

Mapping Success in Employee Volunteering

The Drivers of Effectiveness for Employee Volunteering and
Giving Programs and Fortune 500 Performance



BOSTON COLLEGE
CARROLL SCHOOL OF MANAGEMENT

Center for Corporate Citizenship

To help community involvement professionals steer their volunteer programs toward high community and company impact, this report presents an absolute and a relative benchmark of effectiveness for employee volunteering.

The absolute benchmark consists of the Drivers of Effectiveness for Employee Volunteering and Giving Programs composed of the six practices or drivers that, according to existing research, generate community and company impact.

The relative benchmark consists of findings from a survey of over 200 Fortune 500 companies that measured collective compliance with the drivers and identified best practices from high performers.

On the cover: Lockheed Martin's "Engineers in the Classroom" program aims to inspire students to think of careers in engineering as compelling, rewarding and even fun.

By Bea Boccalandro

Faculty Member

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Corporate Citizenship

This project sponsored by



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Employees strengthen corporate citizenship from the inside out with compassion, promising ideas and unparalleled energy.

Message from the Managing Director

Business today faces an escalating demand and growing need to play a greater role in addressing society's problems. Employees will be the key to any company's efforts. This survey and report on effective community involvement through employee volunteering and giving programs could not be timelier. The data collected from more than 200 Fortune 500 companies are the richest and most informative I've seen in recent years.

Until now, practitioners and academics alike have often relegated employee volunteering and giving to the margins of corporate citizenship. This is a missed opportunity. Brought into the core, employees strengthen corporate citizenship from the inside out with compassion, promising ideas and unparalleled energy.

Community involvement professionals from around the globe will find great value in the knowledge and guidance presented in this report, sponsored by Bank of America. I believe it contains long-sought guidance on how to tap the full potential of employee volunteering to strengthen corporate citizenship. It reinforces the need to align community involvement, like other aspects of corporate citizenship, with the business strategy. And it stresses the value of evaluating and measuring the impact of programs on the community and the business.

I am excited about the opportunities this report opens up for companies seeking to evolve their community involvement. As companies study, apply and even critique the guidance of this report, they will strengthen their corporate citizenship, elevate their businesses and brighten their communities.



Cheryl Yaffe Kiser
Managing Director
Boston College Center for Corporate Citizenship

This project scrutinized the research and the Fortune 500 practices related to employee volunteering to lay the path, or at least a set of landmarks, leading to high impact employee volunteering.

Executive summary

As the trailblazers of an emergent field, community involvement professionals have long managed their Employee Volunteering and Giving Programs (EVGPs) without benefit of an established path to success. Fortunately, the body of knowledge relating to employee volunteering is finally robust enough to begin identifying the EVGP components that lead to meaningful and substantive impact in the community and the company. This project scrutinized the research and the Fortune 500 practices related to employee volunteering to lay the path, or at least a set of landmarks, leading to high impact employee volunteering.

The report presents an absolute and a relative benchmark of effectiveness for employee volunteering. The absolute benchmark consists of the Drivers of Effectiveness for EVGPs composed of the six practices or drivers that, according to existing research, generate community and company impact:

1. Cause-effective Configuration
2. Strategic Business Positioning
3. Sufficient Investment
4. Culture of Engagement
5. Strong Participation
6. Actionable Evaluation

The relative benchmark consists of a survey of over 200 Fortune 500 companies that measured collective compliance with the drivers and identified best practices from high performers.

Employee volunteering has succeeded in establishing a foothold in corporate America.

More than nine in 10 Fortune 500 survey respondents have formal EVGPs. Having made it to the mainstream, however, employee volunteering is now challenged to make an impact. The vast majority of Fortune 500 respondents have EVGPs that are not ideally structured for high impact on society or the company. Fortune 500 respondents have an average compliance with the drivers of 26 percent and more than half have compliance scores of less than 30 percent. Common EVGP weaknesses include failure to draw from the full suite of corporate assets, insufficient resources, isolation from relevant business functions, low employee participation and inadequate evaluation systems.

This is not to say that EVGPs are not contributing to the wellbeing of employees, businesses and, most important, communities. Across every indicator of every driver, some companies are decisively and ingeniously demonstrating success. Nevertheless, the collective potential of employee volunteering transforming our social and corporate sectors remains largely untapped.

However, if company response to date is any indication, the promise of employee volunteering will be realized. No sooner had the drivers laid down a rough path to greater EVGP effectiveness, than community involvement professionals were on the march. Many enterprising companies are already illuminating the way forward.



On Marriott's Spirit to Serve Our Communities Day in Atlanta, Georgia, senior executives joined employees from 16 local hotels to sort food that provided over 8,000 meals (left to right: Bill Bolling, Founder and Executive Director of Atlanta Community Food Bank; J.W. "Bill" Marriott, Jr., Chairman and CEO of Marriott International, Inc.; and Ed Paradine, Vice President, Marriott Market Management, Central Region).

Introduction

Purpose

This report aims to help corporate community involvement professionals configure their Employee Volunteering and Giving Programs (EVGPs) to effectively impact their communities and companies. It presents an absolute and a relative benchmark of effectiveness for EVGPs. The absolute benchmark consists of the Drivers of Effectiveness for EVGPs, composed of the evidence-based six practices that lead to community and company impact. The relative benchmark, drawn from a survey of 203 Fortune 500 companies, enables readers to compare their EVGP scores on the drivers to average Fortune 500 respondent scores, and to learn how select companies meet the drivers.

Author and partners

This Boston College Center for Corporate Citizenship report was authored by Bea Bocalandro, a Center faculty member and president of VeraWorks, a firm dedicated to helping companies develop effective community involvement. Bank of America sponsored the project. Researchers, practitioners in leadership positions and other experts listed under “Project advisers” (page 39) helped develop and validate the drivers and provided feedback and advice throughout the project. Finally, more than 200 Fortune 500 company representatives participated in the survey and generously shared their practices.

Definition of the Drivers of Effectiveness for Employee Volunteering and Giving Programs (EVGPs)

The Drivers of Effectiveness for EVGPs are

evidence-based actionable and measurable assessment criteria on the degree to which an EVGP is structured to make a meaningful and substantive impact on the community and the business. “Meaningful and substantive” community impact denotes detectable progress relative to a charitable cause or public good. Examples include increasing the local high school graduation rate or improving the efficacy of preventive services offered by a health clinic in a developing country. “Meaningful and substantive” business impact refers to a detectable improvement in an item related to business success such as employee retention or product appeal.

Collectively, the drivers define a state of ideal EVGP effectiveness. That is, an EVGP that has 100 percent compliance with all six drivers is maximizing its impact on community and business to the best of existing knowledge.

Methodology behind the Drivers of Effectiveness for EVGPs Development

The Drivers of Effectiveness for EVGPs were constructed out of a thorough review of relevant research and other information from the Boston College Center for Corporate Citizenship and other organizations. The review identified EVGP practices across a variety of countries, industries and company sizes for which there is sound evidence of associated community or company impact. These were incorporated into the drivers. Practices for which the review found evidence of no positive effect on impact or inconclusive evidence were excluded from the drivers.

The drivers also have been validated as follows:

Expert review. More than a dozen experts in the field, listed under “Project advisers” (page 39) reviewed and provided feedback on the drivers.

Test of concurrent validity. The drivers were validated against the only existing formal measure of effectiveness related to EVGPs: awards programs wholly or partially based on employee volunteering. The programs included in this analysis were the Awards for Excellence in Workplace Volunteer Programs conferred by the Points of Light Institute and HandsOn Network, The Ron Brown Award for Corporate Leadership administered by The Conference Board, and the U.S. Chamber of Commerce Corporate Citizenship Awards (where relevant, only the community-focused award categories were included). This analysis upheld the validity of the drivers: Fortune 500 respondent companies that have been honored with awards since 2006 had an average compliance on the drivers of 40 percent, versus a 24 percent average compliance among companies that have not been honored with such awards.

Respondent feedback. Every page of the Drivers of Effectiveness for EVGPs Benchmarking Survey Tool (www.volunteerbenchmark.com) provided respondents the opportunity to critique the drivers, indicators and questions; including check boxes noting, “I disagree with this result. I believe that my program performs better on this driver than this instrument indicates.” Those who selected this box were asked to explain. Through these feedback features, the first 25 respondents identified several content validity issues, mostly on the interpretation of certain

words. Additional clarification on the survey questions appeared to remedy these issues. Later applications of the instrument generated no additional data concerns. However, respondents provided excellent observations on the content of the drivers, which are summarized in the presentation of each individual driver.

Scoring performance

Collectively, the six drivers measure the degree to which an EVGP is structured to effectively impact the community and the company. Each driver was crafted to carry close to the same level of importance in generating impact. For this reason, the drivers do not need to be weighted. Overall performance on the drivers is a simple average of performance across all six drivers.

Similarly, the measure of performance on one driver is a simple average of how many indicators were met. In other words, indicators within one driver are equally weighted. However, an indicator from one driver does not necessarily carry the same weight as an indicator from another driver, and survey questions that populate each indicator also have varying weights.

Limitations

Despite the care invested in developing and validating the Drivers of Effectiveness for EVGPs, they are not perfect predictors of EVGP effectiveness. There are three principal reasons for this:

1. **Scarce data on EVGP impact** While the drivers reflect the factors known to increase EVGP impact, many other causal factors have yet to be identified. Thus, the drivers are still an incomplete expression of every-

thing an EVGP could do to maximize its impact. As more and better EVGP impact data become available, future versions of the drivers will be more specific and refined. Nevertheless, Fortune 500 respondent feedback suggests that the current version is sufficiently robust and detailed to be helpful to most companies in increasing their impact.

