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LBG ASSOCIATES

ABOUT US

LBG Associates is a woman-owned consulting firm focused on designing, implementing and managing strategic community relations and corporate contributions programs and initiatives. Founded in 1993 by Dr. Linda Gornitsky, LBG Associates is committed to providing clients with creative and innovative solutions in a personal, professional, cost-effective and timely manner. With offices near New York and Washington, DC, we pride ourselves on being small enough to respond to client's needs, yet large and diverse enough to handle any project or task.

OUR SERVICES

In response to clients' needs, LBG Associates' services range from the evaluation and analysis of a particular contributions program, to the design, implementation and management of entire image/community awareness campaigns. More specifically, LBG Associates helps clients establish and maintain images as Good Corporate Citizens and Socially Responsible Companies by offering custom-tailored services on the following topics:

- | | |
|---|--|
| ✓ Foundation & Corporate Giving | ✓ Program Measurement & Evaluation |
| ✓ Employee Giving & Volunteerism | ✓ Research & Benchmarking Capabilities |
| ✓ Strategic Relationship Development | ✓ Special Events Planning & Sponsorships |
| ✓ Signature Programs & Global Relations | ✓ Training & Staff Development |
| ✓ Strategic Communications Development | |

ADDITIONAL PUBLICATIONS

CORPORATE VOLUNTEERISM: Innovative Practices for the 21st Century

CORPORATE VOLUNTEERISM: Innovative Practices for the 21st Century focuses on creative, “out-of-the-box” strategies and programs on corporate volunteerism, and provides information on how to leverage and incorporate them with/into current initiatives. This study goes beyond the “how-to” primers or reports that are currently available, by focusing exclusively on best practices. More specifically, the report provides real-life examples on how leading companies and corporations are successfully and creatively:

- ✓ Marketing their programs and recruiting employee volunteers
- ✓ Generating senior management buy-in and support
- ✓ Tracking, measuring and evaluating volunteer events and activities
- ✓ Recognizing and rewarding employee volunteerism
- ✓ Developing national volunteer events and activities
- ✓ Encouraging corporate volunteerism on a global basis
- ✓ Utilizing volunteerism for teambuilding purposes and skills/leadership development
- ✓ Overcoming obstacles and challenges affecting volunteer programs

Furthermore, the report covers such topics as: the “Key Components” needed to build a successful volunteer program; developing effective volunteer guidelines and policies, including formal release policies and paying/compensating employee volunteerism; volunteer staffs and budgets; volunteer councils and committees; Dollars For Doers and other recognition programs; and developing employee- and family-friendly volunteer events and activities. The study will prove to be a significant benefit to community relations, public affairs and human resource professionals, as well as volunteer council/committee members, volunteer “champions” and coordinators. (424 pages)

CORPORATE PHILANTHROPY IN TIMES OF CRISIS

The horrific events of September 11th were tragedies of such epic proportions that none of us could have possibly foreseen or prepared for them. Then again, how many of us are prepared for any crisis of any magnitude, such as earthquakes, floods, hurricanes and tornadoes, as well as acts of terror? Not many, and this needs to change!

Through this groundbreaking study – *Corporate Philanthropy in Times of Crisis* – LBG Associates takes the first-ever, in-depth look at Corporate America’s role in aiding and supporting communities ravaged by the affects of both natural and man-made disasters. Compiled from interviews with nearly 100 corporations and disaster relief experts – including

FEMA, American Red Cross, The Salvation Army, NVOAD and others – this study provides guidance on how companies can better respond to future disasters by working more closely and more effectively with local, state and national emergency management agencies and disaster relief organizations. Specifically, this study:

- ✓ Presents views from the public, private and non-profit communities on Corporate America's role in domestic/U.S. disaster relief, from choosing non-profit partners, to determining the level of assistance and budgeting for disaster relief;
- ✓ Documents corporate community outreach programs and initiatives related to disaster response and recovery;
- ✓ Highlights corporate philanthropic trends and practices covering cash, product and in-kind contributions, as well as employee giving and volunteerism;
- ✓ Introduces some of the lesser known volunteer organizations active in disasters and their roles in the response and recovery processes;
- ✓ Identifies the true needs of disaster relief and volunteer organizations; and
- ✓ Provides clear and distinct recommendations on how companies can be more proactive in their approach to disaster relief, especially through mitigation, preparedness and education.

BEST PRACTICES IN EXTERNAL CORPORATE DIVERSITY

During the '80s and '90s, much of corporate America committed itself to the practice and promotion of diversity in terms of HR and other internal operations – training, awareness, workforce composition, management and promotions, etc. *But what about their external operations?* A corporate commitment to diversity – whether in terms of age, race, sexual orientation, religion or gender – goes beyond the assembly lines; beyond the plant walls; beyond the boardroom. It includes an assurance that external corporate activities and operations also work to support and promote the issue of diversity.

Best Practices in External Corporate Diversity 2000 examines how companies are not only managing diversity within their organizations, but taking diversity to the next level by integrating it throughout their organizations. Specifically, this groundbreaking benchmark study focuses on how diversity is being integrated into the following external operations, and the benefits they generate:

- | | |
|-----------------------------------|----------------------------------|
| ✓ Recruitment & Retention | ✓ Marketing & Customer Relations |
| ✓ Corporate Community Involvement | ✓ Corporate Communications |
| ✓ Supplier Diversity | ✓ Sponsorships & Event Marketing |

Best Practices in External Corporate Diversity 2000 serves as a vital source of information for HR, community relations and marketing professionals alike. (210 pages)

BEST PRACTICES IN CORPORATE COMMUNITY RELATIONS

As a result of corporate downsizings from mergers and acquisitions, the infusion of new technologies into business practices and an increased level of competition both domestically and abroad, companies are being forced to re-examine the way they do business – including their community relations and philanthropic activities. With fewer resources at their disposal, both in terms of monetary and human capital, community relations and corporate contributions or foundation staffs are going to have to become more strategic in responding to community problems. This report benchmarks the best practices in corporate community relations for 1998, and provides examples from over 80 of the Fortune 500 companies! (334 pages)

BENCHMARKING CORPORATE INTERNATIONAL CONTRIBUTIONS

International contributions programs are a great way to improve your response to the communities in which you operate globally. Now you can find out what works and what doesn't with this much needed and hard to find guidance on developing effective international contributions programs. Learn from the experiences of 24 global corporations in this 1996 study of their domestic and international contributions programs. Based on a study conducted by LBG Associates in conjunction with The Conference Board, this report provides concrete solutions in an area not widely covered by many other sources. (42 pages)

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EXECUTIVE SUMMARY

INTRODUCTION

The overarching aim of this study is to help companies determine the success of their corporate volunteer programs and to identify the issues they should focus on to improve their programs. To accomplish this, 47 CR/volunteer managers and 39 senior executives from industry-leading U.S. companies, and 39 of their non-profit partners, participated in telephone interviews or completed and returned extensive questionnaire over a five and a half month period from February 2004 to mid-June 2004.

Overall, corporate participants were asked to:

- ✓ Identify the value and benefits of corporate volunteer programs
- ✓ Define success and evaluate the strength of their programs
- ✓ List the “key components” necessary for a successful program
- ✓ Highlight what about each “key component” contributes to the success of volunteer programs

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW ABOUT VALUING VOLUNTEERISM

- ✓ *CR/volunteer managers and senior executives overwhelmingly agree on the benefits volunteer programs and initiatives generate for their companies and employees.*
- ✓ When trying to sell senior management on the value of corporate volunteerism, CR/volunteer managers should stress how the program benefits the community, more so than how it benefits the company and/or employees.
- ✓ To sell senior management on how their programs are benefiting the community, CR/volunteer managers are going to need to solicit community feedback, as well as measure/evaluate the impact their programs are having.
- ✓ Although senior management may want to know, and place a great value in knowing, how their volunteer program is benefiting the overall community, based on the opinions of non-profit organizations, the ability to determine a single corporate volunteer program's impact on the entire community is impossible to calculate.
- ✓ Therefore, instead of trying to demonstrate how their volunteer programs are benefiting the overall community, CR/volunteer managers may have greater success and an easier time generating senior management buy-in and support, by highlighting the impact employee involvement is having on their non-profit partners.
- ✓ Senior executives view the *Manpower/Sweat Equity* provided by volunteers and the *Financial and In-kind Resources* generated through corporate and employee giving as the most significant by-products/community benefits of their volunteer programs.
- ✓ In contrast, senior executives view the *Knowledge and Expertise* contributed through volunteering (which includes board service), the enhanced *Quality of Life* enjoyed by communities, employees and clients; and the *Relationships* that are developed and/or enhanced between companies, communities and employees, as the least significant bi-products/benefits of their volunteer programs.
- ✓ CR/volunteer managers overwhelmingly see the *Financial and In-kind Resources* generated through corporate and employee giving as the most significant bi-products/community benefits of corporate volunteerism, and *Knowledge and Expertise* as the least significant benefit.
- ✓ *It would appear that non-profit organizations appreciate the funds companies and employees contribute as a result of participating in volunteer events/activities, more so than contributions of time and talent.*

WHY COMPANIES SUPPORT VOLUNTEERISM

CR/Volunteer Managers

1. It's Part of Being a Good Corporate Citizen
2. It's Part of the Corporate Culture
3. Generates Various Employee Benefits
4. It's "The Right Thing To Do"
5. Generates Various Corporate Benefits
6. Supports Employees' Interests/Strengthen Employee Relations
7. Enhances Community Relations
8. Our Employees Expect Us To
9. Our Communities Expect Us To
10. Helps Communities Become Better Places to Live & Work

Senior Executives

1. It's Part of Being a Good Corporate Citizen
2. It's Part of the Corporate Culture
3. It's "The Right Thing to Do"
4. Supports Employees' Interests/Strengthen Employee Relations
5. Generates Various Corporate Benefits
6. Promotes Teamwork/Teambuilding
7. Generates Various Employee Benefits
8. Helps Communities Become Better Places to Live & Work

CORPORATE AND EMPLOYEE BENEFITS OF VOLUNTEERISM

CR/Volunteer Managers

1. Enhances Company's Image as a Good Corporate Citizen
2. Boosts Employee Morale/Creates Positive Work Environment
3. Elevates Employee Pride
4. Develops Employees' Business & Leadership Skills
5. Promotes Teamwork
6. Builds Brand Awareness/Generates Good PR for the Company
7. Positively Impacts Employee Recruitment
8. Positively Impacts Worker Retention
9. Enhances External/Community Relations
10. Leverages Corporate Contributions

Senior Executives

1. Enhances Company's Image as a Good Corporate Citizen
2. Elevates Employee Pride/Positively Impacts Worker Retention
3. Develops Employees' Leadership Skills
4. Develops Employees' Business Skills
5. Builds Brand Awareness
6. Boosts Employee Morale/Creates a Positive Work Environment
7. Bolsters Employees' Level of Civic Pride, Awareness & Activism
8. Positively Impacts Employee Recruitment
9. Promotes Teamwork
10. Generates Good PR for the Company

COMMUNITY BENEFITS OF CORPORATE VOLUNTEERISM

CR/Volunteer Managers

1. Supplies Non-Profits with Manpower
2. Provides Financial Support to Non-Profits via Employee Giving
3. Raises Awareness for Issues, Needs & Organizations
4. Supplies Non-Profits with Expertise/Specialized Skills
5. Provides Financial Support to Non-Profits via Corporate Contributions
6. Helps Address & Solve Specific Community Needs and Issues
7. Generates Cost Savings for Non-Profits
8. Helps Communities Become Better Places to Live & Work
9. Builds Non-Profit Capacity
10. Provides Children with Mentors & Role Models

Senior Executives

1. Supplies Non-Profits with Manpower
2. Supplies Non-Profits w/ Expertise/Specialized Skills – Builds Capacity
3. Provides Financial Support to Non-Profits via Corporate Contributions
4. Helps Address & Solve Specific Community Needs and Issues
5. Raises Awareness for Needs, Issues & Organizations
6. Helps Communities Become Better Places to Live & Work
7. Provides Financial Support to Non-Profits via Employee Giving
8. Motivates Others to Get Involved
9. Bridges the Gap Between Businesses & Communities
10. Generates Cost Savings for Non-Profits

COMMUNITY BENEFITS OF CORPORATE VOLUNTEERISM – NON-PROFITS

1. Provides Financial Support via Corporate Contributions
2. Raises Awareness for Issues, Needs & Organizations
3. Brings Communities Closer Together
4. Motivates Others to Get Involved
5. Supplies Non-Profits with Manpower
6. Helps Address & Solve Specific Community Needs & Issues
Helps Communities Become Better Places to Live & Work
8. Builds Non-Profit Capacity
Supplies Non-Profits with Expertise/Specialized Skills
Bridges the Gap Between Companies & Communities
11. Bolsters Civic Pride, Awareness & Activism
12. Provides Business Concepts & Rationales to Solve Community Issues

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW ABOUT DETERMINING SUCCESS

- ✓ First and foremost, the belief that senior management is a huge obstacle to the success of corporate volunteer programs is somewhat of a myth or stereotype. Based on the responses of those who participated in this study, senior executives and CR/volunteer managers not only consider their volunteerism program to be “Successful,” but they define success in a very similar fashion, and they want their volunteer programs to achieve/focus on the same or similar goals and objectives.
- ✓ Due to the fact that the success of volunteer programs are based overwhelmingly on the level of employee participation, managers will need to place a significant emphasis on developing and implementing accurate and effective tracking, measurement and evaluation tools and techniques.
- ✓ Managers also need to accept the fact that success is more than a “numbers game.” Accurately evaluating the success of volunteer programs, as well as appeasing senior management, requires the active solicitation of employee and community feedback. Additionally, given the fact that managers and executives both place a high priority on how volunteerism impacts their corporate and brand reputations, managers also need to consider soliciting consumer and shareholder feedback.
- ✓ Based on executives’ and managers’ definitions for success, the five most important steps managers can take to ensure the success of their volunteer programs is to conduct and/or implement the following:
 - Active, On-Going Internal Communications
 - Employee-Friendly Programs and Practices
 - Dedicated Staffs, Budgets and Resources
 - Formal and Appropriate Structures
 - Measurement and Evaluation

- ✓ Managers need to also be aware of the fact that a significant portion of success also rests in their own hands. Managers' own knowledge, skills, experience and capabilities impact the success of their volunteer programs. As such, managers should engage in continuous career education and training, as well as keep abreast of on-going trends and best practices.

TOP 10 FACTORS USED TO DETERMINE SUCCESS

CR/Volunteer Managers

1. Level of Employee Participation
2. Degree of Employee Feedback
3. Degree of Community Feedback
4. Impact on Company's Image as a Good Corporate Citizen
5. Total Number of Projects Completed/Organizations Helped
6. Degree to Which Community Benefits are Achieved
7. Impact on Brand Awareness/Recognition
8. Degree of Management Buy-in at All Levels
9. Level of Employee Awareness of Program
10. Amount of Third Party Recognition/CR Awards Won

Senior Executives

1. Level of Employee Participation
2. Degree to Which Program Goals and Objectives are Achieved
3. Degree to Which Business Benefits are Achieved
4. Degree to Which Community Benefits are Achieved
5. Degree of Employee Feedback
6. Level of Support/Resources Provided by Company
7. Level of Senior Management Buy-in and Support
8. Degree of Community Feedback
9. Level of Internal/Employee Awareness for the Program
10. Impact on Company's Image as a Good Corporate Citizen

FACTORS USED TO DETERMINE SUCCESS – NON-PROFITS

1. Level of Volunteer Participation and Retention
2. Degree to Which Community Benefits are Achieved
3. Degree of Volunteer Feedback
4. Degree to Which Program Goals and Objectives are Surpassed
5. Degree of Community/Client Feedback
6. Results of Internal Evaluations
7. Level of Volunteer Management
8. Level of Volunteer Satisfaction

THE SUCCESS OF CORPORATE VOLUNTEER PROGRAMS

CR/Volunteer Managers

19% "Highly Successful"
 51% "Successful"
 21% "Somewhat Successful"
 6% "Neutral"
 2% "Somewhat Unsuccessful"

Senior Executives

28% "Very Successful"
 31% "Successful"
 41% "Somewhat Successful"
 0% "Neutral"
 0% "Somewhat Unsuccessful"

KEY COMPONENTS OF SUCCESSFUL PROGRAMS – MANAGERS

CR/Volunteer Managers

1. Senior Management Buy-In & Support
2. Active, On-Going Internal Communications
3. Employee-Friendly Programs & Practices
4. Dedicated Staff
5. Dedicated Budget & Resources
6. Recognition
7. Formal & Appropriate Structure
8. Employee Ownership
9. Measurement & Evaluation
10. Infuse Volunteerism Into Corporate Culture
11. Programs Need to be Strategically-Focused
12. Right Community Partners
13. Signature Programs & Annual Events
14. Community Needs are Addressed/Incorporated
15. Program Needs to Generate External Visibility/Recognition

Non-Profit Organizations

1. Employee-Friendly Programs & Practices
2. Volunteer Feedback
3. Quality Volunteer Management
4. Active, Three-Way Communications
5. Formal & Appropriate Structures
6. Dedicated Corporate & Non-Profit Staffs
7. Measurement & Evaluation
8. Training
9. Dedicated Budgets & In-kind Resources
10. Community/Client Feedback
11. Senior Management Buy-in, Support & Participation

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW ABOUT THE “KEY COMPONENTS” AND PREDICTING SUCCESS

- ✓ *The success of a corporate volunteer program cannot, nor should not, be based solely on the level of employee participation, but rather on how well the program is managed against its goals and objectives.*
- ✓ In lay men’s terms, by using the following 12 “key components,” the LBG Associates’ model can predict the success of corporate volunteer programs – **for CR/volunteer managers** – with more than a **99.07% degree of accuracy**:
 - Staffing Levels
 - Program Structures
 - Budget Levels
 - Employee Participation
 - Senior Management Participation
 - Training
 - Work-Release Policies
 - Providing Paid Time-off
 - Recognition
 - Internal Communications
 - External Communications
 - Measurement & Evaluation
- ✓ Although CR/volunteer managers were given the option to identify and rate additional components, which they feel significantly impact the success of their volunteer programs, **nine out of ten CR/volunteer managers feel the LBG Associates’ model does in fact represent the “key components” of success.**

- ✓ Given that most CR/Volunteer managers have limited time, money and human resources to dedicate to their volunteer programs, based on the research, it is recommended that they focus their efforts on the following “key components:”

- Recognition
- Program Structures
- Budget Levels
- Internal Communications
- Work-Release Policies

By establishing a structure which makes it easy for employees to get involved, as well as want to get involved; by educating and informing them about the program, up-coming events and activities, and how to get involved; by providing opportunities for employees to get involved/volunteer during the workday; and by recognizing volunteers for their involvement/commitment of time and energy; companies will not only significantly increase employee participation, but they will visibly see a significant increase in the overall success of their corporate volunteer programs. To achieve success, CR/volunteer managers will also need to secure adequate funding for volunteer programs and initiatives, funding which senior management may be more willing to provide than managers may think they are.

