

In deep appreciation of each of these companies that committed the time and attention to enable us to learn from their experience and to share that learning with the field.

|                       |                               |                           |
|-----------------------|-------------------------------|---------------------------|
| Alcoa                 | GSK                           | Salesforce.com            |
| American Airlines     | HSBC                          | Samsung                   |
| AXA                   | Hyundai Motor Group           | SAP                       |
| BD                    | IBM                           | SK Telecom                |
| BHP Billiton          | KPMG                          | SOMPO Insurance           |
| C&A                   | Kraft Foods                   | Standard Chartered Bank   |
| Camargo Corrêa        | Linklaters                    | Starbucks                 |
| CEMEX                 | Manulife Financial            | State Street Corporation  |
| Citi                  | Marriott Hotels International | Tata Group                |
| The Coca-Cola Company | Microsoft                     | Telefónica                |
| Dow Chemical Company  | Monsanto                      | Timberland                |
| Eli Lilly and Company | Motorola Mobility             | UBS                       |
| FedEx                 | National Australia Bank       | United Business Media LLC |
| Ford Motor Company    | Nike                          | UPS                       |
| Fujitsu               | Pfizer Inc.                   | Vale                      |
| GE                    | Rolls-Royce                   | The Walt Disney Company   |

With special thanks to the sponsors of the project.

|                   |             |                       |
|-------------------|-------------|-----------------------|
| UPS               | Pfizer      | Eli Lilly and Company |
| C&A               | SK Telecom  | Telefónica            |
| GE                | BD          | State Street          |
| Motorola Mobility | Kraft Foods | American Airlines     |