- 2. Company uniqueness** The drivers are standard and companies are not. Thus, there are inherent limitations to the applicability of every indicator in the drivers to every company in every situation. Nevertheless, the drivers and their respective indicators originate from research conducted on a variety of company sizes, types and locations and are, therefore, expected to be widely applicable unless noted (in one instance, a driver was found to be inaccurate for smaller companies). Survey respondents were provided the option of reporting that indicators and drivers were inapplicable or otherwise flawed. Based on these data and feedback from project advisers, it is estimated that at least 95 percent of the drivers are applicable to 95 percent of companies 95 percent of the time.
- 3. Scope** The drivers assume that the EVGP benefits from standard companywide policies, procedures, practices and systems that support the basic functioning of any business unit. For example, the drivers assume that the company has quality hiring practices, performance review systems and administrative support for the EVGP. EVGP weaknesses caused by failures in these foundational items might not be revealed in an assessment against the drivers. Therefore, a review of the drivers should be coupled with a review of the EVGP's standard management and operations policies,

procedures, practices and systems.

Were the drivers perfect, scoring 100 percent compliance would guarantee a high-impact program. However, due to the limitations presented above, it is possible – although extremely unlikely – that an EVGP complies perfectly with the drivers and does not attain high impact. Similarly, it is theoretically possible but extremely unlikely that an EVGP that scores 10 percent compliance with the drivers will be high impact. The bottom line is that the drivers are valid, but not perfect, gauges of effectiveness.

Proper use

Given the limitations cited above, companies are advised to use the drivers to assess the effectiveness and guide the development of their EVGPs with the following caveats:

- 1. Not every indicator of every driver is expected to apply to every company at every point in time.** It is acceptable to disregard an indicator or driver if, after careful consideration, it is deemed inapplicable to the company at that point in time.
- 2. The drivers are guidance, not detailed instructions.** Because the drivers are only as specific as existing research findings allow, they may not provide guidance on EVGP details such as ideal length of events or design of post-event surveys.
- 3. The drivers reflect effectiveness only.** Effectiveness is not the only criterion in making business decisions. Users need to weigh the efficacy gains of performing well on each driver against other considerations such as disrupting tradition, straining internal relationships and other “real world” considerations.

4. The drivers are always evolving. As research continues, the drivers will continue to develop. If you consider a driver or one of its indicators irrelevant, outdated or misguided, communicate this to the Center for Corporate Citizenship. For all the work already conducted, it is acknowledged that the drivers are not perfect and will require revisions.

Methodology behind the Fortune 500 survey

Data collection and analysis

The research team contacted every Fortune 500 company via e-mail and/or phone to participate in a survey that measured its performance on the drivers. The survey items were piloted on 15 companies via phone interviews conducted from January to April 2008. The online version of the survey, the Drivers of Effectiveness for EVGPs Survey Benchmarking Tool (www.volunteerbenchmark.com), was launched in June 2008.¹ The tool not only collects data but provides users with customized benchmark reports against the drivers, and against Fortune 500 companies and other groups of respondents. This report includes data collected via the online Survey Benchmarking Tool and its interview equivalent between January 2008 and January 2009 from 203 Fortune 500 companies, representing a 41 percent response rate.

Every page of the online survey provided respondents the opportunity to report problems completing the survey and submit feedback

¹ The survey items are presented in the treatment of each driver. However, response options were excluded, and small adjustments were made in order to present the online questions accurately and concisely in a paper format. For the exact survey items, please visit www.volunteerbenchmark.com.

on the drivers or their performance report, which was immediately provided. Since invitations were personal e-mails or phone calls, respondents also could, and did, e-mail or call with concerns or comments. Feedback from these mechanisms was reviewed on a continual basis. Aside from language clarifications and a handful of Web-access challenges (which were addressed in every instance), no issues arose in the survey administration.

This report presents the data by indicator and driver. The data were reviewed for self-selection bias and, because respondents with no formal EVGPs were overrepresented, responses were weighted. Any differences presented in this report proved statistically significant at the 95 percent confidence level (using the Student's t-test or the Pearson's chi-square test, as appropriate).

Selected companies performing well on each driver were asked to provide more information on their pertinent practices to help populate the "Key findings and successful practices" sections. The presented practices are not representative of survey respondents. Instead, they were selected for their perceived value to other programs and likelihood to help the field progress. Listed companies are not necessarily the top performers on the pertinent driver nor are they the only high performers. To avoid conflicts of interest, project advisers employed at Fortune 500 companies did not play any role in selecting or influencing company practices presented in this report. Furthermore, in order to ensure research findings were strictly independent from the influence of sponsorship, Bank of America practices were excluded from any mention. All other Fortune 500 company best practices, however, were considered.

Limitations to the Fortune 500 survey

As with any research, the Fortune 500 survey has some constraints. Although a 41 percent response rate is higher than customary, there is no guarantee that respondents are representative of all Fortune 500 companies. Furthermore, figures presented in this report have a margin of error of up to 10 percent (due to sampling error).

Survey respondents

The 203 survey respondents from the 2008 Fortune 500 list, per the list from Fortune magazine, have the characteristics described below.

Represent a diversity of industries:

- 13 percent technology
- 12 percent utilities
- 11 percent financial services

- 8 percent health care
- 7 percent industrial goods and services
- 7 percent retail
- 6 percent food and beverage
- 5 percent insurance
- 5 percent oil and gas
- 5 percent travel and leisure
- 4 percent telecommunications
- 3 percent banks
- 3 percent chemicals
- 3 percent construction and materials
- 8 percent other

Are overwhelmingly established:

98 percent are more than 10 years old.

Are mostly international:

65 percent operate in more than one country.

Have mostly large work forces:

The majority have more than 25,000 employees and the average is 64,000.

The nascent nature of strategic employee volunteering practically destines EVGPs to low performance on the drivers.

Drivers of Effectiveness for EVGPs and Fortune 500 performance

An overview of Fortune 500 performance

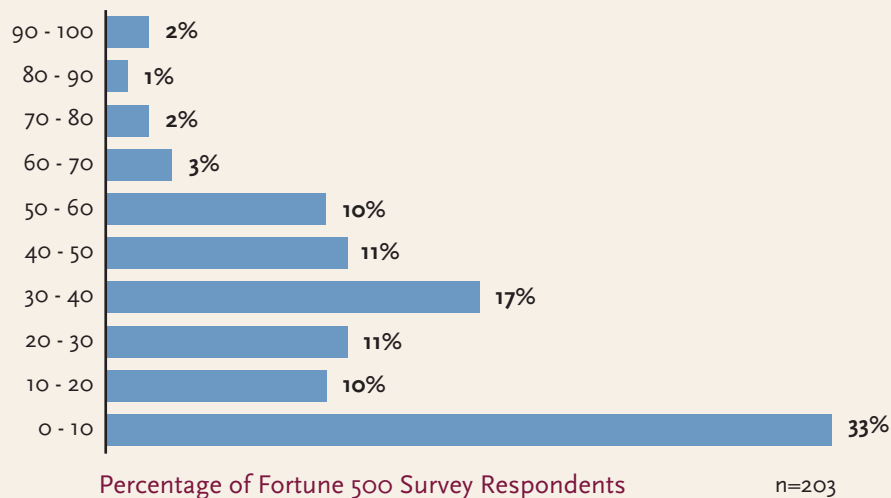
Employee Volunteering and Giving Programs (EVGPs) appear to be mainstream and mandatory for Fortune 500 companies. Ninety-two percent of Fortune 500 survey respondents have formal EVGPs in that they dedicate non-negligible resources to employee volunteering (having only an employee giving program does not constitute an EVGP). Furthermore, over 90 percent of those very few Fortune

500 survey respondents currently lacking an EVGP report that they aim to develop one, and none said it was out of the question.²

Despite this widespread acceptance of employee volunteering, the vast majority of Fortune 500 respondents have EVGPs that are not structured for high impact on society or the company. Fortune 500 respondents have an overall compliance with the Drivers

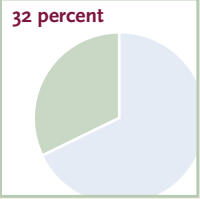
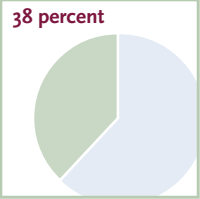
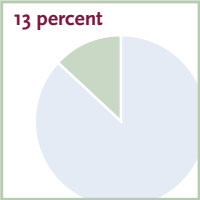
Distribution of Scores on the Drivers of Effectiveness for Employee Volunteering and Giving Programs

Score: Percentage Compliance on Drivers



² Because virtually no Fortune 500 respondents have “opted-out” of having an EVGP, data from those respondents that currently lacked EVGPs were included in the Fortune 500 performance statistics. If null data interfered with valid analysis of relationships between two items, these cases were excluded.