IMPACT ON SUCCESS – MANAGERS

1. Employee Participation
2. Active, Internal Communications
3. Program Structures
4. Measurement & Evaluation
5. Recognition
6. Senior Management Participation
7. Work-Release Policies
8. Training
9. Budget Levels
10. Staffing Levels
11. External Communications
12. Providing Paid Time-Off

PREDICTORS OF SUCCESS – MANAGERS

1. Recognition
2. Program Structures
3. Budget Levels
4. Employee Participation
5. External Communications
6. Providing Paid Time-Off
7. Work-Release Policies
8. Internal Communications
9. Training
10. Staffing Levels
11. Measurement & Evaluation
12. Senior Management Participation

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW ABOUT PROGRAM STRUCTURES

- ✓ In general, there are four structures that companies can utilize to organize their volunteer programs: ***Company-directed*** (centralized); ***Employee-driven*** (decentralized); ***Third-party managed*** (outsourced) and ***Hybrids*** (combination).
- ✓ While choosing the appropriate program structure is important, especially for companies in the early stages of developing a corporate volunteer program, the research indicates that success varies only slightly among the different program types.

- ✓ Ultimately, however, the more companies encourage and support *individual employees* to not only volunteer, but get involved in planning, organizing and coordinating events/activities, the greater the likelihood that they will have a more successful program.
- ✓ Managers who feel current program structures are appropriate rely significantly more on *individual employees* and *volunteer councils/committees* to plan, organize and carry-out volunteer events and activities than managers who feel their program structures are inappropriate.

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW ABOUT STAFFING AND BUDGET LEVELS

- ✓ *Adequate staffing and budget levels are significant to the success of every corporate volunteer program.*
- ✓ Research shows that there is a direct correlation between staffing levels and the success of corporate volunteer programs.
- ✓ To achieve the level of success senior executives expect of volunteer programs, companies need to significantly increase the number of people assigned to manage volunteer programs and activities.
- ✓ *Ideally, companies with at least 1,000 employees should maintain at least 1 FTE coordinator/manager to oversee volunteer programs, events and activities.*
- ✓ *The ideal staff to employee ratio for a “Successful” volunteer program is 1 FTE volunteer coordinator per every 5,837 employees.*
- ✓ To achieve the level of success senior executives expect of volunteer programs, most companies will need to significantly increase current spending/budget levels for volunteer programs and initiatives.
- ✓ *Ideally, companies with at least 1,000 employees should budget approximately \$12.34 per every employee, not just those that volunteer, in order to have and/or maintain a “Successful” volunteer program.*

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW ABOUT MEASUREMENT & EVALUATION

- ✓ Both CR/volunteer managers and senior executives agree that *Measurement and Evaluation* is key to the success of their volunteer programs.

- ✓ Managers from companies that do not track employee participation, yet base the success of their programs on employee participation, cannot possibly know whether or not their programs are successful, nor to what degree.
- ✓ When tracking employee participation, CR/volunteer managers should focus on:
 - Total number of unique employee volunteers
 - Total number of hours served by all employees
 - Types of activities/services performed by employees
 - Number of hours served by individual employees
 - Types of skills used/practiced by employees
- ✓ The more frequently CR/volunteer managers utilize *formal instruments or tools* to track employee participation, the more successful they feel their programs are.
- ✓ Additionally, the more frequently CR/volunteer managers share information on employee participation with senior management, and the more data/information they share, the more successful CR/volunteer managers feel their programs are.
- ✓ *Ideally, CR/volunteer managers should try and share all the data/information they track/collect on employee participation with senior management on a quarterly and yearly basis.*
- ✓ To generate greater buy-in and support from senior management, CR/volunteer managers should also consider tracking and reporting:
 - Types of organizations employees volunteer with
 - Employee participation broken-out by regional/business unit
 - Volunteer-related corporate contributions
 - Volunteer-inspired/related employee giving
- ✓ CR/volunteer managers from companies that measure and/or evaluate volunteer events/activities rate their programs more successful than the programs of their peers whose companies do not measure and/or evaluate volunteer events/activities.
- ✓ The more frequently CR/volunteer managers utilize a *formal instrument or tool* to measure and evaluate volunteer events and activities, the more successful they feel their programs are.
- ✓ Current budget and staffing levels (resources) have little to no bearing on whether or not companies are measuring and/or evaluating the success or impact of their programs. The majority of CR/volunteer managers do not measure and/or evaluate volunteer events/activities either because they lack the knowledge and/or experience to do so. As a result, these managers should consider undergoing training or utilizing external resources, such as LBG Associates, to measure and evaluate their programs.

- ✓ When measuring/evaluating volunteer events/activities, CR/volunteer managers should consider conducting *post-event wrap-ups or evaluations* for all events and activities and sharing this information with senior management.
- ✓ Managers from companies that solicit employee and community feedback consider their programs more successful than the programs of their peers whose companies do not solicit employee and/or community feedback.
- ✓ Sharing employee feedback with senior management not only impacts the success of volunteer programs in the eyes of most CR/volunteer managers, but 41% of senior executives want managers to provide this information and 10% base the success of their programs, in part, on employee feedback.
- ✓ Sharing community feedback with senior management may not impact success in the eyes of many CR/volunteer managers, but 21% of senior executives want managers to provide this information and 10% base the success of their volunteer programs on it.
- ✓ In addition to soliciting employee and community feedback, 14% of senior executives also want to know what other companies are doing in terms of volunteerism, and would like CR/volunteer managers to regularly benchmark their companies' volunteer programs against those of their peers and competitors.

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW ABOUT EMPLOYEE PARTICIPATION

- ✓ The overwhelming majority of respondents, both managers (88%) and executives (66%) alike, base the success of their volunteer programs on the level of employee participation.
- ✓ Although managers may feel they are doing a good job tracking employee participation, 50% of managers have no idea how many, or how often, employees volunteer. As such, roughly 40% of managers, in all likelihood, have no idea how successful their volunteer programs truly are.
- ✓ Based on the research, it appears as though senior management believes employee participation rates are higher than they really are and that volunteer programs are more successful than they really are. Given the importance senior executives place on measurement and evaluation, companies need to do a much better job at accurately tracking employee participation and sharing the information with senior management.
- ✓ Managers should focus on tracking employee participation in company-sponsored events, especially the names of the individual employees that participate. Without tracking each employee individually, companies will never know the true level of employee participation.

- ✓ ***To successfully recruit employees to participate/volunteer, managers should utilize a combination of electronic, print and verbal communications tools and tactics.***
- ✓ Although personally asking employees to volunteer has always proven to be an effective means to recruit/motivate employees, given that we live in a digital age, managers, overwhelmingly, consider ***e-mail*** as the most effective recruitment tool.
- ✓ Overall, the more appropriate both managers and executives feel the levels of employee participation are, the more successful they feel their programs are.

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW ABOUT SENIOR MANAGEMENT PARTICIPATION

- ✓ Generating senior management buy-in and support is not only key, but also imperative to the success of corporate volunteer programs!
- ✓ Senior management buy-in and support benefits volunteer programs by:
 - Legitimizing/Validating the mission, purpose and value of the program
 - Helping secure needed resources such as funding and personnel
 - Motivating both employees and managers to volunteer
- ✓ ***The most successful approach or technique for generating senior management support is to get them directly involved in a volunteer project or activity.***
- ✓ ***The more involved executives are, the more successful they feel their companies' volunteer programs are.***
- ✓ To significantly impact the success of corporate volunteer programs, CR/volunteer managers agree that senior management needs to be “Very Involved” in the community:
 - Senior management, in general, needs to participate in more events and take a greater leadership role in planning and promoting community service activities
 - Senior management, in general, needs to “get their hands dirty,” as well as take a more active role recruiting other executives
 - Every senior manager needs to participate in at least one, employee-visible event per year
 - Every senior executive needs to serve on the Board of Directors of at least one non-profit organization in the community
- ✓ Senior executives tend to believe that senior managers are more active and engaged in the community and that management participation is more significant to the overall success of volunteer programs than do CR/volunteer managers.

- ✓ *The more involved executives feel their fellow executives are (senior management), the more successful they feel their overall programs are.*
- ✓ 76% of senior executives, versus 53% of CR/volunteer managers, also feel that senior management's current level of participation is appropriate.

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW ABOUT BOARD SERVICE

- ✓ Promoting non-profit board service as a form of volunteerism can positively impact the success of a volunteer program, especially if:
 - Both employees and management are encouraged to serve on non-profit boards
 - Service on the Boards of Directors of national groups is not discouraged
 - Employees and management serve on the Boards of Directors of non-profits whose missions are strategically-aligned with corporate goals and objectives
 - The company provides training
- ✓ Companies may also experience greater success if:
 - Funding is not automatically made available to employees and/or management who serve on Boards of Directors of non-profit organizations
 - Funding is reserved for participation on strategic boards

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW ABOUT WORK RELEASE AND PAID TIME-OFF POLICIES

- ✓ Overwhelmingly, both CR/volunteer managers and senior executives believe that one of the best ways to recruit employees to volunteer is to allow them to volunteer during the workday:
 - 85% of companies now allow employees to volunteer during the workday
 - 86% of executives support allowing employees to volunteer during the workday
- ✓ Of the companies that allow employees to volunteer during the workday:
 - 98% of companies encourage employees to make arrangements with supervisors
 - 38% of companies encourage employees to take advantage of flex-time policies
 - 35% of companies maintain formal release policies
 - 20% of companies also provide employees with paid time-off to volunteer
- ✓ Managers who feel current work-release policies/practices are appropriate are more than twice as likely to offer their employees paid time-off to volunteer than managers who feel current work-release policies/practices are inappropriate.

- ✓ 45% of all managers believe their companies should provide employees with paid time-off to volunteer during the workday. On average, these managers believe their companies should provide employees with four paid days off per year to volunteer (32.6 hours).
- ✓ 42% of executives feel that their companies should provide employees with paid time-off to volunteer. On average, these executives feel that employees should be provided with at least one paid day per year to volunteer.
- ✓ Regardless whether or not managers and executives believe employees should, or should not, be provided with paid time-off, based on their responses, the benefits of doing so are unclear. On the one hand, managers and executives from companies that provide employees with paid time-off feel this practice significantly impacts the success of their programs. On the other hand, managers from companies that do not provide employees with paid time-off feel that their programs are just as successful as the programs that do provide employees with paid time-off.
- ✓ In the end, the best thing CR/volunteer managers can do in terms of allowing employees to volunteer during the workday is to establish a ***formal volunteer release policy*** that outlines the duties and responsibilities of both employees and their supervisors.

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW ABOUT TRAINING AND INTERNAL COMMUNICATIONS

- ✓ ***Generating and sustaining a high level of employee participation is vital to the success of every corporate volunteer program.***
- ✓ ***Through education, training and active, internal communications, CR/volunteer managers can significantly impact the level of employee participation, as well as the overall success of their programs.***
- ✓ Over the past three years, the number of CR/volunteer managers that actively provide volunteer-related education and training to both employees and management has nearly doubled from 35% to 64%.
- ✓ Managers from companies that provide Education and Training consider it to be “Somewhat Significant” to the overall success of corporate volunteer programs.
- ✓ While all forms of education and training can impact the success of volunteer programs, most companies tend to focus on educating employees on the basics (i.e., where to find volunteer opportunities, how to sign-up, who to contact, etc.). Some also: train management to serve on the Boards of Directors of non-profit organizations; train employees to plan events and recruit co-workers; and educate management on volunteering and the volunteer program.

- ✓ While results will vary from company to company, current research indicates that managers can significantly impact the success of their volunteer programs by not only sharing information with employees, but junior-, senior- and mid-level managers, business partners, the Board of Directors and shareholders.
- ✓ Current research also indicates that the more communications tools/mediums managers utilize to share information with internal audiences, the more successful their programs will be. In particular, a diversified combination of print, electronic and verbal communications works best, especially *e-mails, electronic newsletters, employee publications, corporate intranet sites, mailers, kiosks/information booths* and *new employee orientations*.
- ✓ Lastly, managers and executives both agree that the more information they share with internal audiences, the more successful their volunteer programs will be. In particular, the most important information companies can share with their employees, managers and other internal audiences include: contact information, sign-up/membership information, up-coming company events and, if applicable, information on volunteer award programs, Dollars for Doers programs, paid time-off programs, work-release policies and volunteer mission statements.

WHAT'S IMPORTANT FOR CR/VOLUNTEER MANAGERS TO KNOW ABOUT RECOGNITION

- ✓ *Both executives and managers agree that recognizing employees for their commitments of time and service is significant to the overall success of volunteer programs.*
- ✓ *The more successful a program is, the greater the impact recognition seems to have on success.*
- ✓ If CR/volunteer managers are looking to improve their overall volunteer programs, or simply better recognize volunteers, they should consider:
 - Recognizing managers who volunteer, if they do not already
 - Establishing an Annual Volunteer Award program
 - Implementing a Dollars for Doers program
 - Hosting a Formal Recognition Event on an annual basis
 - Issuing Certificates of Appreciation to outstanding volunteers and coordinators
- ✓ CR/volunteer managers should not be surprised if they get a lot of push-back from senior management when it comes to expanding recognition efforts, as nearly 90% of executives feel current recognition levels are appropriate.
- ✓ However, 97% of senior executives believe their companies should financially support volunteerism and are in favor of implementing Dollars for Doers programs.

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW ABOUT EXTERNAL COMMUNICATIONS

- ✓ Sharing information with external audiences, if managed properly, can help to generate a number of benefits for companies, assist CR/volunteer managers achieve many of their long- and short-term goals and objectives, and significantly impact the overall success of volunteer programs. Sharing information:
 - Builds brand awareness
 - Generates positive visibility for the company
 - Strengthens community relations
 - Enhances the company's image as a "good corporate citizen"
- ✓ While results will vary from company to company, current data indicate that managers impact the success of their companies' volunteer programs the most by sharing information with *Non-profit Partners, Suppliers and Vendors, Customers and Clients*, and *Potential Employees*.
- ✓ Furthermore, while results will vary from company to company, sharing information on *Program Statistics, Up-coming Company Events, Dollars for Doers Programs* and *Volunteer Mission Statements* appear to have the greatest impact on the success of corporate volunteer programs.
- ✓ Unfortunately, according to the research, it is unclear which mediums, if any, are truly effective at communicating information on a company's volunteer program with external audiences.
- ✓ Given that 90% of senior executives support the idea of actively sharing information on their companies' volunteer programs and activities, CR/volunteer managers should not hesitate to try new and innovative approaches to reach external audiences.

INTRODUCTION & METHODOLOGY

INTRODUCTION

In 2001, LBG Associates released *Corporate Volunteerism: Innovative Practices for the 21st Century*. That report was undertaken to identify creative approaches to corporate volunteerism and to counter perceived trends at the time: decreased employee participation in corporate volunteer programs; participation in corporate volunteer programs, overwhelmingly, by the same, small, core group of employees; reduced senior management involvement and mounting resistance by low- and middle-managers; and the increased emphasis to demonstrate the value and business benefits of volunteering through tracking, measurement and evaluation.

The focus of *Corporate Volunteerism: Innovative Practices for the 21st Century* was to provide community relations and volunteer program managers (CR/volunteer managers) the tools necessary to build highly effective corporate volunteer programs. What it did not do was help them determine or calculate whether their volunteer programs were successful, much less to what degree.

Building on the first study, this new one aims to help companies determine how successful their corporate volunteer programs are, and to identify what they should focus on to improve their programs. *Measuring Corporate Volunteerism*, is only one component, albeit the cornerstone,

of a much larger endeavor to help companies measure success. In the fall of 2004, LBG Associates will release the first-ever “*Standards of Excellence*” for corporate volunteer programs – targets and standards all companies should strive to implement in their volunteer programs – and a self-diagnostic tool that will help CR/volunteer managers determine whether or not their programs are meeting those standards, and suggest ways to improve their programs. Additionally, LBG Associates will release a suite of tools that will help companies measure the most common objectives of successful programs.

The specific goals and objectives that have been established for this study, and which are expressed throughout the report, are as follows:

Goal 1: Understanding Why Companies Support and Value Volunteerism

The point of this study is neither to make the business case for volunteerism, nor is it to “sell” companies on the value and benefits of corporate volunteer programs. Rather, one of the goals of this study is to identify what is driving companies’ interests in, and support of, volunteerism. Is it the benefits to the company, the community, the employees or a combination of the three that motivates companies to promote and support volunteerism? In addition to understanding why companies support volunteerism, this study also focuses on the specific benefits which companies feel are derived from having a corporate volunteer program.

In the 2001 *Corporate Volunteerism* report, CR/volunteer program managers acknowledged that one of the “key components” of, and largest obstacles to, a successful volunteer program was senior management. In particular, managers cited differences in opinions and values between employees and executives as the main obstacles to their programs. Therefore, to better understand this divergence, this report not only focuses on why CR/volunteer managers think their companies should support and value volunteerism, but how senior executives view volunteerism, as well. In other words, this report, among other things, compares and contrasts how CR/volunteer managers and corporate executives value volunteerism, and whether the differences, if any, impact volunteer programs.

Furthermore, to measure the accuracy of CR/volunteer managers’ and senior executives’ views on the value and benefit of their volunteer programs in the community, this study also examines non-profit partners’ thoughts and opinions, particularly on how they see corporate volunteer programs benefiting themselves (the non-profits), as well as the community. The report also covers in detail what non-profits feel their corporate partners can do to better support them when it comes to planning, organizing and managing volunteers and volunteer opportunities.

Goal 2: Defining and Predicting Success

The overarching goal of this study is to help companies determine whether or not they have a successful volunteer program. In order to achieve this, there are key questions that need to be addressed, which are covered in this study:

1. *How successful do CR/managers and their senior executives currently view their volunteer programs;*
2. *How are they defining “success;” and*
3. *How well do managers’ views align or fit with their definitions for success – what are the “predicators of success.”*

Given the limited resources that CR/volunteer managers have at their disposal, both in terms of time and money, knowing which issues and components are most likely to result in a successful program (i.e., the “predicators of success”) should prove extremely beneficial to CR/volunteer managers because it will allow them to focus on the most critical activities.

Equally important to CR/volunteer managers, based on the findings from *Corporate Volunteerism: Innovative Practices for the 21st Century*, is how senior management views success. As such, *Measuring Corporate Volunteerism* presents information on how successful senior executives feel their volunteer programs are, how they are defining success, and, what they believe are the “indicators of success.”

Goal 3: Identifying The “Key Components” of a Successful Program and How they Impact Success

As part of the 2001 study, CR/volunteer managers were asked to identify the “key components” of a successful corporate volunteer program. In 2004, through this research, LBG Associates revisits these and other “key components,” and takes the analysis to the next level. Not only does this report identify what CR/volunteers feel they need to do in order to have a successful volunteer program, but what impact/affect those actions have on the success of their programs. Concurrently, this study also presents senior executives’ views on the “key components,” as well as the views of the non-profit organizations to which the CR/volunteer managers turn to help plan and organize volunteer events and activities.

METHODOLOGY

The findings and recommendations of this report are based primarily on original data generated from telephone interviews with CR/volunteer managers (e.g. directors, managers, program managers, etc.) and senior executives (e.g. SVP, COO, EVP, VP’s, etc.) from major U.S. companies and corporations, as well as representatives from non-profit organizations located throughout the United States. Secondary data were also gathered through a literature review of related academic research.

Over a five month period – from February 2004 to June 2004 – CR/volunteer managers from 47 U.S. companies and corporations participated in telephone interviews. Participants were provided copies of the questionnaire used during the interviews at least one month in advance.

On average, interviews lasted 70 minutes, but ran between 30 and 120 minutes. Each person that participated in a phone interview was responsible for managing his or her company's corporate volunteer program. Furthermore, from mid-April 2004 to July 2004, extensive follow-up communications were done via e-mails and telephone calls with each corporate participant for the purpose of clarifying and/or elaborating on his or her original responses.

Over a four month period – from mid-February 2004 to mid-June 2004 – senior executives from 29 U.S. companies and corporations participated in telephone interviews (denoted by an asterisk below). Executives were provided copies of the questionnaire used during the interviews at least one month in advance. On average, interviews lasted 30 minutes, but ran between 20 and 50 minutes. Furthermore, from mid-April 2004 to July 2004, extensive follow-up communications were done via e-mails and telephone calls for the purpose of clarifying and/or elaborating on his or her original responses.

CORPORATE PARTICIPANTS

Advanced Micro Devices, Inc.*	John Hancock Financial Services, Inc.*
Agilent Technologies, Inc.	KPMG LLP
Alabama Power*	Mitsubishi Electric U.S.*
Altria Group, Inc.*	Moody's Corporation*
American Express Company*	Neutrogena Corporation*
AT&T Corporation*	Nicor, Inc.
BellSouth Corporation*	Nike, Inc.
The Boeing Company*	Northrop Grumman Corporation
Cisco Systems, Inc.*	Prudential Financial, Inc.
Citigroup, Inc.	SBC Communications, Inc.*
CNL Financial Group, Inc.*	The Charles Schwab Company*
Dell, Inc.	The Scotts Company
Deloitte & Touche LLP*	Sempra Energy
The Walt Disney Company	Sprint Corporation*
Edison International	Starbucks Corporation
Federated Department Stores, Inc.*	Target Corporation*
Fluor Corporation*	The Timberland Company*
FPL Group, Inc.	TXU Energy
General Electric Company*	UST, Inc.*
General Mills, Inc.*	Verizon Communications, Inc.*
IBM Company*	Wal-Mart Stores, Inc.*
Intel Corporation	Washington Mutual, Inc.
International Paper Company*	Xcel Energy, Inc.*
J.P. Morgan Chase & Company	

* Denotes companies who provided a senior executive to interview for the study

According to Hoovers On-Line, Inc. (www.hoovers.com), these companies employed approximately 4.9M workers and had a combined positive net income of \$123 billion for 2003. The size of these companies ranged from 800 – 1.5 million workers, with the median workforce being 46,000. While 2003 net incomes ranged from -\$2.1 to +\$17.9M, the median positive net income was \$931.3M

LBG Associates is extremely grateful to the CR/volunteer managers and senior executives who were willing to participate in this study.

Over a four month period – from mid-February 2004 to mid-June 2004 – representatives from 39 non-profit organizations participated in telephone interviews (38%) or completed and returned extensive questionnaires (62%). Non-profit organizations were selected based on the recommendations of CR/volunteer managers; each was asked to provide the names and contact information for two organizations. Non-profit representatives were provided copies of the questionnaire used during the interviews approximately one month in advance. On average, interviews lasted 50 minutes, but ran anywhere between 30 and 90 minutes. Each non-profit representative was directly involved in managing or overseeing their organization's volunteer activities.

LBG Associates is equally grateful to the non-profits for their willingness to participate in this study.

NON-PROFIT PARTICIPANTS

American Cancer Society Denver (CO)	Metro Atlanta Corp. Volunteer Council (GA)
Big Brothers Big Sisters of E. Missouri (MO)	Oregon Food Bank (OR)
Cabrini Green Tutoring Program (IL)	Philadelphia Cares (PA)
Capital Area Food Bank (TX)	Project Open Hand (CA)
City Harvest (NY)	Protestant Community Centers, Inc. (NJ)
Community Resource Network (IL)	Resource Area For Teachers (RAFT) (CA)
East Elementary School (OH)	Raphael House (CA)
Frontline Outreach (FL)	Solid Waste Authority (FL)
Greater Minneapolis Crisis Nursery (MN)	Stamford Public Schools (CT)
Greater Twin Cities Big Brothers Big Sisters (MN)	Sunnyvale Community Services (CA)
Habitat for Humanity International (GA)	Talking Book & Braille Library (WA)
Habitat of Greater Bridgeport (CT)	Texas Trees Foundation (TX)
Hands on Portland (OR)	The Early Learning Institute (PA)
Harvesters Community Food Network (MO)	The HOPE Program (NY)
Heart of America United Way (MO)	The Leukemia and Lymphoma Society (NY)
Hillview Acres Children's Home (CA)	United Way of the Twin Cities (MN)
Junior Achievement of Orlando (FL)	United Way of Miami-Dade County (FL)
L.A. Works (CA)	United Way of SE Pennsylvania (PA)
La Casa de San Gabriel Community Ctr. (CA)	YMCA at Cooper School (WA)
	Youth Care Minnesota (MN)

These 39 organizations employed approximately 2,492 full-time equivalents (FTEs), two of which employed nearly half (1,165). While staffs ranged between 1 – 675 FTEs, the average staff size for these non-profits (minus the two largest) was 35.6 FTEs. The median staff size was 18 FTEs.

The operating budgets for these groups ranged between \$75,000 and \$170M. Minus the largest group – The Leukemia and Lymphoma Society, which has a \$170M operating budget – operating budgets averaged \$2.974 M, with the median budget being \$1.777M.

CHAPTER 1:

VALUING VOLUNTEERISM

INTRODUCTION

When individuals volunteer – whether it’s at their child’s school, their church or synagogue, a local food bank, a Habitat build or on a non-profit board – they do so, typically, because they have a personal interest in the success of the activity or organization. They also derive a certain level of personal joy and satisfaction from volunteering; more to the point, individuals enjoy participating in volunteer projects because doing so makes them feel good.

With regard to corporate volunteerism, although employees may have a personal interest in the activity or organization they are helping and, as individuals, may feel good about their efforts, companies establish and maintain volunteer programs because they have certain goals and objectives in mind. In short, the business case states that companies encourage, promote and support community service because doing so generates certain benefits for the company, its employees and the communities in which they operate.

But is the business case true? Do companies actually see any benefit(s) in having a volunteer program? And if companies do value volunteerism, are they placing a greater emphasis on how their programs benefit their communities, their employees or themselves? The goals, therefore, of this chapter are three-fold:

1. To explain why companies value volunteerism
2. To identify how volunteer programs benefit companies, employees and communities
3. To compare and contrast the views of companies with those of their non-profit partners

Furthermore, to help address CR/volunteer managers' concerns that senior management is one of the greatest challenges to the success of their programs, the views and opinions of managers and those of senior executives will be presented separately.

WHY COMPANIES VALUE VOLUNTEERISM

During the course of the research, CR/volunteer managers and senior executives were both asked, *"Why does your company support volunteerism?"* Overall, CR/volunteer managers provided 17 unique explanations why their companies support volunteerism, while executives provided 15. On average, individual managers identified three primary reasons why their companies value volunteerism, while senior executives typically had two. Interestingly, one-out-of-four executives provided just a single reason why their companies support volunteerism.

The following represent the primary reasons why companies encourage, promote and support volunteerism, according to CR/volunteer managers:

WHY COMPANIES SUPPORT VOLUNTEERISM – MANAGERS

1. It's Part of Being a Good Corporate Citizen (47%)
2. It's Part of the Corporate Culture (38%)
3. Generates Various Employee Benefits (32%)
4. It's "The Right Thing To Do" (28%)
 - Generates Various Corporate Benefits (28%)
6. Supports Employees' Interests/Strengthens Employee Relations (21%)
7. Enhances Community Relations (19%)
 - Our Employees Expect Us To (19%)
 - Our Communities Expect Us To (19%)
10. Helps Communities Become Better Places to Live & Work (17%)
11. Enhances Company's Image as a Good Corporate Citizen (15%)
12. Leverages Corporate Contributions (13%)
 - Generates Various Community Benefits (13%)

(%) denotes the percentage of participants that provided this response

In addition to the primary benefits listed above, CR/volunteer managers, albeit less than ten percent, also feel their companies value volunteerism because:

- Volunteerism puts a face on community relations activities
- Their peers and competitors volunteer
- Volunteerism is mandated by senior management
- Customers and shareholders expect them to

“IBM sees benefits to the individual, to the community and to the company. It provides employees with opportunities to grow their skills, connect with the IBM team and to feel good about contributing to their communities. The community will benefit from the skills, expertise and leading edge technology and know how that will be applied by IBMers to assist in solving their problems. The company will benefit from enhancing its corporate citizenship and image, and increased visibility of the IBM brand and our ‘On Demand Technology’ approach that is being employed to support volunteerism.”

Diane Melley
On Demand Community Project Director
IBM Corporation

The following represent the primary reasons why senior executives believe their companies encourage, promote and support volunteerism and volunteer programs:

WHY COMPANIES SUPPORT VOLUNTEERISM – EXECUTIVES

1. It’s Part of Being a Good Corporate Citizen (59%)
2. It’s Part of the Corporate Culture (48%)
3. It’s “The Right Thing to Do” (21%)
4. Supports Employees’ Interests/Strengthens Employee Relations (17%)
Generates Various Corporate Benefits (17%)
6. Promotes Teamwork/Teambuilding (15%)
Generates Various Employee Benefits (15%)
8. Helps Communities Become Better Places to Live & Work (10%)

(%) denotes the percentage of participants that provided this response

In addition to the primary reasons listed above, less than ten percent of senior executives also believe their companies value volunteerism because:

- Their employees expect them to
- Their communities expect them to
- Their customers and shareholders expect them to
- Volunteerism helps leverage contributions and community relations activities

“Supporting volunteerism is one of the ways that we help the Company and our employees live up to the Company’s value of: ‘Being good citizens in the communities where we live and work.’ At this point, our employees expect it of us, and our communities expect it of us, as they do most major companies. I would go a bit further and say that in the case of American Express, I believe that part of the identification that the general public has with our brand is the service ethic, which includes high quality customer service and service to the community. We hear that all the time from customers and clients, and I believe it is something that our employees are quite proud of.”

Mary Beth Salerno
President
American Express Foundation

Far and away, CR/volunteer managers and senior executives support volunteerism because ***It’s Part of Being a Good Corporate Citizen***. Nearly sixty percent of executives (59%) and fifty percent of managers (47%) believe that if companies are truly committed to giving back to the community, then they have no other choice but to support volunteer programs.

Both CR/volunteer managers and senior executives also see volunteerism as an integral ***Part of Their Corporate Cultures***. Nearly fifty percent of executives (48%) and forty percent of managers (38%) see volunteerism as a distinguishing characteristic of who they are, as a company, are. For some, volunteerism helps set their companies apart from the competition. As one executive put it:

“The Dayton family that founded our Corporation has always had a tradition of giving back to the community. Team members understand that supporting this tradition is a part of what’s expected of them when they come to work for Target. Team members know that they are working for a company that is interested in making a difference in, not just profiting from, our communities. It follows, then, that a team member’s involvement in corporate volunteerism would come naturally . . . it would be a part of their DNA.”

John Griffith
SVP, Property Development
Target Corporation

Managers and executives also believe that there are a number of inherent ***Employee and Corporate Benefits*** garnished through volunteerism. One-in-three managers (32%) and one-in-six executives (15%) value volunteerism for its ability to enhance employees’ skills and leadership abilities, as well as impact employee pride, morale and happiness, while 28% percent of managers and 17% percent of executives value volunteerism for its ability to impact employee

recruitment and retention, customer relations, brand recognition, sales, marketshare, etc. Fourteen percent of CR/volunteer managers (14%) also feel that their companies should support volunteerism due to the inherent **Community Benefits** (e.g., awareness, financial support, manpower, etc.).

At Sprint, volunteerism is a strategic piece of the community relations puzzle; it's part of Sprint's commitment to giving back to the communities in which we live and work; and it serves as a big part of employees' individual development plans (skills and leadership development)."

Thomas Murphy, SVP
Communications & Brand Management
Sprint Corporation

In addition to generating employee benefits, a significant number of CR/volunteer managers (21%) and senior executives (17%) also believe that providing support for volunteer programs and initiatives is a great way for their companies to **Support Employees' Interests** and **Strengthen Employee Relations**. In other words, if companies really care about and appreciate their employees, then they should encourage, promote and support the volunteer and community service activities of their employees.

Another popular belief shared by both CR/volunteer managers (17%) and senior executives (10%) is that corporate volunteer programs make **Communities Better Places to Live and Work**. Many of these participants, both managers and executives alike, believe that when communities become better places to live and work, companies benefit as a result. Such benefits include: workforce development, better educated consumers, stable work environments, etc.

Two-out-of-five managers also believe their companies encourage, promote and support volunteerism because **Employees and Communities Expect Them To**. Whether it is because they are the ones usually giving the orders, or that they simply did not think of it at the time of their interviews, less than ten percent of senior executives feel that their companies support volunteerism irrespective of the expectations of internal or external stakeholders.

"Volunteerism is a natural extension of our philanthropic relationships with non-profits while also providing employees with opportunities to get involved in their communities – something they have expressed a strong desire to do."

Margot Cochran
Manager, Employee Programs
Altria Group, Inc.

WHAT'S INTERESTING TO KNOW...

While on the surface it appears that CR/volunteer managers and senior executives value volunteerism for similar reasons, a further analysis of the data reveal a number of interesting *differences*.

When the independent responses of managers and executives are sorted and grouped into like categories, namely by who benefits as a result from corporate volunteerism (the company, the community or the employees), the following dynamic occurs:

**WHY COMPANIES SUPPORT VOLUNTEERISM:
EXECUTIVES VS. MANAGERS**

Senior Executive Responses

43% Community-Related Benefits
31% Company-Related Benefits
25% Employee-Related Benefits

CR/Volunteer Manager Responses

43% Company-Related Benefits
34% Community-Related Benefits
23% Employee-Related Benefits

Based on the responses given, the research shows that *senior executives feel that the community is most likely to benefit from volunteering*, while *CR/volunteer feel that the company is most likely to benefit from volunteering*. Both groups, however, *believe that employees benefit least from volunteering*. This dynamic can probably explain a portion of the dilemma CR/volunteer managers face in generating greater buy-in and support from senior management for their volunteer programs. Note: for the purposes of this comparison “The Right Thing to Do” and “Part of Being a Good Corporate Citizen” responses are considered as community-related benefits.

When the independent responses of managers and executives are sorted and grouped into like categories, the research also shows that:

- ✓ 55% of senior executives and 40% of CR/volunteer managers do not place any emphasis on how corporate volunteer programs benefit employees
- ✓ 34% of senior executives and 15% of CR/volunteer managers do not place any emphasis on how corporate volunteer programs benefit communities
- ✓ 21% of senior executives and 15% of CR/volunteer managers do not place any emphasis on how corporate volunteer programs benefit their companies

Lastly, while the topic of evaluating success will be addressed in the next section:

- ✓ CR/volunteer managers feel their volunteer programs are equally “Successful” regardless of why their companies choose to support volunteerism

HOW VOLUNTEERISM BENEFITS COMPANIES AND EMPLOYEES

The business case to support volunteerism states that volunteer programs generate benefits for the companies, their employees and their communities. By supporting volunteerism, it has been argued that companies can project images as “good corporate citizens” and strengthen their ties with the communities and their respective leaders. Volunteerism may also impact employee pride and morale, and help companies to recruit and retain a highly qualified workforce. It also can increase brand recognition and subsequent sales, secure and protect long-term interests, and generate positive economic benefits for companies.