Drivers, indicators and performance³

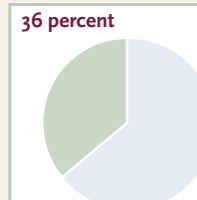
Driver	Indicators <i>(excluding survey questions that populate each)</i>	Percentage of Indicators Met by F500 Respondents <i>(average)</i>
<p>Driver 1 Cause-effective Configuration</p> <p>Highly effective EVGPs are structured to support social causes and nonprofit partners productively</p>	<ul style="list-style-type: none"> 1.1 Cause focus: Focuses on causes for which the company is especially well suited to support 1.2 Asset leveraging: Leverages the company's assets to support the EVGP 1.3 Philanthropic integration: Is integrated into the company's philanthropic program 1.4 Productive partnerships: Has procedures and systems to support effective partnerships with non-profit/government organizations served by the EVGP 	<p>32 percent</p> 
<p>Driver 2 Strategic Business Positioning</p> <p>Highly effective EVGPs are internally positioned to contribute toward business success</p>	<ul style="list-style-type: none"> 2.1 Business goals: Has employee-accessible written goals that explicitly state the business benefits the program promotes 2.2 Aligned infrastructure: Benefits from procedures/practices/guidance from department(s) charged with the business goals the EVGP program seeks to promote 2.3 Resonant cause(s): Focuses on cause(s) that connect to the business 2.4 Integration with corporate citizenship: Is integrated into the company's overall corporate citizenship/social responsibility plans 	<p>38 percent</p> 
<p>Driver 3 Sufficient Investment</p> <p>Highly effective EVGPs receive company resources commensurate with corporate efforts of similar scope <i>(This driver not applicable to companies with fewer than 3,000 employees)</i></p>	<ul style="list-style-type: none"> 3.1 Strong team: Has at least one full-time paid professional position for every 10,000 employees, and not less than two total, to manage the program (not organize events) 3.2 Adequate operating budget: Expend at least \$30 per employee in operations, and not less than \$500,000 total (operating budget excludes salaries and grants) 3.3 Grant support: Company grants to nonprofits in support of employee volunteering total at least \$100 per employee (e.g., dollars for doers, team grants, other grants tied to volunteer events, but not matching gift grants unless they are limited to organizations where employees volunteer) 	<p>13 percent</p> 

³ The order in which the drivers are presented has been updated since the launch of the Drivers of Effectiveness for EVGPs Survey Benchmarking Tool.

Driver 4
Culture of Engagement

Highly effective EVGPs benefit from companywide facilitation and encouragement of employee involvement in the community

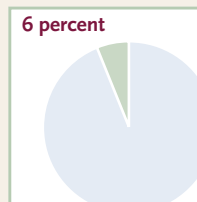
- 4.1 Facilitative procedures: Has universal procedures/practices/guidance to facilitate employee involvement
- 4.2 Formal encouragement: Has universal procedures/practices/guidance to create interest and enthusiasm for employee volunteering
- 4.3 Business department support: Business units supported by EVGP, per the EVGP's business goals, promote employee involvement
- 4.4 Middle management outreach: Educates middle managers on the relevance of the EVGP to their responsibilities
- 4.5 Senior management modeling: Has senior executive public participation
- 4.6 Accessible information: Makes information on how to get involved easily available



Driver 5
Strong Participation

Highly effective EVGPs have meaningful levels of involvement from the majority of employees

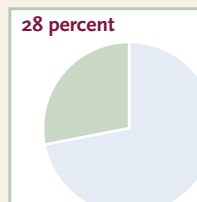
- 5.1 Majority participation: Involves at least 50 percent of employees in EVGP-supported volunteering
- 5.2 Substantial scale: Generates at least eight hours, on average, of volunteering per employee per year



Driver 6
Actionable Evaluation

Highly effective EVGPs track their efforts, hold themselves accountable to their outcome goals and implement evidence-based improvements

- 6.1 Participation metrics: Tracks employee participation in EVGP volunteering
- 6.2 Volume metrics: Tracks employee EVGP volunteer hours
- 6.3 Employee feedback: Collects employee feedback
- 6.4 Nonprofit feedback: Collects nonprofit partner feedback
- 6.5 Business outcomes metrics: Tracks business outcomes
- 6.6 Social-sector outcomes metrics: Tracks community outcomes



Overall performance: Fortune 500 respondents have, on average, 26 percent compliance with the drivers.

of Effectiveness for EVGPs of 26 percent. Eleven percent have a compliance of less than 5 percent; more than half have a compliance of less than 30 percent; and only 5 percent have a compliance of more than 70 percent.

That Fortune 500 EVGPs are relatively immature in terms of effectiveness is not surprising. First, EVGPs are a late-blooming component within the young field of corporate citizenship.ⁱ Second, until this project's development of the drivers, companies did not have a benchmark against which to assess their own effectiveness and an ideal to strive toward. Third, EVGPs historically have been more an employee perquisite than a strategic business function or a solution to social-sector issues. In other words, the nascent nature of strategic employee volunteering practically destines EVGPs to low performance on the drivers.

Following is the presentation of each driver, and of Fortune 500 survey respondent performance and successful practices.

Scoring the drivers

An overall score of 0 percent compliance across all drivers signifies that the company meets none of the indicators in any of the drivers; a score of 50 percent compliance means that the company meets, on average, half of the indicators on each driver; and a score of 100 percent compliance means that the company meets every indicator in every driver. Similarly, 0 percent compliance on one single driver signifies that the company does not meet any of the indicators that make up that driver, and 100 percent compliance signifies that it meets all the indicators.

Driver 1: Cause-effective Configuration

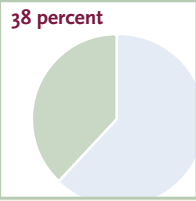
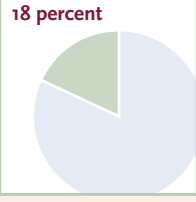
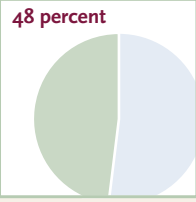
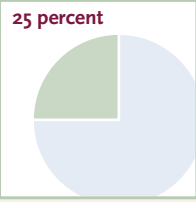
Highly effective EVGPs are structured to support social causes and nonprofit partners productively.

The central intent of an EVGP is to help underprivileged individuals, enhance communities, improve the environment or otherwise promote the public good by supporting the social sector, also called the nonprofit sector. As will be covered under Driver 2, Strategic Business Positioning, the other aim of an EVGP is to support the business. However, promoting public good is the EVGP's *raison d'être*. Without serving the social sector, an EVGP would not be an EVGP but simply a business initiative. In this regard, the public good is the primary interest of an EVGP.

This driver helps ensure that the EVGP is fundamentally structured to efficiently attain social-sector impact. A review of business management literature and of community involvement research from the Center for Corporate Citizenship, Deloitte, The Brookings Institution and others has identified several factors that help an EVGP attain public good objectives.^{ii, iii, iv, v} These factors, are codified in the indicators of this driver.

Survey respondents expressed one objection to this driver. A handful of individuals questioned the value of focusing the EVGP. They argued that limiting the cause(s) denies employees the option of supporting what they wish. These critics are correct that reducing employee choice can be a drawback of a focused EVGP. However, this complication does not refute the evidence from management theory and the field of community involvement asserting that narrowing the issue area to be impacted, and thus the capacities needed, is a hallmark of effectiveness.^{vi}

Cause-effective Configuration Driver: Indicators, survey questions and performance

Indicator	Survey Questions <i>(modified for on-paper presentation and excluding response categories)</i>	Percentage of F500 Respondents Meeting Indicator <i>(average)</i>
<p>1.1 Cause Focus</p> <p>Focuses on causes for which the company is especially well suited to support</p>	<p>To meet requires yes to both questions.</p> <p>1.1.1 Does the EVGP, or at least the volunteering program, focus on one or more causes?</p> <p>1.1.2 If so, does the company have special capacity to work on this/these cause(s)?</p>	<p>38 percent</p> 
<p>1.2 Asset Leveraging</p> <p>Leverages the company's assets to support the EVGP</p>	<p>To meet requires yes to both questions.</p> <p>1.2.1 Does the EVGP have written guidelines or institutionalized practices to provide employees turnkey ways to contribute their professional or technical skills to nonprofit partners (e.g., online kits)?</p> <p>1.2.2 Are there written guidelines or institutionalized practices that make available company products or other physical assets to support the charitable work of employee volunteering?</p>	<p>18 percent</p> 
<p>1.3 Philanthropic Integration</p> <p>Is integrated into the company's philanthropic program</p>	<p>To meet requires yes to both questions.</p> <p>1.3.1 Does the company have a grant program other than employee grant program?</p> <p>1.3.2 If so, are the EVGP, or at least the volunteering program, and the company grant program integrated?</p>	<p>48 percent</p> 
<p>1.4 Productive Partnerships</p> <p>Has procedures and systems to support effective partnerships with nonprofit/government organizations served by the EVGP</p>	<p>To meet requires yes to both questions.</p> <p>1.4.1 Does the company have written agreements with at least the key nonprofit partners that provide volunteer opportunities?</p> <p>1.4.2 Does the company support key nonprofit partners that provide volunteer opportunities in at least one other manner?</p>	<p>25 percent</p> 
<p>Overall performance: Fortune 500 respondents have, on average, 32 percent compliance with this driver.</p>		

Those who object to focusing the EVGP, however, have identified a genuine challenge: balancing the need to focus against employee wishes for employer support of their cherished charitable efforts. Fortunately, it is possible to have a focus area, which receives the careful attention and deeper treatment needed for effectiveness, and still support a wide variety of employee efforts (see “Focus through encouragement, not exclusion,” below).

Key findings and successful practices for Cause-effective Configuration

As is evident from the 32 percent compliance on the Cause-effective Configuration Driver, most Fortune 500 survey respondent EVGPs do not have an overall structure that maximizes community impact. Still, effective practices abound. For example, 34 percent of Fortune 500 respondent companies have formal board service or skills-based volunteer programs, and 12 percent draw on other noncash non-volunteer company assets, such as their commercial products or trucks, to strengthen EVGP services to the community. Following are details on selected effective practices.

Turn an employee issue into an EVGP

cause. Companies often develop expertise around a cause through efforts to address business issues, including care for their own employees. These capacities can serve as a logical focus for EVGP efforts. Exxon-Mobil, for example, developed world-class expertise in malaria prevention by confronting the impacts of this disease among its own employees and employees of its contractors. The company saw an opportunity to direct this capacity to worldwide malaria prevention. It has developed a multipronged effort that includes grants,

advocacy and EVGP activities. Volunteer activities of ExxonMobil and affiliate company employees range from fund-raising efforts in Europe to purchase mosquito nets, to distribution of these nets in Africa, and to participation of the company’s medical director of global issues and projects in a voyage on the fabled Zambezi River to provide medical treatment and raise awareness of the fight against malaria.

Develop a cause from a core competency.

At first blush, the fields of food processing and sustainable philanthropy may not seem to relate. Kraft Foods, however, found a powerful way to turn its core competency into a charitable cause. It helps meet food production needs in developing countries by teaching local organizations, companies and even government departments how to problem solve. For example, a team of three Kraft Foods corporate volunteers from Germany and Nicaragua helped IRAY, a small jam-making factory in Madagascar, develop a new line of products and packaging. Through 47 volunteer missions since 2001, Kraft Foods volunteer teams have helped build up the food industry in 28 countries, including Albania, Cape Verde, Ecuador, Honduras, Mozambique and Vietnam. Another company that leverages a core competency to offer a sophisticated public good is Symantec, a technology company dedicated to helping individuals and organizations secure and manage information. One of the focus areas of its EVGP is family online safety.

Leverage an internal organizational success.

Eli Lilly improved its own internal effectiveness using business management strategy Six Sigma and realized that it could help nonprofit organizations do the same. Lilly Six Sigma professionals collaborate

closely with a team from the benefitting organization to improve the effectiveness of that organization's service to the community.

Focus through encouragement, not exclusion. Guiding by means of emphasis, rather than restrictions, can generate the effectiveness gains of a cause focus without alienating employees whose charitable interests lie elsewhere. For example, Kraft Foods encourages and facilitates volunteering at hunger and healthy lifestyles organizations while also providing dollars-for-doers grants to organizations where employees volunteer, regardless of the cause.

Limit incentive programs to focus areas. On the other hand, release time for volunteering, dollars-for-doers grants (program in which company provides small grants to organizations where employees volunteer), awards and other incentives can be powerful methods for channeling employee volunteering to the EVGP's focus areas. UGI Utilities' release time for volunteering is for school-improvement activities exclusively. This helps ensure that the bulk of employee volunteering is high impact because it is carefully designed to achieve results by UGI in partnership with Reading is Fundamental. For UGI, having an exclusive cause focus has generated participation in the EVGP of more than one in five employees – this is higher than what the majority of Fortune 500 respondents have achieved across all causes.

Share office assets. Many nonprofits need office resources that companies can share without incurring high costs. Instituting practices that allow employees to share office space, parking lots, videoconferencing, phone banks and other office resources with nonprofit partners can augment the

impact of their volunteering. For example, Texas Instruments allows employees representing the company on a nonprofit board to use company meeting space in support of the agency.

Leverage nontraditional assets. The company assets most commonly leveraged by Fortune 500 respondent EVGPs are grants, products and employee skills. Southwest Airlines' EVGP, however, cleverly employs a nontraditional asset to benefit children: the role-model stature of its pilots. Adopt-A-Pilot is a formal turnkey curriculum that establishes a close relationship between a fifth-grade class and a pilot. The pilot helps children dream, set goals, and learn geography and science. Over several months, the class receives weekly visits from the "adopted" pilot and tracks his/her journey across the country via regular communications.



Southwest Airlines' signature program draws on its pilots' inspirational power to help fifth-grade children to stay in school and set career goals.

Serving business interests is central to an effective EVGP because, paradoxically, it facilitates the program's charitable impact.

Driver 2: Strategic Business Positioning

Highly effective EVGPs are internally positioned to contribute toward business success.

This driver helps ensure that the EVGP has the placement and stature within the company's plans and strategies to effectively add value to the business. Serving business interests is central to an effective EVGP because, paradoxically, it facilitates the program's charitable impact. Dedicating resources to an EVGP that does not generate a business return puts the company at a competitive disadvantage. Therefore, the only logical way a company can develop an EVGP of non-negligible scale is for the EVGP to improve corporate competitiveness.^{vii} Consistent with this argument, Fortune 500 company data from this survey suggest that Strategic Business Positioning makes it more likely that the EVGP will thrive. Respondents that meet two or more of the indicators of this Strategic Business Positioning Driver have EVGPs that are more than 30 percent larger than their less strategic counterparts in terms of both operating budget per employee and percentage of employees involved.

The importance of business return has been internalized within the field of community involvement. Most current definitions of effective corporate citizenship, corporate social responsibility, community involvement or other terms referring to the corporate pursuit of the public good include promoting business self-interest.^{viii} The Center for Corporate Citizenship's definition of corporate citizenship, for example, states that in addition to minimizing societal harm and maximizing societal benefits, corporate citizenship "supports strong financial results."^{ix} Michael

Porter, Harvard Business School's premier business strategist, coauthored an article with Mark Kramer espousing the win-win social-sector involvement for corporations.^x It's not just academics who consider it essential that corporate citizenship efforts, including EVGPs, benefit the business. A Conference Board study of multinational corporations found that it has become common to link the EVGP with the business bottom line.^{xi} Similarly, research commissioned by Pfizer and The Brookings Institution on international employee volunteering found it a best practice to "identify the business motivations of volunteering and then develop programs to fit those goals."^{xii} There is evidence that EVGPs make a measurable difference in business functions, including on:^{xiii, xiv, xv, xvi, xvii, xviii, xix}

- employee recruitment
- employee retention, morale or work-life balance
- employee skill development
- employee team building
- future workforce development
- public relations, branding and reputation
- sales

The most commonly pursued business benefits by Fortune 500 survey respondents are company reputation, employee team building and employee morale, each of which are pursued by more than a quarter of respondents.

While there is general consensus that business return has a proper place in any corporate citizenship program, there isn't universal consensus. Survey respondents made three arguments against positioning the EVGP as a business benefit, and thus against this driver. A discussion of each follows.

1. **“A focus on business benefits distorts the purely charitable nature of corporate philanthropy.”** It’s true that community involvement practiced today is not charity or philanthropy. It represents a twist on traditional forms of giving. Unless a business claims to be acting purely altruistically, however, there is no inherent problem with a win-win EVGP. Indeed, surveys show that the vast majority of consumers accept the need for business-smart community involvement.^{xx} Rather than seen as a “distortion” of corporate charity, today’s corporate involvement is widely accepted as a necessary adaptation of past giving.
2. **“Accruing business benefits through the EVGP threatens the tax-free status of corporate contributions.”** It is true that government tax policy might not treat an EVGP with Strategic Business Positioning as favorably as it treats pure philanthropy. It is also the case that tax implications are a valid consideration in designing any business endeavor, including an EVGP. However, in most cases, the business benefits that accrue from a strategic EVGP overshadow the negative tax consequences of linking the EVGP to business.
3. **“Employees and others dislike overt declarations of business goals.”** Two survey respondents shared that their companies preferred implied business goals rather than the explicit business goals this driver requires. As one noted, employees consider it “uncouth to talk of business as part of our giving.” It is true that corporate citizenship communications are notoriously tricky. However, the field of management has long established that failing to make clear and explicit the goals of any business endeavor undermines the success of that endeavor. Therefore, although developing

public business goals for the EVGP has its challenges, it is a move toward effectiveness.

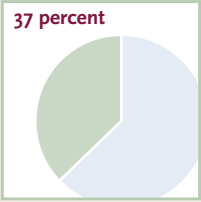
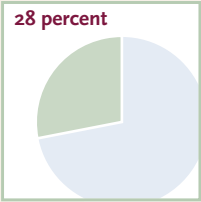
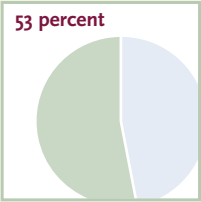
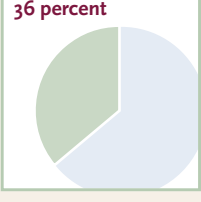
In other words, the objections to this driver are based on the difficulties of meeting it. While these difficulties are real they do not affect the driver which, by design, expresses only what maximizes EVGP effectiveness. It does not attempt to honor historical patterns, protect tax status or simplify the challenges of communicating corporate citizenship. Companies need to balance these considerations against the effectiveness gains of performing well on this driver. A company might decide, for example, that it prefers to conduct pure altruistic charity rather than maximize the effectiveness of the EVGP. As with every driver, all or portions of this one may not be appropriate to every company at every moment in time.

Key findings and successful practices for Strategic Business Positioning

While most EVGPs in the Fortune 500 survey can significantly improve their Strategic Business Positioning, this is one of their two highest performing drivers. More than a quarter of Fortune 500 respondent companies meet each of the indicators. Following are examples of practices from companies that perform well on all or parts of Strategic Business Positioning.