As for employees, it is widely cited that volunteerism provides skills enhancement and energizes employees. It teaches them how to handle multiple tasks, as well as how to work in a team setting. It also helps develop and refine skills in conflict resolution, decision-making, communications and financial management, while at the same time reducing stress – all at little cost to the company!

The focus of this section is to test these past assumptions of volunteerism.

During the course of the research, CR/volunteer managers and senior executives were both asked to, *“Please identify the top five benefits volunteerism generates for the company and/or employees.”* At no time were participants limited to the number of responses they could provide.

Overall, CR/volunteer managers identified 24 unique corporate and/or employee benefits of volunteerism, while senior executives identified 18 individual benefits. On average, managers feel that there are six ways in which volunteerism benefits their companies and employees, although their responses may range from as few as two to as many as eleven. Senior executives, for the most part, feel that there are five corporate/employee benefits as a result of volunteerism, but even their views may vary from as few as two to as many as eight.

Interestingly:

- ✓ 38% of executives identified no more than four corporate/employee benefits
- ✓ 10% of executives identified no more than three corporate/employee benefits

The following represent the primary benefits of volunteerism according to the CR/volunteer managers:

CORPORATE AND EMPLOYEE BENEFITS OF VOLUNTEERISM – MANAGERS

1. Enhances Company's Image as a Good Corporate Citizen (83%)
2. Boosts Employee Morale/Creates Positive Work Environment (77%)
3. Elevates Employee Pride (53%)
Develops Employees' Business and Leadership Skills (53%)
5. Promotes Teamwork (49%)
6. Builds Brand Awareness/Generates Good PR for the Company (47%)
7. Positively Impacts Employee Recruitment (32%)
8. Positively Impacts Worker Retention (28%)
9. Enhances External/Community Relations (26%)
10. Leverages Corporate Contributions (17%)
Externally Promotes Corporate Culture and Values (17%)
12. Creates Healthier Communities Resulting in Healthier Business Environments (13%)
Broadens Employees' Diversity Awareness (13%)
Provides for Greater Work/Life Balance (13%)
15. Enhances Company's Image as an Employer of Choice (11%)

(%) denote the percentage of participants that provided this response

"Our ethic of service, and indeed our CSR platform as a whole, acts as a magnet that attracts and screens talent. More and more employees are saying they came to Timberland in part because of our strong culture of doing good in the community. Employees have many opportunities to leverage leadership positions in service initiatives to get to know a broader constellation of people at all levels of the company and to chisel leadership muscles they already have but perhaps might not have occasion to showcase. This breaks the bureaucratic hierarchy down and allows for a fluidity of interpersonal connection in our community. It also allows for the kind of informal networking that makes it easier for managers to appreciate different attributes in their employees and for employees in return to see more sides to the personalities of people who might manage them on a day to day basis."

Patrick Kirby
Service Manager, Social Enterprise
The Timberland Company

In addition to the primary benefits listed above, less than ten percent of CR/volunteer managers also see corporate volunteer programs as effective means to:

- Provide greater networking opportunities
- Improve government relations
- Generate buy-in and support from senior management
- Enhance customer relations
- Enhance investor relations
- Stimulate workforce development
- Recruit/retain senior executives

The following represent what senior executives see as the primary benefits which corporate volunteerism generates for their companies and employees:

CORPORATE AND EMPLOYEE BENEFITS OF VOLUNTEERISM – EXECUTIVES

1. Enhances Company's Image as a Good Corporate Citizen (72%)
2. Elevates Employee Pride/Positively Impacts Worker Retention (45%)
3. Develops Employees' Leadership Skills (38%)
 - Develops Employees' Business Skills (38%)
 - Builds Brand Awareness (38%)
 - Boosts Employee Morale/Creates a Positive Work Environment (38%)
7. Bolsters Employees' Level of Civic Pride, Awareness & Activism (34%)
8. Positively Impacts Employee Recruitment (31%)
 - Promotes Teamwork (31%)
10. Generates Good PR for the Company (21%)
 - Creates Healthier Communities Resulting in Healthier Business Environments (21%)
12. Provides for Greater Work/Life Balance (14%)
 - Enhances Customer Relations (14%)
 - Provides Greater Networking Opportunities for Employees (14%)

(%) denote the percentage of participants that provided this response

Less than ten percent of senior executives also feel corporate volunteerism: helps secure a company's license to operate; leverages corporate contributions; externally promotes the corporate culture and values; and enhances the company's image as an employer of choice.

Based on the research:

CR/volunteer managers and senior executives overwhelmingly agree on the benefits volunteer programs and initiatives generate for their companies and employees.

“Supporting and maintaining a corporate volunteer program enhances associate pride in working for CNL – it sends a strong message to employees that we are committed to giving back to the communities in which we live and work; it show’s we’re ‘walking the talk.’ Supporting volunteerism also enhances associate morale. Volunteerism helps educate employees on community issues and needs, and provides a way for them to get involved and give back. It enhances the Company’s image as an ‘Employer of Choice’ and allows us to more effectively recruit a highly talented workforce. Lastly, volunteerism enhances our brand recognition and CNL’s overall reputation as a good corporate citizen.”

Kelley Mossburg
Chief Operating Officer
CNL Holdings, Inc.

Boosting Employee Morale. Both CR/volunteer managers and senior executives agree that by supporting volunteerism, their companies can positively impact employee morale and create a happier, more productive work environment. However, managers (77%) are twice as likely then senior executives (38%) to see **Employee Morale** as a benefit.

“The greatest benefit generated by our volunteer program is that it has a positive impact on employee morale and satisfaction. Through volunteering, employees come away with a true belief that they can make a difference and are appreciative of the company for providing the opportunity to get involved.”

Carla Robertson
Director, Volunteer & Education Services
Alabama Power

Developing Business and Leadership Skills: CR/volunteer managers and senior executives also agree that volunteerism enhances employees’ business and leadership skills. The difference here is that managers acknowledge these benefits in tandem with one another, while executives tend to view them separately, reporting one, but not necessarily the other.

Elevating Employee Pride and Impacting Worker Retention. Both CR/volunteer managers and senior executives also believe volunteerism positively impacts employee pride and helps companies retain valued workers. However, managers commonly view **Employee Pride** and **Worker Retention** as two separate benefits, whereas executives describe the two as one causal relationship. Senior executives tend to see volunteerism directly impacting employee pride, which, in turn, impacts worker retention.

“Maintaining a volunteer program generates a number of invaluable benefits for Altria. People today want to work for a company that is a responsible corporate citizen and volunteerism brings that spirit to life. Volunteering also introduces employees to new worlds, new ideas and new experiences outside of the corporate norm. Volunteering in groups promotes teambuilding and allows employees to meet and interact with peers from other parts of Altria which they wouldn’t normally have the opportunity to do during the regular workday. Last, but certainly not least, making a difference through volunteer activities helps build morale.”

Ken Murphy, SVP
Human Resources & Administration
Altria Group, Inc.

Building Brand Awareness and Generating Good PR: Both managers and executives also feel that volunteerism is able to **Build Brand Awareness** and **Generate Good PR** for their companies by showcasing the skills, talents and expertise of employees while they assist non-profits and tackle vital community needs. Paralleling the previous benefits, senior executives also view **Brand Awareness** and **Good Public Relations** as separate corporate benefits, reporting one, but not necessarily the other, whereas CR/volunteer managers tend to link them.

“Volunteerism enhances Deloitte’s image in the community as a good corporate citizen. It fosters internal and external networking. It allows for employee skills development and teambuilding. Volunteerism also provides an opportunity for business development – it provides an opportunity for our people to be known in the community, for them to showcase their knowledge, skills and expertise, which, in turn, enhances the Company’s brand and professional reputation.”

Mark Chain, National Director
Recruiting & Human Resource Management
Deloitte & Touche LLP

“By supporting our employees’ service activities, our customers, as well as potential customers, see first-hand our commitment to the communities in which we live and work. This not only helps us to enhance current customer loyalty, but supporting volunteerism also positively influences sales and consumer choice.”

Mary Loeffel
Manager, SBC Pioneers
SBC Communications

Bolstering Civic Pride, Awareness and Activism. One-in-three senior executives (34%) (versus no managers) see volunteerism as a way to educate employees on various community needs and issues, particularly those related to local government, and to motivate them to become more active and involved citizens. In short, the more employees volunteer the more active executives feel they will become in their communities outside of company-sponsored events.

Enhances Employees' Work/Life Balance. In the United States, the age of the 40-hour work week is dead or dying. Employees are expected to work longer hours thus cutting into their "disposable time" – time away from work that is normally spent with family and friends, as well as volunteering. CR/volunteer managers feel formal volunteer programs make it easy (or easier) for employees to get involved, which frees-up or increases the amount of disposable time an employee has to volunteer. In the minds of managers, the less time employees have to spend looking for opportunities, the more time they can spend actually volunteering. Additionally, managers also believe that company-sponsored volunteer opportunities done during the workday positively impact/improve the work/life balance.

Senior executives not only view volunteer programs as means to make it easy/easier for employees to volunteer, but as mechanisms for enhancing the "quality" of volunteers' experiences. By providing dedicated resources, namely a volunteer staff and budget, executives feel more time and attention can be spent working with non-profit partners to ensure events run smoothly and employees end up feeling good about the experience, as well as the company. In short, executives feel that volunteer programs not only provide employees with more time to volunteer, but makes the time they spend volunteering all the more worthwhile.

"Findings from the December 2001 employee survey showed that 60% of employees felt better about General Mills because of our commitment to the community. Six-out-of-ten employees indicated that the company's support of social issues increased their pride in working at General Mills. Knowing that the company supports volunteerism helps to enrich employees' work life and volunteer life. I think our employees are comfortable and proud that they volunteer knowing that the company backs them."

Donna Svendsen
Associate Director, Community Action
General Mills Company

Enhancing the Image as an Employer of Choice. Separate from its impact on *Employee Recruitment* and *Worker Retention*, 11% of CR/volunteer managers also see volunteerism enhancing their companies' images as "employers of choice." In other words, many managers feel that by supporting volunteerism, their companies are able to win the respect and admiration of their peers and competitors, the media and the public at-large, and become known as great places to work. A handful of senior executives, albeit less than ten percent, also feel this way.

Increasing Diversity Awareness. By volunteering in communities with diverse populations, approximately one-in-seven CR/volunteer managers (14%) see volunteerism as a way for employees to learn about and value diversity. Less than ten percent of senior executives also acknowledge *Diversity Awareness* as a company/employee benefit of volunteerism.

“The issue is that we all tend to live in higher income areas and run in circles that may not always reflect our complete consumer base. When our employees are involved in community relations events, they expand their exposure to the larger community. They become more aware of product needs when they better understand community issues, environment and income issues. For instance, the more involvement we have with inner-city poor, the more it helps us to understand that there is a huge market that we are not participating in that is represented by the ‘dollar stores’ (a fast-growth retail trend). It helps us to better understand that expensive packaging used unnecessarily only serves to drive up the price of the product, putting it out of reach for many potential consumers. It also helps us to understand that a leading skin care company must address multi-cultural needs in a more holistic way.”

David Jennings
Vice President, Human Resources
Neutrogena Corporation

WHAT’S INTERESTING TO KNOW...

Based on the research:

- ✓ In general, the larger the company (number of employees), the more frequently CR/volunteer managers see the following as corporate and/or employee benefits:
 - ***Teamwork***
 - ***Worker Retention***
 - ***Employee Recruitment***
 - ***Brand Awareness***
- ✓ In general, the smaller the company, the more frequently CR/volunteer managers see volunteerism positively impacting ***External Relations*** (e.g. community, government, customer and investor relations)

Although the concept of evaluating success will be addressed in the next section:

- ✓ The more successful CR/volunteer managers feel their programs are, the more frequently they see volunteerism ***Enhancing Their Images as Good Corporate Citizens***
- ✓ Managers who feel their programs are not very successful less frequently see volunteerism impacting ***Teamwork, Employee Pride, Worker Retention*** and ***Employee Morale***

HOW CORPORATE VOLUNTEERISM BENEFITS COMMUNITIES

In addition to the benefits for companies and employees, the business case also suggests that corporate volunteer programs generate benefits for the communities where businesses operate. By encouraging, promoting and supporting volunteerism, corporations have the opportunity to share their success and to give something back to the communities.

During the course of the research, CR/volunteer managers and senior executives were both asked: *“Please identify the top five benefits volunteerism generates for the community.”* At no time were participants limited to the number of responses they could provide.

Overall, CR/volunteer managers identified 20 unique benefits which corporate volunteer programs generate for communities, while senior executives identified 16 benefits. On average, both managers and executives identified only four ways in which their volunteer programs benefit their communities, although the number of responses managers provided varied from one to seven, while executives’ varied from two to six. Interestingly:

- ✓ 55% of executives identified no more than three community benefits
- ✓ 17%, or one-in-six executives, identified no more than two community benefits

The following represent the primary ways in which corporate volunteerism impact communities, according to CR/volunteer managers:

COMMUNITY BENEFITS OF CORPORATE VOLUNTEERISM – MANAGERS

1. Supplies Non-Profits with Manpower (55%)
2. Provides Financial Support to Non-Profits via Employee Giving (47%)
3. Raises Awareness for Issues, Needs and Organizations (38%)
4. Supplies Non-Profits with Expertise/Specialized Skills (34%)
 - Provides Financial Support to Non-Profits via Corporate Contributions (34%)
6. Helps Address and Solve Specific Community Needs and Issues (32%)
7. Generates Cost Savings for Non-Profits (28%)
8. Helps Communities Become Better Places to Live and Work (23%)
9. Builds Non-Profit Capacity (17%)
10. Provides Children with Mentors and Role Models (15%)
 - Motivates Others to Get Involved (15%)
12. Provides In-Kind Support to Non-Profits (13%)
13. Legitimizes/Validates Non-Profits’ Missions, Goals and Services (11%)

(%) denote the percentage of participants that provided this response

“Our volunteers help non-profits address specific community needs; the volunteer program helps to build relationships between communities and companies, especially during times of declining government spending; the program promotes an engaged citizenry, it inspires employees and others to get involved in their communities; and through volunteerism, employees have a better sense of the issues/needs affecting their communities.”

Rayna Aylward
Executive Director
Mitsubishi Electric America Foundation

Less than ten percent of CR/volunteer managers also feel that volunteerism can benefit communities by:

- Establishing long-term relationships between companies and non-profits
- Raising the quality of life for non-profits’ clients
- Bridging the gap between businesses and the community
- Assisting non-profits with strategic planning via board service
- Fostering creative problem solving and ‘out-of-the-box’ thinking
- Supplementing workforce development
- Raising academic performance

The following represent the primary benefits which senior executives feel corporate volunteer programs have on the communities in which they live and work:

COMMUNITY BENEFITS OF CORPORATE VOLUNTEERISM – EXECUTIVES

1. Supplies Non-Profits with Manpower (72%)
2. Supplies Non-Profits w/ Expertise/Specialized Skills – Builds Capacity (59%)
3. Provides Financial Support to Non-Profits via Corporate Contributions (41%)
4. Helps Address and Solve Specific Community Needs and Issues (34%)
5. Raises Awareness for Needs, Issues and Organizations (28%)
6. Helps Communities Become Better Places to Live and Work (24%)
7. Provides Financial Support to Non-Profits via Employee Giving (21%)
8. Motivates Others to Get Involved (17%)
- Bridges the Gap Between Businesses and Communities (17%)
10. Generates Cost Savings for Non-Profits (10%)
- Provides In-kind Support to Non-Profits (10%)

(%) denote the percentage of participants that provided this response

“Promoting and supporting volunteerism benefits the communities where we operate. First, the efforts and energy of our volunteers often motivate others, particularly other companies, to get involved in the community. Second, organizing volunteer events and activities, especially through our Cares Day, provides non-profits with a ton of manpower to accomplish a multitude of tasks. Corporate dollars often follow the footsteps of our employees and our program often prompts employees to continue to volunteer with non-profit groups outside of corporate-sponsored events.”

Ken Murphy, SVP
Human Resources & Administration
Altria Group, Inc.

Less than ten percent of senior executives also see their volunteer programs benefiting their communities by:

- Providing high caliber board members
- Establishing long-term relationships between employees and non-profits
- Acting as ‘stop-gaps’ where government funding falls short
- Creating opportunities for friends and family involvement
- Providing non-profits access to resources companies wouldn’t necessarily think of giving

Based on the research:

CR/volunteer managers and senior executives practically see “eye-to-eye” on how corporate volunteer programs benefit the communities in which they live and work.

Supplying Expertise and Building Non-Profit Capacity. Nearly sixty percent of senior executives (58%) and more than one-third of CR/volunteer managers (34%) place a great deal of importance on the vast amounts of knowledge and expertise employees contribute to non-profit organizations in the form of specialized skills (e.g. technical, professional, administrative, etc.). Where executives and managers differ is that executives feel that supplying expertise helps non-profits operate more efficiently and effectively, which, in turn, allows them to build capacity and expand services. Managers, on the other hand, 17% in fact, feel **Capacity Building** is a community benefit onto itself – the cumulative effect of multiple actions, not just **Expertise/Specialized Skills**.

“When Alabama Power Company employees volunteer to serve as board members of non-profit organizations, they provide essential leadership for worthwhile causes in our communities. It has been my experience that few companies have employees equally skilled to Alabama Power Company employees in facilitating meetings, encouraging collaboration and cooperation, valuing diversity and achieving results. No company even stands in our shadow when it comes to providing leadership for non-profit organizations. This leadership helps make the communities a better place to live, work, raise a family and operate a business. And having quality communities in our service territory ultimately translates into increased business opportunities for the company.”