Select a social cause that naturally benefits the business. A company may benefit from progress in certain social causes by improving what business strategists call the “competitive context,” or making its environment more conducive to business success.^{xxi} That is, improving the cause facilitates business success. If this is the case, then simply supporting such a cause

Strategic Business Positioning Driver: Indicators, survey questions and performance

Indicator	Survey Questions <i>(modified for on-paper presentation and excluding response categories)</i>	Percentage of F500 Respondents Meeting Indicator <i>(average)</i>
<p>2.1 Business Goals</p> <p>Has employee-accessible written goals that explicitly state the business benefits the program promotes</p>	<p>To meet requires yes to all three questions.</p> <p>2.1.1 Does EVGP, or at least the volunteer program, have written goals?</p> <p>2.1.2 If so, can all employees access these goals (e.g., via intranet site, in written guidelines)?</p> <p>2.1.3 If so, do these goals specify business benefits?</p>	<p>37 percent</p> 
<p>2.2 Aligned Infrastructure</p> <p>Benefits from procedures/practices/guidance from department(s) charged with the business goals the EVGP program seeks to promote</p>	<p>To meet requires yes to the single question.</p> <p>2.2.1 Are the department(s) responsible for the business areas the EVGP aims to impact involved in the management of the EVGP?</p>	<p>28 percent</p> 
<p>2.3 Resonant Cause(s)</p> <p>Focuses on cause(s) that connect to the business</p>	<p>To meet requires yes to both questions.</p> <p>2.3.1 Does the EVGP (or at least the volunteering program) focus on one or more causes?</p> <p>2.3.2 If so, does/do focus cause(s) have an explicit business connection?</p>	<p>53 percent</p> 
<p>2.4 Integration with Corporate Citizenship</p> <p>Is integrated into the company's overall corporate citizenship/social responsibility plans</p>	<p>To meet requires yes to both questions.</p> <p>2.4.1 Does the company have a written corporate social responsibility plan?</p> <p>2.4.2 If so, is the EVGP (or at least the employee volunteering) included in the written corporate social responsibility plan?</p>	<p>36 percent</p> 
<p>Overall performance: Fortune 500 respondents have, on average, 38 percent compliance with this driver.</p>		



The Estée Lauder Companies' EVGP offers a suite of job readiness services for women, including mentoring, job preparedness training and makeovers.

makes the program strategic. For example, to help meet its future workforce needs Lockheed Martin launched a K-12 education initiative, Engineers in the Classroom. Its curricular, extracurricular, student engagement, and scholarship programs provide the academic rigor, real-world relevance, and lasting relationships that are needed to successfully develop future engineers. Other Fortune 500 EVGPs that improve company competitive context include Capital One, which focuses on financial literacy; and McKesson – a health care systems, medical supplies and pharmaceutical products company – which focuses on health care.

Craft a written business case. A clear and concise document outlining the business value of the EVGP can be very useful in helping internal stakeholders see the value of the EVGP to their work. Unum has successfully employed this tactic by creating a one-page business case for its EVGP that, among other uses, provides talking points in speaking to internal stakeholders about partnering.

Integrate into signature company initiatives. Rather than compete with signature company initiatives for attention, EVGPs are often best served by integrating and supporting existing high-profile initiatives. This not only provides a communications platform for the EVGP that it might not otherwise achieve, but it makes the EVGP more relevant to the business. Each May, Marriott celebrates its founding with global Associate Appreciation Week, designed to thank employees for their hard work throughout the year. One component of Associate Appreciation Week is Spirit To Serve Our Communities Day in which employees are encouraged to participate in an activity of their choice to help better their communities. Management arranges project logis-

tics and clears schedules to accommodate employees' volunteerism. This positions the EVGP's day of service squarely within a key company initiative.

Link to commercial product. One way to have the EVGP resonate with a company is to associate it with a product the company makes. One example is The Estée Lauder Companies (ELC). It works with several job readiness programs for women, offering a multitude of services through the EVGP. To complement the mentoring and job preparedness training that ELC employees provide, the company donates the time of makeup artists and its cosmetics products. Having a company product serve an important social cause can have the added advantage of reminding customers of the intrinsic value of the product. Customers are likely to have a greater appreciation for ELC cosmetics as a result of their worthy contributions to the lives of others.

Make customers central. A common business growth strategy is to be customer centric (customer focused or customer driven are two related terms), meaning the company focuses its activities and products on customer needs. The EVGP can support this strategy by helping employees understand customers and helping customers understand the depth of the company's commitment to them. Lockheed Martin, a provider of critical technology to those serving in the military, has a program called United in Gratitude that supports military service members with philanthropic contributions, fund-raising efforts and volunteer activities. By sending care packages to troops abroad, providing assistance to wounded soldiers and otherwise caring for members of the military, United in Gratitude brings to life Lockheed Martin's tagline, "We never forget who we're working for."

Fortune 500 respondent companies do not support their EVGPs nearly as generously as they support more traditional corporate functions.

Driver 3: Sufficient Investment

Highly effective EVGPs receive company resources commensurate with corporate efforts of similar scope.

The Sufficient Investment Driver helps ensure that an EVGP has the operating budget, staff and grant support required for effective management and operations. Scarce EVGP cost-benefit data make it necessary to go outside the field for guidance on EVGP operating budget and staff. Fortunately, the corporate function most comparable to the EVGP, workplace training, has robust data on staffing and expensing. While training is not volunteering, it has a charge that for resource planning purposes is sufficiently similar: designing, recruiting and engaging employees in workplace activities that are both an employee benefit and a corporate program. This is not to say these two functions are comparable in any substantive way. The analysis merely concluded that, with appropriate adjustments, training data on staffing and costs are reasonable proxies for use in EVGP planning.

The operating budget U.S. companies dedicate to training is, on average, \$10 per employee training hour offered (excluding salaries, as these are treated separately).^{xxii} However, a component-by-component cost analysis reveals that only approximately 38 percent of training expenses apply to volunteering, and that there are no large-ticket expenses associated with volunteering not also associated with training. Training expenses that generally apply to volunteering include technology, event management, communications, supplies and transportation. On the other hand, training accrues content development and instructor costs that volunteering generally does not (grants to nonprofits are

treated separately). Analyzing the training component data applicable to volunteering suggests that every employee hour of volunteering organized by the EVGP requires an investment of approximately \$3.80 (excluding salaries, which are treated separately). Of course, this is a general benchmark that may not apply to highly specialized programming such as service sabbaticals or volunteering involving overseas travel.

Applying \$3.80 per employee hour of company-organized volunteering to the standard of eight hours of volunteering per employee per year (see Driver 4) results in a suggested annual operating budget for EVGPs of \$30 per employee.

For EVGP staffing, again, the best data come from workforce development research. U.S. companies dedicate one full-time manager, or its Full-Time Equivalent (FTE), for every 30,000 hours of employee training offered annually.^{xxiii} Again, making this figure germane to EVGPs requires substantial adjustments (see above). After these adjustments, the data suggest that EVGPs need one FTE for every 80,000 hours of company-supported employee volunteering. Applying the standard of eight volunteer hours per year per employee (Driver 4), EVGPs need one FTE to manage the program (excluding administrative, support and technical staff) for every 10,000 employees in the company (regardless of how many volunteer), but not fewer than two FTEs in total. Due to underlying assumptions of the data analysis, this figure is not valid for companies with fewer than 3,000 employees.

Current knowledge suggests that, because nonprofits often do not have the resources to prop-

erly manage volunteers, EVGP nonprofit partners typically need financial support to fully benefit from employee volunteering.^{xxiv, xxv, xxvi} Analysis of community involvement awards programs administered by the Points of Light Institute and HandsOn Network, the U.S. Chamber of Commerce and others indicates that the most effective employee volunteering efforts provide cash and in-kind grants to nonprofit partners amounting to approximately \$100 per employee. Financial support can be offered in many ways, including through dollars-for-doers grants, one-time grants for large group events, competitive grants directed to organizations that receive employee volunteers and in-kind gifts.

The only objection raised by survey respondents to the Sufficient Investment Driver was that it seemed “pie in the sky” in their organizational culture. The poor performance of Fortune 500 survey respondents on this driver supports this contention. While the suggested amount represents a level of investment in the EVGP comparable to what companies invest in HR functions with charges of similar scale, it is higher than what most companies are accustomed to expending on EVGPs. Historical levels notwithstanding, this driver presents what size investment research suggests is necessary for EVGP effectiveness.

Key findings and successful practices for Sufficient Investment

Fortune 500 respondent companies do not support their EVGPs nearly as generously as they support more traditional corporate functions. Investing in EVGPs appears to be dampened, in part, by internal stakeholders not recognizing the business benefits of employee volunteering, but instead considering it a job requisite that is largely inconse-

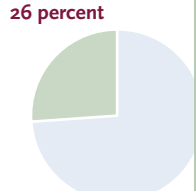
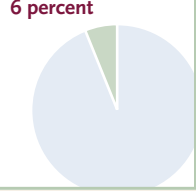
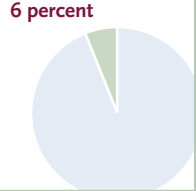
quential to business performance. Fortune 500 respondents that align themselves with business interest by having public business goals (see Driver 2) such as “improve morale” or “develop workplace skills” perform better on this driver than those that don’t: 19 percent versus 9 percent compliance.⁴ Following are selected practices from companies that successfully leverage the business case to secure support or that perform well on other parts of this Sufficient Investment Driver.

Integrate the EVGP into the business strategy.

EVGPs that make themselves indispensable to business success are more likely to receive sufficient resources. As cited earlier, Fortune 500 respondent EVGPs with written business goals, such as employee retention or leadership development, have larger budgets on a per-employee basis than their counterparts. Suzanne Payne from Unum explains that Unum’s EVGP is well funded because “we have an executive team that believes that corporate social responsibility is a vital part of our business strategy.” IBM’s Corporate Service Corps, in which teams of employees volunteer for weeks or months on projects that intersect economic development and information technology in developing countries, is an example of EVGP integration with business strategy. This high-cost project is feasible because it helps achieve aims central to IBM’s success – increasing the company’s global reach; building a network of international teams; and developing global leaders, professionals and empowered citizens in the 21st-century workforce.

⁴ This finding is correlative, not causal. It is not possible to confirm or reject from survey data that high performance on the Strategic Business Positioning Driver caused the high performance on the Sufficient Investment Driver.

Sufficient Investment Driver: Indicators, survey questions and performance

Indicator	Survey Questions <i>(modified for on-paper presentation and excluding response categories)</i>	Percentage of F500 Respondents Meeting Indicator <i>(average)</i>
<p>3.1 Strong Team</p> <p>Has at least one full-time paid professional position for every 10,000 employees, and not less than two total, to manage the program (not organize events)</p>	<p>To meet this indicator requires that provided Full-Time Equivalent (FTEs) in question 3.1.1 are at least two, and that the number of employees divided by the number of FTEs is less than 10,000.</p> <p>3.1.1 How many Full-Time Equivalents (an FTE is one full-time position or its equivalent over several positions) – excluding administrative, project organizing, technical and specialized support – are dedicated to managing the EVGP per their job description (or consultant agreement, if outsourced)? (“Managing” refers to developing and running the overall program and excludes specialized functions such as Web applications and event organizing.)</p>	<p>26 percent</p> 
<p>3.2 Adequate Operating Budget</p> <p>Expend at least \$30 per employee in operations, and not less than \$500,000 total (operating budget excludes salaries and grants)</p>	<p>To meet requires that the response to 3.2.1 is not less than \$500,000 and that when it is divided by the number of employees, it results in \$30 or more.</p> <p>3.2.1 How much does the EVGP expend annually in operations (this includes technology costs, T-shirts, supplies, travel and other operating expenses, but excludes salaries and grants)?</p>	<p>6 percent</p> 
<p>3.3 Grant Support</p> <p>Grants to support employee volunteering at nonprofit organizations total at least \$100 per employee (e.g., dollars for doers, team grants, other grants tied to volunteering)</p>	<p>To meet this indicator requires that the total of responses to 3.3.1-3.3.3, below, divided by the number of employees is \$100 or more.</p> <p>3.3.1 How much did the company spend on dollars-for-doers grants in the most recently completed fiscal year?</p> <p>3.3.2 How much did the company spend on volunteer team grants?</p> <p>3.3.3 If there are any other company grants that support volunteering, what do they total?</p>	<p>6 percent</p> 
<p>Overall performance: Fortune 500 respondents have, on average, 13 percent compliance with this driver.</p> <p>Note: This driver is not applicable to companies with fewer than 3,000 employees.</p>		

Increase magnitude of donations by leveraging commercial product. As a resource needed across all departments all the time, cash is often difficult for EVGPs to secure. US Airways has found a way around the need for cash in its “dollars-for-doers” grants program. Through Flights for 50, employees who volunteer at least 50 hours for one organization can direct a \$500 US Airways gift card to the organization. Similarly, HP’s Employee Product Gift Matching Program eliminates the need for cash donations as employees can donate HP products to schools and nonprofit organizations by covering 25 percent of the product list price. HP’s “match” is paid in kind by means of the remaining 75 percent of the product.

Align competitive grants and volunteering synergistically. Dollars-for-doers grants naturally support volunteering. Allstate and Citi, however, have practices to have their competitive grants programs also support their EVGPs and in this manner strengthen both their volunteering and the grants programs.

Driver 4: Culture of Engagement

Highly effective EVGPs benefit from company-wide facilitation and encouragement of employee involvement in the community.

Background

Research finds that two components are needed for an EVGP to evolve into a meaningful workplace program: facilitative procedures, practices and guidance, and encouraging workplace culture. Procedures, practices and guidance generate the permission, organization and ease needed for substantial employee involvement.^{xxvii} Active employee involvement,

however, also requires a workplace culture that considers the EVGP relevant to the company overall, to departments, to managers and to employees; and that permits and promotes employee volunteering.^{xxviii} The Culture of Engagement Driver helps ensure these components are in place.

Some survey respondents were surprised that a time-off policy for volunteering is not a requirement of the Culture of Engagement Driver (it helps but is not essential to meeting one indicator). The impact that a time-off policy has on an EVGP is complex. Several companies have experienced an increase in participation after introducing release time, but others have not. Furthermore, one study found that providing time off did not increase volunteering.^{xxix} Similarly, approximately half of the strongest EVGPs, as identified by the Awards for Excellence in Workplace Volunteer Programs conferred by the Points of Light Institute and HandsOn Network, do not offer release time for volunteering.^{xxx} These contradictory findings can be explained by examining the role time-off policies play in communications. If publicized, a time-off policy proclaims that the company values volunteering enough to dedicate substantial resources. Amazingly this message of corporate support for volunteering appears to have a more dramatic impact on the EVGP than the accommodation of volunteering during work hours itself, which customarily faces many challenges to widespread adoption. However, the time-off policy’s message of corporate support for volunteering can be delivered also through a dollars-for-doers grant program, which also “puts its money where its mouth is.” Thus, release time for volunteering is helpful but not essential. This Fortune 500 survey corroboration

rates this hypothesis. Meeting the facilitative procedures indicator 4.1 correlates with the same uptick in EVGP participation of approximately 6 percent of employees whether the company meets this driver using a time-off policy or a dollars-for-doers policy.⁵

Key findings and successful practices for Culture of Engagement

Although Fortune 500 respondent companies generally have weak outreach to middle management and to departments, overall they score higher on Culture of Engagement than on all but one driver. The following are some of the ways they achieve this success.

Offer service sabbaticals. Service sabbaticals, or full-time employee volunteer opportunities lasting weeks or months, can help ground volunteering in the workplace, especially if tied to business needs. Wells Fargo's Volunteer Leave Awards Program, for example, awards team members up to four months off, with full pay and benefits, to work with a nonprofit of their choice to help solve social problems important to them and to build the nonprofit's long-term sustainability.

Involve customers. One way to energize employee volunteering is to involve customers in volunteering. Thrivent Financial for Lutherans provides opportunities for its customers to go on build trips through its Thrivent Builds with Habitat for Humanity alliance. Through this program, customers can sign up to go to El Salvador, for example, to build homes with Thrivent employees.

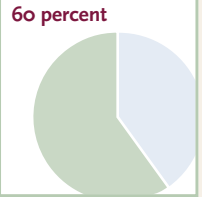
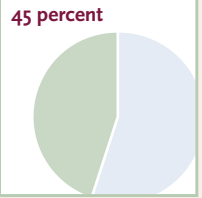
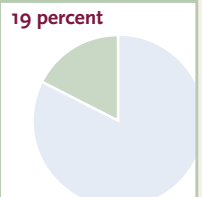
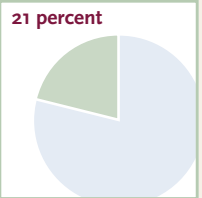
Similarly, Starbucks customers join employees in service trips to Costa Rica, for example, to help a coffee cooperative adopt sustainable agriculture practices. Starbucks also involves customers in a completely different manner. Its "I'm in!" campaign invited members of the public to pledge five volunteer hours in support of President Obama's call to service, provided an online tool to find volunteer opportunities and rewarded the pledge with a free coffee drink.

The Walt Disney Company involves its young customers in volunteering. Readers of Disney's FamilyFun magazine, the nation's largest magazine targeting families with children 3-12 years old, submit what they do as a family to volunteer. Disney highlights winners of the FamilyFun Volunteers contest in the magazine and makes a donation to their charity of choice. Furthermore, Disney's Minnie Grant program provides grants of up to \$500 to support child-led service projects.

Finally, IBM leverages its connections to computer owners worldwide in its support of the World Community Grid, a project that harnesses the unused processing power of personal computers across the globe to help solve some of humanity's most persistent problems. The project gets personal computer users to download the free IBM-developed software and become part of the grid. By involving personal computer owners, the IBM-built World Community Grid can reduce from decades to months the time it takes scientists to develop new strains of rice with larger and more nutritious yields, to conquer cancer or develop clean energy.

⁵ This finding does not necessarily mean that greater participation was the result of the indicator being met. It is not possible to determine causality from these data.

Culture of Engagement Driver: Indicators, survey questions and performance

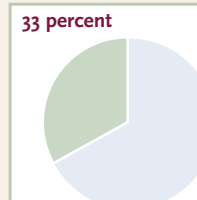
Indicator	Survey Questions <i>(modified for on-paper presentation and excluding response categories)</i>	Percentage of F500 Respondents Meeting Indicator <i>(average)</i>
<p>4.1 Facilitative Procedures</p> <p>Has universal procedures/practices/guidance to facilitate employee involvement</p>	<p>To meet this indicator requires a yes to one of the two questions.</p> <p>4.1.1 Does your company offer release time for volunteering?</p> <p>4.1.2 Does your company offer an employee grant program (e.g., dollars for doers, matching gift)?</p>	<p>60 percent</p> 
<p>4.2 Formal Encouragement</p> <p>Has universal procedures/practices/guidance to create interest and enthusiasm for employee volunteering</p>	<p>To meet this indicator requires at least two sets of procedures/practices/guidance in response to the single question.</p> <p>4.2.1 How many companywide procedures/practices/guidance does your company have to demonstrate that it values employee community involvement? (e.g., awards programs, contests and celebrations)?</p>	<p>45 percent</p> 
<p>4.3 Business Department Support</p> <p>Business units supported by EVGP, per the EVGP's business goals, promote employee involvement</p>	<p>To meet this indicator requires a yes to the single question.</p> <p>4.3.1 Does/do the department(s) responsible for business goals the EVGP aims to support have procedures/practices/guidance to encourage EVGP participation (e.g., HR includes volunteering in development plans or scorecards)?</p>	<p>19 percent</p> 
<p>4.4 Middle Management Outreach</p> <p>Educates middle managers on the relevance of the EVGP to their responsibilities</p>	<p>To meet this indicator requires a yes to the single question.</p> <p>4.4.1 Does the company have educational efforts in place to inform middle managers how the EVGP can support their efforts as managers?</p>	<p>21 percent</p> 

4.5 Senior Management Modeling

Has senior executive public participation

To meet this indicator requires a yes to the single question.