Terry Waters
Vice President
Alabama Power Western Division

Legitimizing/Validating Non-Profits’ Missions, Goals and Services. While a considerable number of CR/volunteer managers (38%) and senior executives (28%) feel that corporate volunteerism does a lot to ***Raise Awareness for Community Needs, Issues and Organizations***, 11% of managers also feel that the efforts and involvement of corporate volunteers legitimizes and validates the work that non-profits do, and lends a sense of credibility to the issues and needs they address. This “elevated status” helps non-profits attract additional corporate partners and secure additional community resources.

“Volunteers provide much needed ‘sweat equity’ that non-profits must have in addition to financial support. In particular, non-profit organizations can tap our structured program – they can count on us – we can provide people 24 hours a day, seven days a week, 365 days a year. Through this influx of ‘free labor,’ non-profit organizations can conserve resources which would be otherwise spent to address the work/projects done by volunteers. Furthermore, through our support, we bring attention and awareness to the organizations we partner with, the issues they address and the clients they serve.”

Gloria Delgado
Vice President
SBC Pioneers

Bridging the Gap Between Businesses and Communities. A portion of executives (17%) feel that the general public tends to distrust and question the motives of corporate America, often due to a lack of knowledge and understanding. As such, these executives see volunteerism as an effective means to uncover this vale of ignorance, educate the public on their goals and operations, and ultimately strengthen the ties/relations between their companies and communities in which they operate. Less than ten percent of managers feel this way.

WHAT'S INTERESTING TO KNOW...

While the views of CR/volunteer managers and senior executives on the community benefits of volunteerism are closely related, a further exploration of the data highlight a few interesting dynamics. In particular, when individual responses from managers and executives are sorted and grouped into like categories, namely by the type/form of community benefit, the following priorities or valuations of community benefits can be seen:

**PRIORITIZING COMMUNITY BENEFITS OF VOLUNTEERISM:
EXECUTIVES VS. MANAGERS**

Senior Executives

27% "Manpower/Sweat Equity"
25% "Financial and In-kind Resources"
18% "Knowledge and Expertise"
16% "Quality of Life"
14% "Relationship Building"

CR/Volunteer Managers

30% "Financial and In-kind Resources"
21% "Quality of Life"
18% "Manpower/Sweat Equity"
17% "Relationship Building"
14% "Knowledge/Expertise"

As the above statistics demonstrate:

- ✓ Senior executives view the ***Manpower/Sweat Equity*** provided by volunteers and the ***Financial and In-kind Resources*** generated through corporate and employee giving as the most significant by-products/community benefits of their volunteer programs
- ✓ In contrast, senior executives view the ***Knowledge and Expertise*** contributed through volunteering (which includes board service), the enhanced ***Quality of Life*** enjoyed by communities, employees and clients; and the ***Relationships*** that are developed and/or enhanced between companies, communities and employees, as the least significant by-products/benefits of their volunteer programs
- ✓ CR/volunteer managers overwhelmingly see the ***Financial and In-kind Resources*** generated through corporate and employee giving as the most significant by-products/community benefits of corporate volunteerism, and ***Knowledge and Expertise*** as the least significant benefit

Additionally, the research also shows:

- ✓ CR/volunteer managers from companies of all sizes see ***Manpower, Awareness*** and ***Addressing Specific Community Needs*** as community benefits
- ✓ The smaller the company (number of employees), the more frequently managers see ***Cost Savings*** and ***Corporate Contributions*** as community benefits
- ✓ Managers from companies with fewer than 11,500 employees do not see ***Employee Giving*** and ***Expertise/Specialized Skills*** as community benefits

THE NON-PROFIT PERSPECTIVE

In LBG Associates' 2001 study, *Corporate Volunteerism: Innovative Practices for the 21st Century*, CR/volunteer managers identified senior management as one of the largest obstacles to their programs. Managers seemed to feel that they and their executives did not necessarily see “eye-to-eye” on the value, benefits and impact of corporate volunteerism. But what about their non-profit partners? Do companies and non-profits necessarily see eye-to-eye on volunteerism? Are corporate volunteer programs providing the resources and addressing the issues that non-profits need or even want? The purpose of this section, therefore, is to examine whether or not companies and non-profits are “on the same page” when it comes to volunteerism. Specifically, this section highlights non-profits' views on how corporate volunteer programs benefit themselves and overall communities, and compares/contrasts non-profit views with those expressed earlier by CR/volunteer managers and senior executives.

During the course of the research, non-profit representatives were asked to, “*Please identify the top five benefits corporate volunteerism generates specifically for your organization.*” At no time were participants limited to the number of responses they could provide.

Overall, non-profit participants identified 21 unique direct benefits their organizations enjoy as a result of corporate volunteer programs. On average, non-profit participants identified five direct benefits, although the number of responses/benefits ranged from one to seven. The following represent the primary benefits non-profits enjoy as a result of corporate volunteerism:

DIRECT BENEFITS OF CORPORATE VOLUNTEERISM TO NON-PROFITS

1. Provides Financial Support to Non-Profits via Corporate Contributions (54%)
2. Raises Awareness for Needs, Issues and Organizations (51%)
3. Supplies Non-Profits with Expertise/Specialized Skills (46%)
4. Supplies Non-Profits with Manpower (32%)
 - Opens Doors/Provides Access to Other Community Resources (32%)
6. Provides Financial Support to Non-Profits via Employee Giving (24%)
 - Helps Build Non-Profit Capacity (24%)
 - Elevates the Level of Professionalism/Business Acumen of Volunteers (24%)
9. Provides Dependable/Committed Volunteers (22%)
10. Generates Cost Savings for Non-Profits (19%)
 - Legitimizes/Validates Non-Profits' Missions, Goals and Services (19%)
 - Provides Business Concepts and Rationales to Solve Community Issues (19%)
 - Provides Non-Profits with In-kind Support and Resources (19%)
14. Establishes a Sustainable Volunteer Base for the Long-Term (16%)
15. Supplements Organizational Leadership via Board Service (14%)
 - Provides Children with Mentors and Role Models (14%)

(%) denote the percentage of participants that provided this response

“Corporate volunteer programs provide a large volume of volunteers which not only helps to get more done, but helps cut costs, too. Corporate volunteers also bring a seemingly endless amount of energy and enthusiasm, a greater understanding for how things work, and resources, both financial and in-kind. Corporate volunteers also help open doors to other resources in the community through their relationships and contacts.”

Becky James-Hatter
President & CEO
Big Brothers Big Sisters of East Missouri

In addition to identifying how their organizations directly benefit from corporate volunteerism, non-profit participants were also asked to: *“Please identify the top five benefits corporate volunteerism generates for the community.”* At no time were participants limited to the number of responses they could provide.

Overall, non-profit participants identified 21 unique benefits that corporate volunteer programs generate for communities. On average, non-profit participants feel there are five ways in which corporate volunteer programs benefit their communities, although the number of responses may vary from one to seven. The following represent those benefits:

COMMUNITY BENEFITS OF VOLUNTEERISM – NON-PROFITS

1. Provides Financial Support via Corporate Contributions (58%)
2. Raises Awareness for Issues, Needs & Organizations (50%)
3. Brings Communities Closer Together (42%)
4. Motivates Others to Get Involved (39%)
5. Supplies Non-Profits with Manpower (37%)
6. Helps Address & Solve Specific Community Needs & Issues (26%)
Helps Communities Become Better Places to Live & Work (26%)
8. Builds Non-Profit Capacity (16%)
Supplies Non-Profits with Expertise/Specialized Skills (16%)
Bridges the Gap Between Companies & Communities (16%)
11. Bolsters Civic Pride, Awareness & Activism (13%)
12. Provides Business Concepts & Rationales to Solve Community Issues (11%)

(%) denote the percentage of participants that provided this response

Non-profit participants, albeit less than ten percent, also see corporate volunteerism benefiting overall communities by:

- Reducing stigmas associated with being “in need”
- Providing mentors and role models to clients/children
- Providing financial support via corporate and employee giving
- Promoting goodwill throughout the community
- Improving relations between racial and economic groups

“Corporate volunteer programs encourage citizen leadership. They bring expertise to community organizations. Corporate programs strengthen the overall community by bringing together people who live in an area with those who may only work there. They motivate other companies to increase volunteer efforts through friendly ‘competition.’ And corporate programs help companies better understand the needs of their market.”

Amy Anderson
Manager, Public Engagement
United Way of Southeastern Pennsylvania

In many regards, companies and non-profits agree on the community benefits of corporate volunteerism. In particular, CR/volunteer managers, senior executives and non-profit participants generally all acknowledge that corporate volunteer programs:

- ✓ Generate cost savings for non-profits
- ✓ Help build non-profit capacity
- ✓ Provide non-profits with in-kind support and resources
- ✓ Provide financial support via corporate and employee giving
- ✓ Help address/solve specific community needs and issues
- ✓ Help communities become better places to live and work

However, in many regards, companies and their non-profit partners also view the community benefits of volunteerism quite differently. The following are the most prevalent differences.

Corporate Contributions vs. Manpower. Probably the most visible difference between companies and non-profits is the value they place on financial and human resources. Although all three groups – non-profits, CR/volunteer managers and senior executives – agree that corporate volunteer programs provide communities with much needed financial and human resources, non-profit participants overwhelmingly consider ***Financial Support via Corporate Contributions*** as the most significant by-product/benefit of corporate volunteerism, while managers and executives view ***Manpower*** as the most significant benefit.

In short, based on the research:

It would appear that non-profit organizations appreciate the funds companies and employees contribute as a result of participating in volunteer events/activities, more so than contributions of time and talent.

Bringing Communities Closer Together. One of the greatest benefits non-profits feel corporate volunteer programs have is the ability to bring communities closer together. Forty-two percent of non-profit participants see corporate volunteerism as a means to cross social, economic, racial, religious and ethnic barriers and unite entire communities. Neither CR/volunteer managers nor senior executives acknowledge this as a way in which their volunteer programs benefit communities.

“Corporate volunteer programs build a stronger sense of community – it conveys a feeling that ‘we’re all in this together.’ They triple the number of available people to address community needs. They bring additional financial resources to community challenges. And corporate volunteer programs help inspire others to get involved.”

Cathy Guinta
Executive Director
Stamford Public Education Foundation

Generating Awareness vs. Supplying Expertise. Another striking difference between companies and non-profits are their views on the awareness corporate volunteer programs generate for community needs, issues and organizations, and the expertise/specialized skills volunteers contribute which, among other things, help solve those needs and issues. Fifty percent of non-profit participants see *Awareness for Needs, Issues and Organizations* as one of the most significant benefits which they, and other groups throughout the community, enjoy as a result of corporate volunteer programs. In contrast, only slightly more than one-in-three managers (38%) and one-in-four executives (28%) agree. On the other hand, 59% of senior executives and 34% of CR/volunteer managers place a significant emphasis on the *Expertise/Specialized Skills* that their employees contribute as a community benefit, whereas less than one-in-seven non-profit participants (16%) agree. Interestingly, however, 46% of non-profit participants see *Expertise/Specialized Skills* as a benefit to their organizations, but not as a benefit to the overall community.

Bolstering Civic Pride, Awareness and Activism. Although one-third of executives feel that their employees' own levels of civic pride, awareness and activism are heightened as a result of corporate volunteerism, neither they, nor the CR/volunteer managers, felt the community's overall level of civic pride, awareness and/or activism was impacted by their programs. Thirteen percent of non-profits, however, see corporate volunteerism directly impacting people's pride in their communities, educating them on key civic/social issues and motivating the populous to become more active citizens.

Business Concepts and Rationales Used to Solve Community Issues. Both non-profit organizations (26%) and corporations (managers – 32% / executives – 34%) see corporate volunteer programs as a way to help address and solve specific community needs and issues. For example, volunteering with food banks helps combat hunger; volunteering with Habitat for Humanity helps combat homelessness; and volunteering as mentors/tutors helps combat illiteracy, poor academic performance, delinquency and juvenile crime. However, where non-profits and companies differ is that non-profit participants feel that corporate volunteer programs not only address/solve key community needs and issues, but do so through the utilization of sound business concepts and rationale, as well as “out-of-the-box” thinking – ways which companies and corporate volunteers can only provide.

Motivating Others vs. Supplying Manpower. This is also one of the more notable differences between how companies and non-profits view corporate volunteerism. As noted previously, CR/volunteer managers (55%) and senior executives (72%) overwhelmingly see ***Supplying Non-Profits with Manpower*** as the number one community benefit of their volunteer programs, and ***Motivating Others to Get Involved*** as a much less significant benefit (15% and 17% respectively). In contrast, more non-profits, on average, consider corporate volunteer programs' abilities to motivate others to volunteer as a greater benefit than the manpower the programs actually provide.

Opening Doors/Providing Access to Other Community Resources. In addition to ***Motivating Others to Get Involved***, 32% of non-profits also see corporate volunteer programs benefiting their organizations, as well as others, by connecting them with other groups in the community, particularly other companies. In short, non-profits not only see corporate volunteer programs as a way to goad others to volunteer, but as an effective means to secure additional in-kind and financial resources, particularly from other companies.

“Corporate volunteers simply help us get more accomplished. They help defray costs, provide invaluable expertise and are our best spokespersons – they generate greater awareness and exposure for us in the community. Corporate volunteers also help open doors and facilitate access and relationships with other companies and community leaders.”

Susan Anderson
Director, Caring Connection
Greater Twin Cities United Way

WHAT SETS CORPORATE VOLUNTEERS APART...

To act as a sounding board for our research, non-profit participants were also asked, “*How do the benefits corporate volunteers generate differ from those that non-corporate volunteers generate?*”

All-in-all:

✓ ***63% of non-profit organizations believe corporate volunteers possess a number of VALUE-ADDED BENEFITS versus non-corporate volunteers:***

- **Economy of Scale.** Corporate volunteer programs commonly provide more people, more resources (both cash and in-kind) and the ability to get more things accomplished in a shorter period of time versus other groups.
- **Financial Resources.** The fact that many companies make financial contributions to the organizations where their employees volunteer is a benefit corporate volunteers have over others, at least in the eyes of many non-profits.
- **Ideas, Skills and Professionalism.** A number of non-profits see corporate volunteers’ knowledge, expertise and professional demeanor as a value-added benefit over other types of volunteers.
- **Reliability.** A significant number of non-profits also feel corporate volunteers are more reliable than other volunteers. In the words of many non-profit participants, “When companies/corporate volunteers say they’re going to do something, they do it. When they say they’re going to show-up, they show-up.”

“Corporate groups tend to be more cohesive and more likely to return with the same volunteers than congregation groups or individuals. We also find that corporate groups come with a more consistent level of funding for the projects they work on than non-corporate groups, and are more likely to be pre-organized since there is a structure in a corporation that suits the kind of work that we do.”

Megan Gannon
Director of Development
Greater Bridgeport Habitat for Humanity

✓ ***37% of non-profit organizations believe that there is NO DIFFERENCE between the benefits corporate and non-corporate volunteers provide***

CHALLENGES TO WORKING WITH CORPORATE VOLUNTEER PROGRAMS...

While most non-profits feel corporate volunteers provide a number of value-added benefits which other volunteers do not, working with corporations and corporate volunteers is not all “peaches and cream.” During the course of the research, non-profits were asked to list the challenges or drawbacks working with corporate volunteer programs.

✓ ***66% of non-profit respondents report having experienced, at some point in time, challenges/difficulties when working with companies and corporate volunteers***

The following represent the ten most popular challenges non-profit organizations have faced/experienced when working with companies and corporate volunteers:

TOP 10 CHALLENGES TO WORKING WITH CORPORATE VOLUNTEER PROGRAMS

1. Companies often have unrealistic expectations on the impact their involvement can have and the time it takes to achieve real results

“Companies often expect immediate results or impact and need to be a bit more patient. Companies and corporate volunteers also need to celebrate the small moments/successes. And last, companies have a difficult time understanding how much time and money goes into putting together corporate volunteer projects and why we would like money from them to support these programs.”

Becky James-Hatter
President & CEO
Big Brothers Big Sisters of East Missouri

2. Companies often fail to realize the strain providing them with group projects puts on a non-profit’s resources (e.g. time, labor and capital)
3. Companies can put undue pressure on an organization to come up with ideas/projects for volunteers to do, particularly when there isn’t need
4. Often times employees are not available when they are really needed, especially during the workday

“Companies underestimate what it takes to plan events for large groups. Often, companies take a condescending attitude towards working with non-profits. And sometimes, companies simply just don’t understand and are unwilling to accept the fact that we don’t have the capacity and capability to handle every request.”

Rick Akin
Manager, Volunteer Services
City Harvest

5. Some companies are more concerned that their employees have an enjoyable experience rather than ensuring that the clients’ or projects’ needs are addressed

“Corporate groups often want to volunteer in too large of groups (outside of working hours). They often want client contact in ways that do not work/fit with our program. And sometimes, companies are more interested in utilizing volunteer projects for teambuilding exercises rather than helping us to address our needs, or those of our clients.”

Carol Field
Volunteer & Special Events Coordinator
Raphael House

6. Sometimes corporate volunteers take a condescending attitude towards the people they’re supposed to be helping
7. Sometimes corporate volunteers have own agendas which contradict that of the non-profit and also feel they know better what needs to be done than the non-profit’s staff
8. Sometimes companies provide non-profits with the wrong people – volunteers who only show up to get out of work
9. Companies aren’t always clear or open about their expectations, especially how they would like to be recognized for providing volunteers and support
10. Sometimes CR/volunteer personnel lack the knowledge, skills and experience necessary to successfully manage volunteers and run volunteer programs

“The main reason people stop volunteering is poor management and communications! If unrealistic expectations exist on the part of either the corporate volunteer or the community organization; the project or task will be unsuccessful. For instance, community organizations often expect that a corporate volunteer project(s) will lead to dollars from that company. And, on the corporate side; volunteers often expect that the community organization is managed as tightly as their company.”