4.5.1 Have at least 30 percent of the individuals in the top two levels of the company (chief executive and direct reports to the chief executive) publicly participated in an employee volunteer event in the last year?

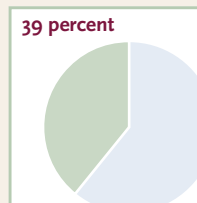


4.6 Accessible Information

Makes information on how to get involved easily available

To meet this indicator requires a yes to 4.6.1 and at least two other methods selected from 4.6.2.

4.6.1 Does the EVGP have a website that provides information to any employee on how to get involved?
4.6.2 Does the EVGP have other methods to provide information to any employee on how to get involved. (e.g., company newsletter, new hire materials and training materials)?



Overall performance: Fortune 500 respondents have, on average, 36 percent compliance with this driver.

Enliven the EVGP with an online community of giving. Aetna's employee volunteering website enables employees to post their team volunteer stories and pictures, and comment on each other's stories. Employees also vote for their favorite employee-posted stories, and winning teams receive grants for their nonprofit organizations. Similarly, Starbucks' public social networking site, MyStarbucksIdea.com, includes involvement as one of three topics (along with product and experience). Anybody with Web access can suggest an idea for community involvement, comment on others' postings and vote on posted ideas. Starbucks reviews and, as appropriate, implements ideas from the site.

Offer a gateway-to-volunteering event. Experiencing volunteering once often leads

to ongoing engagement. Thus, an all-company single-day volunteer event can be a good way to create ongoing volunteers. Frances Kennedy from Deloitte says the EVGP's 75 percent employee participation rate can be partly explained by the eye-opening effect of IMPACT Day, an annual day of service. "IMPACT Day is a gateway volunteerism event for many. They come away determined to become more involved and immediately want to start planning projects for the rest of the year or the next IMPACT Day."

Support HR's skill-development programs. Getting Human Resources to advocate for volunteering can boost the stature and popularity of the EVGP. Companies position volunteering as an HR solution in several ways. Genworth Financial uses volunteer-



Unum employees landscape Children's Home/
Chambliss Shelter in Chattanooga, Tennessee,
during 2008 Community Service Day.

ing as a vehicle for developing management skills. During its annual talent review, HR and EVGP managers identify employees who are looking to develop project management or related skills to invite them to serve as a Genworth Volunteer Council member or project leader. At Aetna, HR suggests volunteer opportunities to populate employee development plans, which employees create every year. The online development plan application presents volunteer activities as options for building skills. For example, an employee looking to develop expertise in collaborative negotiation is directed to consider becoming a volunteer mediator.

Customize messages for managers. Middle managers often consider employee volunteering irrelevant to their production-focused charges. Many companies combat this by reaching out to managers with customized messages that explain how volunteering can support them. For example, Texas Instruments' EVGP staff holds one-on-one meetings with managers, Cummins has an EVGP handbook for managers and IBM includes the benefits of volunteering in its manager development guides. Similarly, Symantec's e-mails to congratulate employee volunteers, such as for 25 hours of service during the 25th Anniversary Volunteer Challenge, are sent to employees' managers as well.

Driver 5: Strong Participation

Highly effective EVGPs have meaningful levels of involvement from the majority of employees.

A persistent question for EVGPs is, "What level of employee engagement puts the program in its 'sweet spot' of effectiveness – where there is enough engagement to ef-

ficiently generate impact but not so much pressure to participate that the program loses its voluntary nature?" Fortunately, there are several research products that shed light on this question.

Research suggests that majority employee participation in the EVGP is sufficient to accrue meaningful employee benefits, where EVGP participation is defined as company-organized, release-time or other company-supported volunteering.⁶ Given that fewer than one-third of Americans volunteer annually, 50 percent participation is ambitious. However, this magnitude of volunteering is attainable without having to make volunteering compulsory or close to it, which research has found to be counterproductive.^{xxxii}

There is evidence that the positive effects volunteering has on personal well-being, skill development, teamwork and health do not accrue with short-term episodic volunteering.^{xxxiii, xxxiv} Meaningful employee benefits requires at least two days of volunteer activity per year. Similarly, research has found that nonprofits are better served with skills-based volunteering which, by design, requires a commitment of more than a few hours to be truly helpful.^{xxxv} For these reasons, this driver establishes the standard of 16 hours of volunteering per employee volunteer. However, since the suggested participation standard is 50 percent of a company's employees the hours standard expressed as an average across all employees is eight hours a year per employee in company-supported volunteering.

⁶ The level of participation needed for meaningful community impact could not be determined due to lack of research on this topic.

Key findings and effective practices for Strong Participation

Strong Participation is the driver with the weakest Fortune 500 survey respondent performance. Fortune 500 respondents that track participation, on average, involve 21 percent of employees in EVGP volunteering and generate an average of less than three hours of volunteering per employee. Nevertheless, some respondents perform well on all or parts of this driver. Below are selected practices these companies employ.

Incentivize and recognize participation.

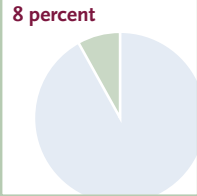
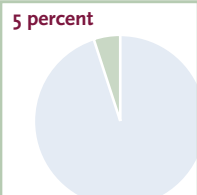
Incentives can add appeal to volunteering, especially for non-volunteers, and send

a message that the company’s support for volunteering is genuine. Fortune 500 survey respondents have a wide variety of incentives. For example, Avon employees can earn up to 24 hours of additional vacation time by volunteering; and Capital One’s Volunteer of the Year is provided the option to attend the National Conference on Volunteering and Service which, in addition to being a rewarding experience, helps strengthen the winner’s volunteer spirit.

Create turnkey volunteer opportunities.

Making volunteering easy increases volunteering. IBM’s On Demand Community is a Web portal that arms employees with a set of IBM technology tools targeted for

Strong Participation Driver: Indicators, survey questions and performance

Indicator	Survey Questions <i>(modified for on-paper presentation and excluding response categories)</i>	Percentage of F500 Respondents Meeting Indicator <i>(average)</i>
<p>5.1 Majority Participation</p> <p>Involves at least 50 percent of employees in EVGP-supported volunteering</p>	<p>To meet this indicator requires a yes to the single question.</p> <p>5.1.1 Do at least 50 percent of employees participate in company/EVGP-supported volunteering (company supported means that the company provided staff time or monetary resources to support it, including dollars-for-doers grants)?</p>	<p>8 percent</p> 
<p>5.2 Substantial Scale</p> <p>Generates at least eight hours, on average, of volunteering per employee per year</p>	<p>To meet this indicator requires that response to the single question divided by number of employees is eight or more.</p> <p>5.2.1 How many total hours do employees volunteer per year for company/EVGP-supported volunteer events?</p>	<p>5 percent</p> 
<p>Overall performance: Fortune 500 respondents have, on average, 6 percent compliance with this driver.</p>		

nonprofit community organizations and schools. There are kits – called assets – on more than 200 topics, including technology for teachers, project management and evaluation. Each asset contains the products needed to support the benefiting organization such as state-of-the-art online presentations, videos, website reference links, software solutions and documents. The ease of volunteering through this program not only increases volunteering, it increases the more valuable skills-based volunteering.

Offer skills-based volunteering. Providing volunteers the ability to use work skills normalizes the volunteer experience and attracts employees who may not otherwise volunteer. Of course, it is also an effective way to support nonprofit organizations. Twenty-four percent of Fortune 500 respondents have a skills-based volunteer program. The McGraw-Hill Companies' Writers to the Rescue, for example, provides the services of writers, editors, and communication and/or public relations specialists to nonprofit organizations. Similarly, Capital One maintains a robust pro bono program that leverages finance and brand expertise to provide opportunities for skills-based volunteering.

Run a campaign. A high-fanfare campaign, challenge or contest can help build a volunteer-friendly workplace culture. Symantec held a 25th Anniversary Volunteer Challenge that asked employees to volunteer 25 hours of their time in support of social causes in their communities. As an incentive, each employee who met the 25-hour benchmark received a grant of \$1,000 to direct to the nonprofit organization of their choice; and the three with the most volunteer hours received

an additional \$5,000 grant. As a result, recorded volunteer hours increased more than 230 percent from the prior year, from 6,000 to 20,000 hours. To turn volunteering into an enduring practice, the one-time challenge presented volunteering as developing employee leadership and skills; contributing to teamwork throughout the organization; supporting Symantec's four core values of innovation, action, customer-driven and trust; and increasing the company footprint in communities around the globe. Furthermore, the EVGP ensured there were post-challenge communications and plans to help maintain the momentum created during the 25th anniversary.

Systematize nonprofit requests for volunteers. A common EVGP challenge is to identify nonprofits that can use the skilled, specialized or large-group volunteering that employees offer. To facilitate this matching, Qualcomm has online forms where nonprofits request employee volunteers, including board/committee members. Through a customized internal online application, employees search through the nonprofit requests for opportunities that match their interests and skills. This system not only promotes more volunteering through Qcares, as Qualcomm's EVGP is called, but more efficient volunteering. It helps employees volunteer in ways aligned to their personal interests, employee levels and skill sets. Other EVGPs that use a formal nonprofit request process include the McGraw-Hill Companies' Writers to the Rescue and Southwest Airlines' Adopt-A-Pilot, both described previously.