Pat Cundiff
Vice-President, Direct Services
Heart of America United Way

Additional challenges non-profit organizations have experienced when working with companies and corporate volunteers include:

- A corporation's own goals/objectives can overshadow organization's mission/purpose
- Corporate teams of volunteers are often too large for the non-profit to manage effectively
- Some companies want client contact in ways which the non-profit cannot provide
- Business demands often impact volunteer dependability, especially for mentoring programs which take place during the workday
- Change in management, either at the top or within CR, can often significantly impact the relationship
- Corporate volunteers occasionally bring young children to age-inappropriate events

WHAT'S INTERESTING TO KNOW...

When the individual responses of non-profit participants on both community and direct benefits of corporate volunteerism are grouped into like categories, the following prioritization/valuation can be seen:

PRIORITIZING COMMUNITY BENEFITS OF VOLUNTEERISM – NON-PROFITS

23% “Financial and In-kind Resources”
 23% “Relationship Building”
 19% “Manpower/Sweat Equity”
 19% “Knowledge and Expertise”
 16% “Quality of Life”

When compared to CR/volunteer managers and senior executives, non-profit participants tend to value the community benefits of volunteerism more evenly. As the research shows, there is only a 7% spread between non-profit’s views on the most and least significant benefits of corporate volunteer programs, versus 13% and 16% spread between executives’ and managers’ remarks, respectively. Also, while non-profits value corporate volunteer programs primarily for the ***Financial and In-kind Resources*** they provide, non-profits equally value these programs for their abilities to build and strengthen relationships among various groups throughout the community. What is perhaps the most interesting discovery is that non-profits organizations see corporate volunteer programs’ abilities to impact the ***Quality of Life*** – to make communities better places to live and work – as one of the least significant community benefits.

In other words, based on their comments:

Non-profits feel corporate volunteer programs have a greater impact on individual organizations than they do overall communities.

“Corporate volunteers bring resources often unavailable otherwise to a community organization through specific skills, expertise and experience. As well, the community organization provides an opportunity for the corporate volunteer to impact quality of life in the community and attain new levels of personal and professional growth.”

Pat Cundiff
 Vice President, Direct Services
 Heart of America United Way

Although not a perfect correlation, non-profit participants and CR/volunteer managers tend to value volunteerism more closely than non-profits and senior executives, and even more similarly than managers and executives. While this phenomenon can be attributed to any number of causes, the most reasonable seem to be that: 1.) managers have a more intimate knowledge of their non-profit partners' views, needs and opinions because it is their job; 2.) managers tend to volunteer more than senior executives and get to interact, first hand, with non-profits; and 3.) managers, more so than executives, tend to live in the communities where their non-profit partners operate and have a greater opportunity to witness the impact of their work. If senior managers were more willing to "get their hands dirty" and volunteer more on a "grass-roots" level and less so via board service, then their views and opinions of senior management on the value, benefit and impact of volunteerism might better align with CR/volunteer managers and non-profit organizations.

Additionally, based on the research findings:

- ✓ Non-profits irrespective of the size of their staff, value corporate volunteerism for its ability to help **Build Capacity** and increase services to clients
- ✓ The larger the non-profit, both in terms of its operating budget and staff size, the more frequently they see:
 - **Financial Support Provided via Corporate Contributions** as a community benefit
 - **Financial Support Provided via Employee Giving** as a community benefit
 - The **Ability to Motivate Others to Get Involved** as a community benefit
 - Corporate volunteers as more dependable and committed than others
- ✓ The larger a non-profit's operating budget, the more frequently:
 - **Manpower** is seen as a community benefit
 - **Access to Other Community Resources** is seen as a community benefit
- ✓ The smaller the non-profit, both in terms of its operating budget and staff size, the more they:
 - See corporate volunteer programs **Bringing Communities Closer Together**
 - Appreciate the **Degree of Professionalism / Business Acumen** corporate volunteers demonstrate
- ✓ 90% of the non-profits that feel corporate volunteer programs **Help Communities Become Better Places to Live and Work** maintain operating budgets in excess of \$1M

CONCLUSION

CR/volunteer managers see senior management as both the greatest asset and largest obstacle to the success of their volunteer programs. This difference hinges on whether or not senior executives “get it,” i.e. whether or not they are on the “same page” as CR/volunteer managers. As the research clearly shows (and as it will subsequently continue to do so throughout the rest of the report), managers and executives agree on certain issues related to volunteerism, while disagreeing on others. Specifically, while managers and executives both believe in and support the business case for volunteerism – that volunteer programs generate benefits for companies, communities and employees – executives tend to place a greater emphasis on how their programs benefit their communities, while managers tend to focus on the ways volunteerism benefits their companies. In the end, although not necessarily a bad thing, both managers and executives seem to place the least amount of emphasis on how volunteerism benefits their employees.

For the most part, CR/volunteer managers and senior executives agree on how their companies and employees benefit by volunteering, even though the emphasis may differ. The biggest bone of contention between executives and managers is how corporate volunteerism benefits communities. Senior executives tend to concern themselves, almost exclusively, on how their volunteer programs benefit their communities on the “macro” level. In other words, executives tend to be more interested in generating the greatest amount of good for the greatest number of people. Executives also place an extremely high value on the manpower/human resources they are able to provide through their corporate volunteer programs.

CR/volunteer managers, on the other hand, tend to acknowledge both the “macro” and “micro” benefits for the community. In addition to helping large numbers of people, managers also see, and are supportive of, the benefits which volunteer programs generate for specific sub-populations (e.g. children, students, homeless, etc.), as well as for their individual non-profit partners. Managers also understand and appreciate, more so than executives, how communities and non-profits benefit from the financial and in-kind support that their programs provide, in addition to the human resources.

Furthermore, the research also clearly demonstrates that companies are, for the most part, providing the resources communities, and in particular their non-profit partners, want and need. Moreover, CR/volunteer managers seem to know better than senior executives what their communities and their non-profit partners need, as indicated by the congruency of managers’ and non-profit participants’ responses. In the end, however, although a majority of non-profit groups tend to feel that corporate volunteers bring a number of value-added benefits to their organizations versus other types of volunteers, corporate volunteer programs are having a greater impact on specific issues and organizations than they are the overall community. In other words, non-profits readily see the tremendous amount of work companies, through volunteerism, are doing to assist specific groups, needs and issues, but feel companies can and need to do more to truly make communities better places to live and work.

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW...

- ✓ *When trying to sell senior management on the value of corporate volunteerism, CR/volunteer managers should stress how the program benefits the community, more so than how it benefits the company and/or employees.*
- ✓ *To sell senior management on how their programs are benefiting the community, CR/volunteer managers are going to need to solicit community feedback, as well as measure/evaluate the impact their programs are having.*
- ✓ *Although senior management may want to know, and place a great value in knowing, how their volunteer program is benefiting the overall community, based on the opinions of non-profit organizations, the ability to determine a single corporate volunteer program's impact on the entire community is impossible to calculate.*
- ✓ *Therefore, instead of trying to demonstrate how their volunteer programs are benefiting the overall community, CR/volunteer managers may have greater success and an easier time generating senior management buy-in and support, by highlighting the impact employee involvement is having on their non-profit partners.*

CHAPTER 2:

DETERMINING SUCCESS

INTRODUCTION

The overarching aim of this study is to help companies better evaluate the success of their volunteer programs and suggest the most effective steps they can take towards improving their programs. This sounds much easier than it really is, for what may be successful to one company, may not equate into success for another. Is success based on the number of employees who volunteer or the hours they serve? Or is success based on the number of people assisted or the amount of work that gets done? Or is it based on the level of personal joy and satisfaction employees receive from volunteering and their willingness to volunteer again? The goals, therefore, of this chapter are to try and explain:

- ✓ How companies define success
- ✓ How companies currently rate the success of their programs
- ✓ What companies feel it takes to build and maintain successful volunteer programs
- ✓ What companies are focusing on over the long- and short-term to improve their programs

Definitions of success not only vary from company-to-company, but between companies and communities, as well as between CR/volunteer managers and senior executives. As in the previous chapter, this chapter also compares and contrasts the views and opinions of managers and executives, and discusses the non-profit perspective on success – what, in the minds of their non-profit partners, is needed to have a successful volunteer programs.

DEFINING SUCCESS

What makes a corporate volunteer program successful? As noted above, success can be defined or measured in any number of ways: level of participation, outputs generated through service, degree of volunteer and/or non-profit satisfaction, etc. Knowing how companies define success, or rather the variables companies look at to determine success, is critical, especially when it comes to helping them improve upon current processes and practices.

During the course of the research, CR/volunteer managers and senior executives were both asked, “*How do you define success?*” Similar to why companies value volunteerism, managers and executives identified a myriad of factors that they look at when evaluating the success of their programs. Overall, CR/volunteer managers identified 24 unique variables or factors that they consider when evaluating the success of their programs. Senior executives, on the other hand, identified 16 unique factors of success – slightly more than half that of managers. While some managers base the success of their volunteer programs on a single factor – namely the level of employee participation – others utilize or consider as many as six. On average, however, managers typically base the success of their programs on three primary factors. Similarly, senior executives also base the success of their volunteer programs on three factors, but their definitions of success may include between one and five components.

Interestingly:

- ✓ One-in-three executives (34%) define success based on no more than two factors
- ✓ One-in-four executives (24%) base success solely on the level of employee participation
- ✓ One-in-seven managers (14%) base success solely on the level of employee participation

The following represent the primary factors CR/volunteer managers take into consideration when determining the success of volunteer programs:

TOP 10 FACTORS USED TO DETERMINE SUCCESS – MANAGERS

1. Level of Employee Participation (82%)
2. Degree of Employee Feedback (41%)
3. Degree of Community Feedback (25%)
4. Impact on Company's Image as a Good Corporate Citizen (20%)
5. Total Number of Projects Completed/Organizations Helped (18%)
6. Degree to Which Community Benefits are Achieved (16%)
7. Impact on Brand Awareness/Recognition (11%)
Degree of Management Buy-in at All Levels (11%)
Level of Employee Awareness of Program (11%)
10. Amount of Third Party Recognition/CR Awards Won (9%)

(%) denotes the percentage of participants that provided this response

"For a volunteer program to be successful, employees at all levels of the company have to be supportive of, and engaged in, volunteerism. I think volunteerism thrives at a company like General Mills because that support comes not just from the top down (from our CEO and senior executive officers), but from employees, as well, who are passionate about the volunteer work they do for their communities. Another key to a successful program is to have buy-in from middle managers who can help support employees in their volunteer work."

Donna Svendsen
Associate Director, Community Action
General Mills Company

Less than seven percent of managers also include the following in their definitions of success:

- Degree to which companies annually increase support for volunteerism
- Level of support (human and financial resources) companies allocate for programs
- Level of senior management participation
- Level of employee participation in workplace giving/United Way campaigns

Furthermore, less than five percent of managers base success on the following:

- How their programs stack-up/benchmark against peers and competitors
- Level of volunteer retention
- Level of participation on non-profit boards of directors
- How strategically designed and focused their programs are
- Degree to which volunteerism is part of the corporate culture

The following represent the primary factors which senior executives base the success of volunteer programs on:

TOP 10 FACTORS USED TO DETERMINE SUCCESS - EXECUTIVES

1. Level of Employee Participation (66%)
2. Degree to Which Program Goals and Objectives are Achieved (41%)
3. Degree to Which Business Benefits are Achieved (38%)
Degree to Which Community Benefits are Achieved (38%)
5. Degree of Employee Feedback (34%)
6. Level of Support/Resources Provided by Company (17%)
7. Level of Senior Management Buy-in and Support (14%)
8. Degree of Community Feedback (10%)
Level of Internal/Employee Awareness for the Program (10%)
Impact on Company's Image as a Good Corporate Citizen (10%)

(%) denotes the percentage of participants that provided this response

"We define a highly successful volunteer program as one which benefits our employees, the community and the company. First, success is based on how much employees enjoy their experiences, as well as by how much they get out of their experiences, particularly in terms of personal and professional development. Second, success is based on the degree we are able to have a meaningful and measurable impact on key community issues, such as literacy. And third, success is based on how much volunteerism is able to help convey Verizon's commitment to being a good corporate citizen."

Patrick Gaston
President
Verizon Foundation

Less than ten percent of executives also consider the following when determining whether or not their volunteer programs are successful:

- Level of senior management participation
- Level of employee giving via Dollars for Doers programs
- Impact on employees' skills/leadership development
- How strategically-designed and focused their programs are
- Impact volunteerism has on recruiting employees

Overall, the research shows that:

CR/volunteer managers and senior executives define success in a very similar fashion.

Level of Employee Participation. Both CR/volunteer managers and senior executives overwhelmingly determine success based on the level of employee participation. More than four out of five managers (82%) and two-thirds of executives (66%) base the success of their programs, in large part, on the number of people who show up to volunteer, as well as the total number of hours served. While managers tend to focus almost exclusively on employee participation in company-sponsored volunteer events and activities, a significant portion of executives also take the level of employees' personal or individual service into consideration.

"Success is determined by how the company effectively addresses social issues within its communities and helps to create change. Success is also determined by the number of employees involved in their communities, beyond corporate sponsored events. And lastly, success is determined by volunteerism's impact on building a stronger, more cohesive workforce."

Carrie Schwab-Pomerantz
President
The Charles Schwab Foundation

Degree of Employee Feedback. More than one-third of managers (41%) and executives (34%) also place a great deal of emphasis on the formal and informal feedback they receive from employees when determining the success of their programs. While the majority of these companies actively solicit employees for their feedback through surveys, questionnaires, focus groups and the like, 17% do not – they passively collect feedback when employees volunteer the information.

While the degree of support senior management provides to a volunteer program may be crucial to its success, the **Level of Senior Management Participation** is sparingly used by both CR/volunteer managers and senior executives to gauge the success of their programs.

Managers and executives tend to disagree the most with respect to **"inputs"** vs. **"outputs"** and **"outputs"** vs. **"outcomes."**

One in six executives (17%) defines success based, in part, on the annual **Level of Support** the company provides (inputs) to maintain a volunteer program, both in terms staffing and budgets. Executives believe that this factor is especially important during times of poor economic/corporate performance. A similar number of managers (18%), however, evaluate success, in part, on the **Total Number of Projects Completed and/or Organizations Helped** (outputs) in a given year, based on the level of resources they have.

In terms of "outputs" vs. "outcomes," by more than a two to one margin, executives (38%) more so than managers (16%), define success in terms of the **Degree to Which Community Benefits are Achieved**. Furthermore, 38% of executives also include the **Degree to Which Business Benefits are Achieved** when calculating the success of their volunteer programs.

“A highly successful volunteer program depends a great deal on the objective of the volunteer program. At Boeing, we view corporate volunteerism as strategic employee engagement; in other words, the activity is aligned with our strategic citizenship objectives and there are desired outcomes that can be measured qualitatively (e.g. if the intent is to eliminate homelessness, does the volunteer effort of fixing up houses or building houses really address the cause of homelessness or address an immediate need?). If the objective of a company’s volunteer program is teambuilding, then the results of the impact in the community may be less important than the degree employees build camaraderie. All are important depending upon the objective.”

Toni Bailey
VP, Community & Education Relations
The Boeing Company

WHAT’S INTERESTING TO KNOW...

Based on the research findings:

- ✓ While a significant portion of managers believe their companies value volunteerism due to the various business benefits they may enjoy, very few, if any, evaluate the success of their programs based on the ***Degree to Which Business Benefits are Achieved***
- ✓ While executives tend to down-play the business and employee benefits as reasons why their companies should value volunteerism, a considerable number base the success of their programs on the ***Degree to Which Business Benefits are Achieved***, as well as the ***Level of Employee Participation, Degree of Employee Feedback*** and ***Impact on Employees’ Skills and Leadership Development***
- ✓ The larger the company, the less managers base success on ***Employee Participation*** and the more they base it on ***Community Feedback*** and the ***Company’s Image as a Good Corporate Citizen***
- ✓ The smaller the company, the more CR/volunteer managers base success solely on ***Employee Participation***

Furthermore:

- ✓ The more successful managers and executives rate their programs, the more they base success on ***Employee Feedback***, and less so on ***Employee Participation***
- ✓ The more successful managers rate their programs, the more they base success on the formal and informal ***Community Feedback*** they receive, both actively and passively
- ✓ The more successful managers rate their programs, the less frequently they base success on the ***Degree to Which Community Benefits are Achieved***, as well as their ***Images as Good Corporate Citizens***

THE NON-PROFIT PERSPECTIVE ON SUCCESS

While non-profit organizations value and support corporate volunteerism for the same or similar reasons as CR/volunteer managers, they tend to define success more along the lines of senior executives. As such, managers need to pay careful attention when working with their non-profit partners to ensure that there is a shared vision, in terms of what both parties hope to achieve, and an agreed upon definition of success; otherwise, either party may be left hurt and disappointed with the results once volunteer events and activities are completed.

When evaluating success, non-profit organizations, on average, focus on two main factors, although they may consider as few as one to as many as four factors. Overall, non-profit participants define success based on 17 unique factors, the most prevalent being:

FACTORS USED TO DETERMINE SUCCESS – NON-PROFITS

1. Level of Volunteer Participation and Retention (58%)
2. Degree to Which Community Benefits are Achieved (39%)
Degree of Volunteer Feedback (39%)
4. Degree to Which Program Goals and Objectives are Surpassed (21%)
5. Degree of Community/Client Feedback (13%)
Results of Internal Evaluations (13%)
7. Level of Volunteer Management (11%)
8. Level of Volunteer Satisfaction (8%)

(%) denotes the percentage of participants that provided this response

“Success is measured in volunteers’ knowledge and belief that their time was meaningfully used, and that meaningful, tangible outputs and outcomes were achieved. Volunteers are compelled to continue to volunteer knowing that they made a real difference and impact.”

Lissa Hilsee
President & CEO
Philadelphia Cares

Less than five percent of non-profit participants also determine success based on:

- Degree to which volunteers encourage/recruit others to volunteer
- Total dollars raised (fundraising)
- Degree to which projects achieve their goals/objectives
- Degree to which volunteers take on greater responsibilities
- Total amount of corporate contributions given to support employee volunteers
- Degree to which volunteerism is supported by all levels of management

Volunteer Participation and Retention. Non-profit participants, like their corporate counterparts, overwhelmingly define success in terms of the number of people who show up to volunteer and the number of hours they serve. However, non-profits also gauge the success of volunteer programs on the frequency which volunteers continue to volunteer – ***Level of Volunteer Retention*** – as well as their willingness/effectiveness to recruit others to join them.

“A successful program increases volunteers and productivity on a steady basis. Success is also measured by repeat involvement by volunteers and companies.”

Mimi Cavanaugh
Volunteer Services Manager
Resource Area For Teachers (RAFT)

Degree to Which Program Goals and Objectives are Surpassed. More than one-third of non-profit organizations (39%) base success on the ability of volunteer programs to not only meet, but exceed stated goals and objectives. In other words, to be successful, volunteer programs need to go beyond simply addressing community needs – they need to truly make a difference by solving/alleviating community needs and issues.

Volunteer and Community/Client Feedback. Key to evaluating the success of volunteer programs is the degree of feedback received from both volunteers, as well as the community, in particular the people or clients whom non-profits serve.

Level of Volunteer Management. The amount of time and attention that goes into planning volunteer events and activities, as well as coordinating/managing volunteer participation, directly impacts success in the eyes of non-profits.

Internal Evaluations and Volunteer Satisfaction. A significant percentage of non-profits not only base the success of volunteer programs on the comments, feedback and suggestions employees provide, but the degree to which employees enjoy their experiences and are willing to return. For many non-profits, employee feedback and satisfaction needs to be measured more than simply once-a-year. Employee feedback and satisfaction must be measured continuously through formal internal evaluations, particularly focus groups, for programs to be successful.

“Success is defined by the accomplishment of the goals, the quality of the volunteer’s experience and the willingness of the volunteer to come again.”

Arto Weedley
Executive Director
Frontline Outreach

CALCULATING SUCCESS AND THE “S” VALUE

Now that we know how CR/volunteer managers and senior executives define success, the next step is to determine how successful they feel their programs are. It would have been ideal to use one or more of the variables/factors managers and/or executives use to evaluate the success of their programs, such as the level of employee participation, but fewer than 50% of the companies involved in this study were able to provide accurate and reliable data. Therefore, to gauge the current success of corporate volunteer programs, both CR/volunteer managers and senior executives were asked to rate the success of their volunteer programs on a scale from one to seven, with each score represented by the following:

LEVELS OF SUCCESS

- 7 = “Highly Successful”
- 6 = “Successful”
- 5 = “Somewhat Successful”
- 4 = “Neutral”
- 3 = “Somewhat Unsuccessful”
- 2 = “Unsuccessful”
- 1 = “Highly Unsuccessful”

CR/volunteer managers and senior executives rate the success of their volunteer programs 5.79 and 5.86 out of a possible 7.00, respectively. Although executives, on average, rate their programs slightly higher than managers, statistically, there is no significant difference between the scores. What is interesting is the dispersion of managers’ and executives’ scores:

THE SUCCESS OF CORPORATE VOLUNTEER PROGRAMS

<u>CR/Volunteer Managers</u>	<u>Senior Executives</u>
19% “Highly Successful”	28% “Very Successful”
51% “Successful”	31% “Successful”
21% “Somewhat Successful”	41% “Somewhat Successful”
6% “Neutral”	0% “Neutral”
2% “Somewhat Unsuccessful”	0% “Somewhat Unsuccessful”

As the research shows, 70% of managers view their programs as either “Successful” or “Highly Successful” versus 59% of executives. Based on the findings from LBG Associates’ 2001 study on corporate volunteerism, this should not be much of a surprise, given the number of managers who feel that they do not necessarily see “eye-to-eye” with senior management on volunteerism. Furthermore, what is interesting is that a greater percentage of executives feel that their programs are both more and less successful than managers. Nearly twice as many executives than managers (41% to 21%) consider their programs to be “Somewhat Successful,” whereas

executives consider their programs “Very Successful” 50% more frequently than do managers (28% to 19%). Coupled with the fact that no senior executives gave his/her volunteer program a failing grade by rating it less than “Somewhat Successful,” it can be surmised that:

Senior executives tend to be both more critical and optimistic about the success of their volunteer programs than CR/volunteer managers

In the end, however:

Both managers and executives consider their volunteer programs to be “Successful”

Local Offices vs. Corporate Headquarters

While the primary aim of this study is to help companies improve the overall success of their programs, during the course of the interviews, CR/volunteer managers were asked, “Does the level of success differ between local/field offices and the corporate headquarters communities?” Based on their responses:

- ✓ 49% of managers believe that success is fairly consistent across the entire company*
- ✓ 51% of managers believe that success differs significantly from location-to-location:
 - Nearly half feel that programs at their headquarters are more successful because there are more people available to volunteer; more financial and human resources to run events and activities; and greater buy-in and support from senior management
 - One in five managers believe local/field offices are more successful because they enjoy greater buy-in and support from local (senior) management and have an easier time recruiting/motivating people to volunteer because of their smaller, more cohesive work environments
 - One in six companies only maintain volunteer programs at their corporate headquarters
 - And one in seven cannot explain why certain offices are significantly more successful than others, but they just know they are

** this applies only to offices located in the United States*

“Most volunteers tend to participate with the non-profits based in their own communities. People get involved with their children’s schools, their local theatre groups, their fathers’ VFW chapter, etc. Most volunteers are personally motivated by experiences that touch their own lives, and are typically involved with organizations located close to home. Field offices are comprised solely of individuals living in the community the office serves, while headquarters are often comprised of personnel who commute in from outside the headquarters community.”

Saundra Knight
Program Manager, Community Relations
Sempra Energy

The “S-value”

For the purposes of this study, the level of success a participant rates his or her own volunteer program is referred to as the program’s **“S-value”** and will often be represented throughout the report as (S=). The higher the S-value, the more successful a participant, or group of participants, rate the overall success of their volunteer programs. Similar to using the size of a company, the utilization of S-values allows us to compare and contrast the opinions of companies with “more successful programs” with those that feel they have “less successful programs.” Ultimately, it is through the use of these S-values that we hope to mathematically demonstrate why certain programs are more or less successful than others, and recommend plausible steps companies may take to improve their programs.

KEY COMPONENTS OF A SUCCESSFUL VOLUNTEER PROGRAM

As the research shows, while CR/volunteer managers and senior executives may consider a multitude of factors when evaluating the overall success of their programs, the majority of both consider their programs to be “Successful” or “Highly Successful.” But what does it take to be this successful? To determine this, CR/volunteer managers were asked to, *“Please list the key traits, characteristics and/or components of a highly successful corporate volunteer program.”*

Overall, CR/volunteer managers identified 42 “key components” necessary to build and maintain a successful corporate volunteer program. On average, managers typically identified seven “key components,” although responses ranged from as few as two to as many as twelve. The following represents the most common “key components” according to CR/volunteer managers:

KEY COMPONENTS OF SUCCESSFUL PROGRAMS – MANAGERS

1. Senior Management Buy-In and Support (74%)
2. Active, On-Going Internal Communications (62%)
Employee-Friendly Programs and Practices (62%)
4. Dedicated Staff (53%)
5. Dedicated Budget and Resources (51%)
6. Recognition (45%)
7. Formal and Appropriate Structure (43%)
8. Employee Ownership (38%)
Measurement and Evaluation (38%)
10. Infuse Volunteerism Into Corporate Culture (21%)
Programs Need to be Strategically-Focused (21%)
Right Community Partners (21%)
13. Signature Programs and Annual Events (11%)
Community Needs are Addressed/Incorporated (11%)
Program Needs to Generate External Visibility/Recognition (11%)

(%) denotes the percentage of participants that provided this response

Senior Management Buy-In and Support. Like any other business function, a corporate volunteer program's ultimate success is determined by the extent to which senior management endorses the program. If senior leaders fail to see the value or business benefits associated with creating and/or maintaining a corporate volunteer program, very rarely will a company do anything, on a formal basis, to support employee volunteerism. To address this problem, many participants actively engage senior executives by getting them personally involved in the volunteer events and activities sponsored by the company. In fact:

- ✓ 21% of managers consider **Senior Management Participation** as a “key component” – executives must support volunteerism both in word, as well as in action

Furthermore:

- ✓ 13% also feel that buy-in and support from **All Levels of Management** is vital to the success of their programs

“When you have senior managers involved in volunteer activities, employees tend to see senior management’s involvement as meaningful and of real (personal) interest to them, rather than a ‘do as I say’ approach to encourage employees to volunteer.”

Angela Woods
Manager, United Way & Volunteer Programs
American Express Company

Active, On-Going Internal Communications. One of the most important components to running and maintaining a successful corporate volunteer program is generating and sustaining a high level of employee participation; without a consistent and/or increasing level of employee involvement, even the best programs are doomed to fail. To accomplish this, 62% of CR/volunteer managers acknowledge the need to have a highly developed communications plan and marketing strategy in-place to continuously recruit and retain volunteers. Key to recruiting and retaining employees is knowing what information they need to know, developing the right messages to convey this information and utilizing the correct mediums; in short, knowing what to say, how to say it and to whom is essential! Successful programs communicate general information on the program and how to get involved, and typically entice employees by selling them on the various benefits of the program. This information is provided on a consistent basis so that messages are not easily forgotten.

Employee-Friendly Programs and Practices. Another “key component” to generating and sustaining a high level of employee participation is creating a program, as well as planning, organizing and executing volunteer events and activities, that make employees *want* to get involved. To accomplish this, 53% of CR/volunteer managers believe that successful volunteer programs need to implement *Employee-Friendly Programs and Practices*, including the following:

- ✓ **Incorporate/address employees’ needs and interests by planning events around topics, issues and organizations important to them.** While it makes perfectly good sense for a pharmaceutical or healthcare company to plan events and activities around disease-related causes and organizations (e.g., breast cancer, leukemia and lymphoma, MS, etc.), employees may be more interested in building a Habitat House or volunteering with their child’s school. As such, 30% of managers feel companies need to balance corporate objectives by incorporating employees’ interests, needs and concerns.
- ✓ **Make it easy for employees to get involved through turnkey processes.** Companies can significantly impact employee participation by creating “one-stop-shopping” resources where employees can go to easily learn about opportunities available to them, who to contact and how to get involved. In particular, 26% of CR/volunteer managers feel that creating a volunteer intranet site where employees can learn about and sign-up for events and activities by simply “pointing-and-clicking,” can significantly impact employee interest, enthusiasm and participation.
- ✓ **Provide opportunities for employees to volunteer during the workday.** The era of the 40-hour work week is dead. Because companies are demanding employees work longer hours, they have less time, not only to spend with their families, but less time to volunteer, as well. While 15% of managers consider providing employees with paid time-off to volunteer a “key component” to success, many suggest that a high level of employee participation can be achieved by simply allowing employees to take advantage of flex-time policies, making arrangements with their supervisors, and utilizing volunteerism in teambuilding activities.

- ✓ **Offer a variety of opportunities to employees.** Successful volunteer programs, according to 26% of managers, need to do more than just incorporate employees' needs and interests – they need to offer something for everyone. While employees may enjoy building Habitat houses or volunteering as tutors/mentors, they may not want to do this all the time. Although an employee may normally volunteer as a mentor or tutor, these managers feel that he/she often wants to “change it up” by cleaning-up a park, volunteering at a food bank, building a Habitat house and/or participating in a walk or two. As such, to be successful, companies need to continuously offer a variety of events and activities for employees to choose from. Doing so will impact employee participation and satisfaction, as well as prevent burnout.
- ✓ **Solicit employee feedback.** Successfully incorporating employees' needs and interests, as well as offering a variety of events and activities they would like, requires companies to actively solicit employees for their feedback. Soliciting feedback does not simply help managers know what to do, but also what not to do. Learning what employees' dislike, or would like to see done differently, also impacts volunteer participation and retention. Although soliciting employee feedback is important, only 11% of CR/volunteer managers consider it a “key component” to success.

Dedicated Staffs and Budgets. Simply put, for a volunteer program to succeed, a company will need to assign adequate personnel and allocate sufficient funds just as it would any other corporate function. Without a dedicated staff and/or budget, over 50% of CR/volunteer managers feel that companies will find it nearly impossible to maintain a volunteer program with any degree of success.

“To sustain your volunteer program you need resources. Dedicated resources speak loudly that a company is committed to volunteerism and that it is not a one-time effort. The resources need to assist in recruitment, supplies and recognition – all additional key ingredients to a successful project that involves people.”

Cheryl Thompson
Volunteer & United Way Project Leader
Target Corporation

Recognition. While “personal” or “individual” volunteerism is generally undertaken without the expectation of recognition, compensation or personal benefit, the fact that corporate volunteerism is intentionally undertaken, among other things, to generate specific benefits for the company, thanking employee volunteers not only becomes an option, but in the eyes of 45% of CR/volunteer managers, mandatory. Coupled with the fact that corporate volunteer programs would not exist without the involvement of employees, and subsequently, those benefits mentioned previously would not be generated, companies should incorporate a way to say “thank

you” to employees for their contributions of time and talent. Although acknowledging employee service may be done on either a formal or informal basis, recognition is not only key to the success of any program, it is often the cornerstone of many.

In addition to simply saying “thank you:”

- ✓ 13% of managers consider *Dollars or Doers* and/or *Matching Gifts programs* with volunteer components as “key components” of successful corporate volunteer programs

Formal and Appropriate Structures. For corporate volunteer programs to succeed, volunteer events and activities cannot be planned, organized and executed haphazardly. To be successful, 43% of CR/volunteer managers feel the need to take the time to formally shape their programs by developing and implementing *Formal and Appropriate Structures*:

- ✓ **Mission/value statement.** The first step in creating and managing any successful program, let alone a volunteer program, is knowing and understanding why the program is being undertaken – a mission or value statement does just that. The mission statement, which outlines why a company values employee volunteerism, is targeted at both internal and external audiences. In short, the mission or value statement “sets the stage” in terms of defining the degree to which the company plans on encouraging, promoting and supporting its employees’ community service initiatives. Although important, only 11% of managers feel that mission statements, alone, are “key components” to success.
- ✓ **Sensible policies and guidelines.** Volunteer guidelines and policies are necessary for establishing the scope and parameters within which a formal corporate volunteer program operates. Guidelines and policies serve to define who is eligible to participate, which types of activities and organizations are acceptable or unacceptable (often referred to as eligible or ineligible) and when volunteer activities will be conducted (i.e., release policies). More than one-in-five managers (21%) consider policies and guidelines to be “key components” to the success of their volunteer programs.
- ✓ **An appropriate structure.** In conjunction with stating who can participate and in what types of projects, guidelines also outline how the projects and employees will be structured and organized. Well developed guidelines outline how the program is run (i.e., employee volunteer council, network of employee “champions” or volunteer coordinators, by the company’s community relations department, etc.) and differentiate between how national and local programs are structured and operated. Choosing the right program structure/volunteer organization is a “key component” in the eyes of 28% of CR/volunteer managers.
- ✓ **Definitions.** A smaller portion of managers feel that the key to a formal structure, as well as the overall success of a program, is ensuring that everyone is on the same page. This not only involves having a clearly stated definition for success, but definitions for other key aspects, as well.

- ✓ **Duties and responsibilities.** One of the most overlooked, yet essential, parts of a volunteer program's guidelines are the delineation of rights, duties and responsibilities of those involved in the program, namely the volunteers and management. They should outline what is expected of employee volunteers, as well as what they are allowed to do, before, during and after the event or activity. Additionally, volunteer policies and guidelines should identify who the key players are, define their rolls and responsibilities and explain how they relate to one another, especially if the program is supported by an employee volunteer council.

"While employee volunteers are usually willing to support causes that the company has a particular interest in, a good volunteer program will also have the flexibility to offer a broader range of opportunities. Ideally, that flexibility will extend to program elements that encourage employees to initiate projects that are 'near and dear' to them and that are supported by the company."

Dale Harris
Director, Local Initiatives
Prudential Financial

Employee Ownership. More than one in three managers (38%) believe truly successful volunteer programs allow for, and encourage, employees to have a stake in "running the show." Successful volunteer programs are not only driven from the top down via senior management buy-in and support, but from the bottom-up, as well. Successful programs inspire employees to take an active role in planning and organizing activities, managing budgets, recruiting volunteers and maintaining non-profit relations, just as much as they inspire employees to want to volunteer.

Measurement and Evaluation. Measurement and evaluation, which incorporates a myriad of formal (i.e., focus groups, surveys, questionnaires, etc.) and informal (i.e., anecdotal stories) tools and techniques, has become one of the hottest topics of interest to corporate community relations professionals in recent years. The reason why measurement and evaluation (which also incorporates tracking participation) has become such a hot topic is that it is the only way in which the "true" success of corporate community relations programs, including volunteer programs, may be determined. By tracking, measuring and evaluating the results of volunteer projects against pre-determined goals and objectives, companies are not only able to see how successful or unsuccessful their efforts are, but are often able to use the data to generate significant buy-in and support from senior management.

According to the research, more than one-third of CR/volunteer managers (38%) view **Measurement and Evaluation** as a "key component" to the success of corporate volunteer programs, which, by our definition includes tracking:

- ✓ 13% of managers also view **Tracking Participation** as a "key component" of success, separate from, and in addition to, **Measurement and Evaluation**

- ✓ 19% of managers believe that for volunteer programs to be successful there needs to be ***Stated Goals and Objectives***. Measuring and evaluating a program is pointless in the minds of these managers unless the outputs and/or outcomes being measured and evaluated are held to some sort of standard, set by ***Stated Goals and Objectives***.