Prepare employees for effective volunteering. EVGPs that train employees on their volunteer charges are likely to increase the efficacy of their volunteering. For example,

Companies likely already measure business goals the EVGP promotes such as employee engagement or morale. Capturing the relationship between the EVGP and such goals is often a matter of adding one or a few questions to existing instruments.

the Pacific Gas and Electric Company provides its leadership team members with nonprofit board training before they join a nonprofit board of directors.

Driver 6: Actionable Evaluation

Highly effective EVGPs track their efforts, hold themselves accountable to their outcome goals and implement evidence-based improvements.

Management theory has long established that measuring progress toward goals, analyzing and learning from the data and making appropriate management adjustments are essential to effectiveness. Indeed, one of the most hallowed management principles is, “You get what you measure.”^{xxxvi} The Actionable Evaluation Driver helps ensure that the EVGP applies these critical measurement practices. It appears that Fortune 500 EVGP managers accept the importance of measurement. Survey respondents did not express any objections to this driver and several requested assistance on improving their performance on it.

Key findings and successful practices for Actionable Evaluation

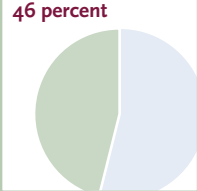
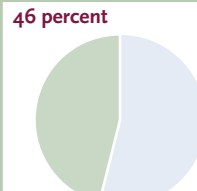
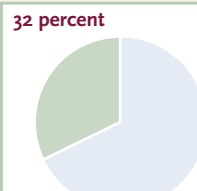
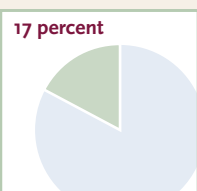
Large numbers of Fortune 500 respondents assess how well the program is delivered (process evaluation) by tracking items such as satisfaction, participation levels and volunteer hours. However, few track what changed because of the EVGP – both in terms of business and community outcomes (outcome evaluation). The following are selected practices from companies that perform well on all or parts of the Actionable Evaluation Driver.

Piggyback on established company metrics. Companies likely already measure business goals the EVGP promotes such as employee

engagement or morale. Capturing the relationship between the EVGP and such goals is often a matter of adding one or a few questions to existing instruments. Aetna, Allstate and JCPenney have included one or more questions around EVGP participation in their employee morale/engagement survey to shed light on the relationship between participation and well-established HR metrics such as morale and engagement. One well-worded question can provide meaningful information on business impact. For example, Aetna learned that there was a statistically significant positive correlation between employees’ participation in the EVGP and their rating Aetna a “good place to work.” Similarly, Allstate, JCPenney and UGI Utilities measure the effect the EVGP has on their reputation by adding one or more questions to company surveys of customers or the public.

Insert outcome questions in satisfaction surveys. Most people consider participant surveys a way to collect satisfaction levels and feedback, not a way to measure the program’s outcomes (changes in the community or company). However, many HR outcomes can be measured with reasonable validity via employee survey questions. For example, Eli Lilly’s post-event survey asks participants to what extent the “Day of Service was a meaningful team-building event for my area” (on a scale). Provided there are no reasons for respondents to misrepresent their views or other threats to validity, this simple question is a reasonable measure of the event’s team-building effect and can certainly help determine which events are more conducive to team building.

Actionable Evaluation Driver: Indicators, survey questions and performance

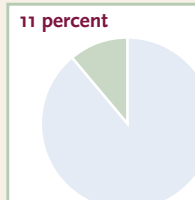
Indicator	Survey Questions <i>(modified for on-paper presentation and excluding response categories)</i>	Percentage of F500 Respondents Meeting Indicator <i>(average)</i>
<p>6.1 Participation Metrics</p> <p>Tracks employee participation in EVGP volunteering</p>	<p>To meet this indicator requires a yes to the single question.</p> <p>6.1.1 Are the number and percentage of employees who volunteer tracked annually (per whatever definition of volunteering the company uses)?</p>	<p>46 percent</p> 
<p>6.2 Volume Metrics</p> <p>Tracks employee EVGP volunteer hours</p>	<p>To meet this indicator requires a yes to the single question.</p> <p>6.2.1 Are the number of employee volunteer hours tracked annually (per whatever definition of volunteering the company uses)?</p>	<p>46 percent</p> 
<p>6.3 Employee Feedback</p> <p>Collects employee feedback</p>	<p>To meet this indicator requires a yes to the single question.</p> <p>6.3.1 Are employees asked for feedback annually on the EVGP through a systematic and formal mechanism?</p>	<p>32 percent</p> 
<p>6.4 Nonprofit Feedback</p> <p>Collects nonprofit partner feedback</p>	<p>To meet this indicator requires a yes to the single question.</p> <p>6.4.1 Are nonprofit partners asked for feedback annually on the EVGP through a systematic and formal mechanism?</p>	<p>17 percent</p> 

6.5 Business Outcomes Metrics

Tracks business outcomes

To meet this indicator requires a yes to the single question.

6.5.1 Is the degree to which the EVGP impacts its business goals evaluated at least every three years?

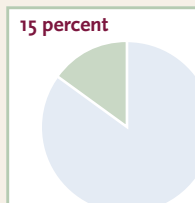


6.6 Social-Sector Outcomes Metrics

Tracks community outcomes

To meet this indicator requires a yes to the single question.

6.6.1 Is the degree to which the EVGP generates improvement in nonprofit/community causes it serves evaluated at least every three years?



Overall performance: Fortune 500 respondents have, on average, 28 percent compliance with this driver.

Enlist nonprofit help. Partnering with recipient nonprofit organizations can be a viable way to obtain data on the community impact of the EVGP. Companies can even use their grant program to fund development of nonprofits' evaluation capacity. Capital One, eBay and Unum work with nonprofit partners to collect data on the community impact of their EVGPs.

Engage experts in evaluation. To capture more sophisticated metrics such as community impact, IBM and other Fortune 500 respondents solicited the services of third-party evaluators.

Use the built-in measurements of skills-based volunteering. Skills used in the

workplace are customarily measured for results. Skills-based volunteering can often leverage these established and validated measurement practices. A corporate communications department helping a nonprofit improve its marketing or an accounting firm helping low-income individuals complete their taxes can track outcomes using the systems of their professional work. For example, when Eli Lilly provided Six Sigma professionals to the Indiana Department of Child Services as part of the Six Sigma process, it was able to estimate that the department's savings were between \$3 million and \$5 million per year.

No sooner had the drivers laid down a rough path to greater EVGP effectiveness, than community involvement professionals were on the path illuminating the way forward.

Conclusions

As the trailblazers of an emergent field, community involvement professionals have long managed their Employee Volunteering and Giving Programs (EVGPs) without benefit of an established path to success. From determining if a fund-raising event should be continued to selecting which workplace policies to pursue, their everyday decisions have been laden with uncertainty.

Fortunately, the body of knowledge relating to employee volunteering is finally robust enough to begin identifying the EVGP components that lead to meaningful and substantive impact in the community and the company. Research findings on what generates impact are now codified into six Drivers of Effectiveness for EVGPs:

1. Cause-effective Configuration
2. Strategic Business Positioning
3. Sufficient Investment
4. Culture of Engagement
5. Strong Participation
6. Actionable Evaluation

These drivers, measured per the indicators and survey items underpinning each, compare EVGPs against an absolute and ideal benchmark of effectiveness. Companies that perform well on the drivers can feel confident that their EVGPs are meaningfully and substantively impacting the community and the company, as best can be determined with existing research. More important, the indicators of unmet drivers list the actions needed to propel the EVGP to higher impact.

This project also tested the drivers on over

200 Fortune 500 companies by means of a survey. The survey collected feedback on the drivers, measured compliance with the drivers, established a peer-to-peer relative benchmark and identified best practices from high performers.

Survey findings show that employee volunteering has succeeded in establishing a foothold in corporate America. More than nine in 10 Fortune 500 survey respondents have formal EVGPs.

Having made it to the mainstream, however, employee volunteering is now challenged to make an impact. As would be expected of a nascent field that has lacked research-informed feedback, existing EVGPs are far from the ideal state of effectiveness established by the drivers. The overwhelming majority of Fortune 500 respondent companies have a compliance with the drivers of less than 50 percent. As a result, EVGPs are not maximizing their impact.

This is not to say that EVGPs are not contributing to the wellbeing of employees, businesses and, most important, communities. Across every indicator of every driver, some companies are decisively and often ingeniously demonstrating success. From turning an internal organizational success into a charitable impact to cleverly repurposing a commercial product for the greater good to using standard company metrics to measure EVGP impact, effective practices abound. Nevertheless, the potential of transforming our social and corporate sectors that resides within employee volunteers remains largely untapped.

However, if company response to date is any indication, the promise of employee volunteering will be realized. No sooner had the drivers laid down a rough path to greater EVGP effectiveness, than community involvement professionals were on the path illuminating the way forward. They redesigned

their service days to better resonate with the workplace, reached out to nonprofit partners to restructure their joint work, and otherwise turned the new written guidance into greater public good. In the end, that is the hope: that this report helps those managing employee volunteering achieve greater good.

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“Assessing against the drivers was vital to identifying our gaps and strengths and to creating a credible strategic plan for global employee engagement.”

Tracy King, director of community engagement at the Levi Strauss Foundation

Project advisers

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The potential of transforming our social and corporate sectors that resides within employee volunteers remains largely untapped. It is hoped that community involvement professionals will find this report useful in their efforts to better tap into the power of employee volunteers.



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