Right Community Partners. More than one in five CR/volunteer managers (21%) also believe having the ***Right Community Partners*** is key to the success of their programs. The “right” partner is defined broadly by managers as a non-profit which has the ability to successfully plan and organize events and activities, coordinate and manage volunteer participation, and recognize employee and corporate support, while at the same time effectively and efficiently utilizing corporate and community resources. If managers can succeed in getting employees to show-up to an event, they expect the non-profit to live up to its end of the bargain by making proper use of employees’ time and talents, and ensuring they have a good experience. Additionally, many managers stress the need to partner with non-profits that can meet the company’s needs, particularly the ability to provide group projects and provide the proper amount of recognition for the human and/or financial support they receive.

“Choosing the right non-profit organizations to partner with is key to the success of any volunteer program. Companies need to partner with organizations that have the infrastructure, capacity and resources in place to support successful volunteer events and projects which will provide volunteers with good experiences.”

Allyson Peerman
Director, Community Affairs
Advanced Micro Devices (AMD)

Infused Volunteerism into the Corporate Culture. Beyond a simple mission statement, beyond employee and management buy-in and support, beyond a high level of participation, more than one in five CR/volunteer managers (21%) believe that in order for their programs to be successful, volunteerism must be ***Infused into the Corporate Culture***. In short, volunteerism, as well as the concept of “doing well by doing good,” has to be valued just as much as diversity, corporate governance, generating profit, increasing marketshare, providing shareholder value, etc.

Signature Programs and Annual Events. ***Annual Volunteer Events*** refer to those volunteer events and activities that are conducted annually on a corporate-wide basis where a significant portion of companies’ workforces volunteer in the communities where they live and work. Annual volunteer programs are most commonly referred to as “national” or “global days of caring” or “make a difference days.”

For most companies, annual volunteer programs serve as the cornerstones to their corporate volunteer programs. For a few others, annual volunteer programs are the only company-sponsored volunteer events done during the year. Annual volunteer programs may take place over a day, a week or even a month. Companies many choose to limit participation to employees only, while others may choose to open events up to retirees, families, friends, clients, customers and business partners. A number of companies also provide employees with paid leave to participate in annual volunteer events, or allow them, with their supervisors' approval, to participate by utilizing flex-time policies and programs.

A **Signature Program** is similar to an annual volunteer event, in that it is a high-impact, highly visible corporate initiative that works to generate a considerable amount of exposure and goodwill for a company. Where a signature program differs is that it relates to a specific business goal or objective, focuses on a single community need or issue (i.e., domestic violence, homelessness, AIDS, hunger, education, etc.), and affects a clearly defined audience (i.e., women, the homeless, seniors, children, etc.). It also differs from an annual event in that it is unique to a specific company and cannot/is not easily modified and adopted by others. A signature event or activity should not be a one-time event, but designed to be carried-out over a significant period of time, if not the entire year and more than a one time event.

“Companies need to plan at least one to two large, corporate-wide events per year. These events need to be the same day each year, preferably days when nothing else is happening in the community (i.e., United Way Day of Caring, National Volunteer week, etc.). This way, every employee who wants to volunteer can, plus, they know enough in advance so they can plan appropriately. Furthermore, the company has the opportunity to generate exclusive exposure for its activities.”

Julian Brown
Director, Community Relations
Nicor

Community Needs are Addressed/Incorporated. Based in large part on their companies' reasons for valuing and supporting volunteerism, 11% of CR/volunteer managers also consider the ***Degree to Which Community Needs are Addressed/Incorporated*** into the overall program as “key components” to success. If the purpose of the volunteer program is to generate certain benefits for the community by addressing specific needs/issues, then there needs to be a plan in-place, a “road map” if you will, which explicitly states what those needs are, why they are important to the company and community, and how those needs will be address through volunteerism and community service. Interestingly, however:

- ✓ Less than five percent (5%) of managers feel ***Soliciting Community Feedback*** is a “key component” of success

NON-PROFIT PERSPECTIVE ON ENSURING SUCCESS

As a result of the research, it was refreshing to discover that non-profit organizations agree, in large part, with companies and corporations, on the “key components” needed to build and maintain a successful volunteer program. However, non-profits tend to have a much more concise view on what they consider as “key components.”

Overall, non-profit participants identified 26 “key components” necessary to build and maintain a successful corporate volunteer program – slightly more than half that of CR/volunteer managers. While on average non-profit participants believe there are six “key components” to a successful program, some feel success requires as few as two “key components,” while others as many as nine. The following represents the most prevalent “key components” to success, according to non-profit groups:

KEY COMPONENTS TO SUCCESS – NON-PROFITS

1. Employee-Friendly Programs and Practices (67%)
Volunteer Feedback (67%)
3. Quality Volunteer Management (64%)
4. Active, Three-Way Communications (56%)
5. Formal and Appropriate Structures (49%)
6. Dedicated Corporate and Non-Profit Staffs (38%)
7. Measurement and Evaluation (31%)
Training (31%)
9. Dedicated Budgets and In-kind Resources (26%)
10. Community/Client Feedback (21%)
11. Senior Management Buy-in, Support and Participation (18%)

(%) denotes the percentage of participants that provided this response

“To ensure success, programs need a well defined mission with clearly stated roles and responsibilities, proper training/orientations that are mandatory for volunteers, proper ‘tools’ to do the job, lots of opportunities for volunteer feedback so that issues are solved as they arise and acknowledgement of volunteers’ contributions as often as possible.”

Cathy Guinta
Executive Director
Stamford Public Education Foundation

Overall, CR/volunteer managers and non-profit representatives agree on certain “key components,” but disagree, significantly, on others. The following represent the most notable differences and similarities in the views and opinions of CR/volunteer managers and their non-profit counterparts on the “key components” to success.

Senior Management Buy-In and Support. This is, by far, the most significant difference between companies and their non-profit partners in terms of “key components.” Unlike their corporate counterparts, only one in seven non-profits (18%) see the importance *Senior Management Buy-in and Support* plays in the success of corporate volunteer programs. Whether non-profits fail to understand and realize that the concept of volunteerism is not universally accepted throughout the executive ranks of corporate America, or that the financial and human resources companies annually provide to run volunteer programs are not a “given,” they overwhelmingly feel that employees will volunteer, and continue to volunteer, regardless of what senior executives do, or fail to do. In short, the bulk of non-profits believe that corporate volunteer programs can be successful without senior management buy-in and support.

Volunteer Feedback. Overall, two-thirds of all non-profits (67%) consider actively soliciting volunteer feedback as one of the most, if not *the* most important component of a successful volunteer program, versus only 11% of CR/volunteer managers. According to non-profit participants, soliciting employee feedback is the only true measure of volunteer satisfaction and employees’ willingness to volunteer again. Furthermore, actively soliciting volunteer feedback also helps determine the *Level of Knowledge, Understanding and Appreciation Employees Gain* with respect to the needs and issues affecting clients and communities – a key employee benefit/goal for 21% of non-profit participants.

Community/Client Feedback. In addition to knowing what employees think, by more than a two-to-one margin over their corporate counterparts, 21% of non-profits consider the solicitation of *Community and Client Feedback* as “key components” to the success of volunteer programs. In short, these participants feel that the only way companies will know whether or not they have made a true impact or difference is by asking the beneficiaries how well they, the companies, performed, and what they need to do differently.

“Everyone benefits when a diverse variety of stakeholders are involved in building community. Stakeholders may come in the form of individual volunteers, families, community groups and, of course, corporations. It is important when doing community work that we are always trying to balance the motivations of the individual or group volunteering with what the community needs. When working with all volunteers, including corporate volunteers, we work to manage expectations. This can be in terms of managing what the corporation would like us to do and what we have the capacity and capabilities to do. It’s important to manage expectations around what kinds of volunteer activities corporate groups think the community needs and what the community really does need. If expectations are managed successfully, then a ‘win-win’ situation is enjoyed by all.”

Becky Blumer
Assistant Director
Hands on Portland

Quality Volunteer Management. Another notable difference between CR/volunteer managers and their non-profit counterparts is the emphasis non-profits place on their skills and capabilities, and those of corporate CR/volunteer managers, to successfully plan, organize and manage volunteers, as well as events and activities. In short, nearly two-thirds of non-profits (64%) believe that success literally rests in their hands, as well as those of CR/volunteer managers. As such, volunteer coordinators, both on the corporate and on the non-profit end, need to undergo training, adopt best practices, pay attention to details, and recruit employees from all parts of the company. Interestingly, while a considerable number of managers consider staffing levels to be “key components:”

✓ *None of the CR/volunteer managers, who were part of this study, consider their personal knowledge, talents and expertise as “key components” to success*

“The key components of a successful volunteer program include: proper assessment of volunteer needs within the organization; the ability to recruit volunteers and market agency’s needs; understanding your volunteers and determining what motivates them; providing proper and direct supervision for volunteers; and having a volunteer staff that like doing what they do and can emit that enthusiasm to the volunteers.”

Matthew Kruse
Director, Corporate Partnerships
Community Resource Network

Recognition. While nearly half of all CR/volunteer managers (45%) feel recognition is vital to the success for their programs, less than 5% of non-profits agree. While thanking employees is an important thing to do – something that should be considered automatic – non-profits feel that recognition is not why people volunteer – it is not a “deal breaker” – nor does recognition need to be elaborate in order to be effective.

Training. Less than 10% of CR/volunteer managers versus nearly one-third of non-profit participants (31%) feel that training employees – either in terms of volunteering, planning and organizing events and activities, and/or serving on non-profit boards – is critical to the success of volunteer programs. In particular, non-profits noted that volunteerism, in general, is becoming ever more complex and specialized, that employees, more so now than ever, need to know how to perform certain tasks before getting involved. This applies to volunteering at a food bank or participating in a Habitat build just as much as it applies to serving on a non-profit board or participating in a mentoring/tutoring program.

Strategically-Focused Programs. Lastly, less than one in ten non-profits (8%), versus 21% of CR/volunteer managers, believe that volunteer programs need to be strategically focused to be successful. In fact, nearly one-in-five non-profit participants feel that a variety of events and activities that encompass all employees' needs and interests are considerably more vital to the success of a volunteer program than trying to balance employees' needs and interests with those of the company and the community.

“Successful volunteer events and activities are achieved through attention to detail, proper planning and coordination, sharing and implementation of ‘best practices,’ teamwork, and agreed upon outcomes among organizations, companies and employees/volunteers. Companies need to approach volunteerism as they approach running a profitable business.”

Lissa Hilsee
President & CEO
Philadelphia Cares

Employee-Friendly Programs and Activities. Non-profit participants, like their corporate counterparts, place a significant emphasis on the need for ***Employee-Friendly Programs and Activities***, especially when it comes to matching/addressing employees' interests and providing a variety of events and opportunities. Non-profit participants also stress the impact allowing volunteers ***Direct Interaction with Clients*** has on ensuring employee-friendly programs and activities, as well as providing volunteers with a ***High Level of Customer Service***.

A significant number of non-profit participants also feel that part of making volunteers' experiences enjoyable includes letting them see first-hand the fruits of their labors. As such, allowing volunteers to interact with the beneficiaries of their labor helps provide a pleasurable experience and motivates volunteers to keep coming back for more. Additionally, a significant number of non-profits also feel that part of ensuring an enjoyable experience mandates that continuous attention be paid to volunteers' needs and concerns by providing adequate supervision during the course of the event/activity. If nothing else, adequate volunteer supervision can address volunteer questions and concerns immediately, and correct potential problems before they happen, as opposed to addressing them after projects have been completed.

Active, Three-Way Communications. Simply put, in addition to active, on-going communications between companies and employees, 56% of non-profit participants also stress the need for active, on-going communications between companies and non-profits, as well as non-profits and volunteers, to ensure that everyone is “on the same page,” and that each party's needs, concerns and expectations have been taken into consideration. According to non-profit participants, effective communications happens before, during and after each and every event/activity occurs, not only when it is convenient or something goes wrong.

“Success is achieved through clear, open, on-going communications with volunteers, especially in terms of duties, responsibilities and expectations; good volunteer management – providing employees with information on procedures, specific requirements, etc.; follow-up with employees – making sure they had a good experience; and recognizing volunteers.”

Celia Silberberg
former Volunteer Services Coordinator
Capital Area Food Bank

Dedicated Corporate and Non-profit Staffs. Although more than one-third of non-profit participants (38%) agree with CR/volunteer managers that successful volunteer programs require companies to maintain ***Dedicated Staffs***, 21% also feel that non-profit organizations need to maintain dedicated volunteer staffs to coordinate employee participation on their end, as well.

“Planning, Planning, Planning. Staff people are assigned to every volunteer project. Staff members are very accessible to volunteers. We listen to volunteers and help them to figure out how to best give their time. For example, when a trainer wanted to volunteer, we didn’t make her tutor – our greatest need. Instead, we listened to what she wanted to do and that was one-to-one exercise and nutrition workshops for clients. Everyone loves it!”

Erika Goodman
Director of Development
The Hope Program

GOALS AND OBJECTIVES

Now that we know how companies define success, how successful they feel their programs are, and what they feel is necessary to build and maintain a successful program, we thought it would be interesting to know what managers and executives feel the goals are of their volunteer programs.

During the course of the research, CR/volunteer managers were asked to, “*Please identify the long-term goals of your volunteer program.*” Overall, managers identified 30 unique goals that they are focusing on over the *long-term* – goals which they feel will take more than a year to achieve. While the majority of managers are currently focusing on two long-term goals for their programs:

- ✓ 9% of managers have no long-term goals with respect to their volunteer programs

The following represent the most prevalent long-term goals of CR/volunteer managers:

LEADING LONG-TERM GOALS – MANAGERS

1. Enhance Company’s Image as a Good Corporate Citizen (43%)
2. Generate External Visibility, Recognition and PR (43%)
3. Foster Real, Meaningful Changes in the Community (34%)
 - Increase Employee Participation (34%)
5. Increase Brand Awareness via Volunteerism (19%)
6. Develop and Implement an On-line Tracking System (15%)
7. Positively Impact Employee Pride and Morale (11%)
 - Increase Management Participation at All Levels (11%)
 - Enhance Company’s Image as an Employer of Choice (11%)
10. Develop a More Strategically-Focused Volunteer Program (9%)
 - Develop and Implement Appropriate Measurement and Evaluation Tools (9%)

(%) denotes the percentage of participants that provided this response

Additionally, CR/volunteer managers were also asked to, “*Please identify the annual or short-term objectives of your volunteer program.*” Overall, CR/volunteer managers identified 34 unique objectives which they are focusing on over the *short-term* – objectives which they focus on every year or are hoping to achieve within the next twelve months. While the majority of managers are currently focusing on three short-term objectives:

- ✓ 6% of managers currently have no short-term objectives for their volunteer programs

The following represent the most prevalent annual/short-term goals of CR/volunteer managers:

LEADING ANNUAL/SHORT-TERM OBJECTIVES – MANAGERS

1. Increase Individual Employee Participation (55%)
2. Increase Internal/Employee Awareness for the Program (32%)
3. Increase Participation in Strategically-Related Activities/Organizations (21%)
4. Implement and/or Increase Employee Recognition Programs (17%)
5. Generate Greater External Awareness, Recognition and PR (13%)
6. Develop and Implement Appropriate Measurement and Evaluation Tools (11%)
Provide More Events and Opportunities for Employees (11%)
8. Increase Teambuilding Participation (9%)
Begin Tracking Employee Participation (9%)
Develop and Implement Employee Volunteer Councils Corporate-Wide (9%)
Get Employees to Report Their Hours/Service (9%)
12. Increase Employee Giving (Dollars for Doers/Matching Gifts) (6%)
Implement Annual Volunteer Event (6%)

(%) denotes the percentage of participants that provided this response

“We have a short-term set of objectives engaging business partners in our community efforts. For example, we have begun to set goals for each of our major service events regarding the number of business and non-profit partners we want to engage. At our Earth Day service event on April 22nd 2004, nearly three out of four volunteers of our over 4,300 volunteers globally did not actually work at Timberland. While business partners comprised only a small percentage of those non-Timberland volunteers, we nonetheless had a strategy to engage them. Going forward, we see our extended family of business partners as the next really big frontier for us. Connected with our strategic non-profit partners, they comprise an emerging virtuous circle of organizations committed to building value together – to produce and sell premium products and to offer communities real social impact that extends beyond the bottom line. To put this in perspective, if we only sought to volunteer in communities of places where our employees live and work, we’d be talking about activity in 20 or so countries. The larger network of companies representing the Timberland brand however – when you count distributors, sales agents, franchise partners and other supply chain partners – extends our activity to over 75 countries across the globe. Our partnerships extend our influence beyond the traditional boundaries. Our partners are asking for tools and know-how for ways to engage in meaningful community work. We have an obligation to help them take their ideas to scale.”

Patrick Kirby
Service Manager, Social Enterprise
The Timberland Company

“One of our short-term objectives is to develop measurements that can demonstrate the value of our volunteer program. While giving back to the community (both money and hours) is a key objective of the business, profitability is important as well, and every endeavor we undertake must provide benefits on both fronts.”

Saundra Knight
Program Manager, Community Relations
Sempra Energy

To continue to help “bridge the gap” and better explain the differences in the ways managers and executives view volunteerism, senior executives were also asked to, *“Please identify the goals and objectives you would like your CR/volunteer managers to focus on.”* Based on the limited amount of time with which to conduct senior management interviews, executives were not asked to differentiate between long-term goals and annual or short-term objectives. Furthermore, based on the interview information, most executives are not readily able to distinguish what they feel CR/volunteer managers should focus on over the long-term versus the short-term.

On average, senior executives have three to four goals/objectives in mind that they would like their CR/volunteer managers to focus on. While the following list represents the most popular of those goals and objectives:

- ✓ Over one-third of executives (38%) have no more than three goals for their programs
- ✓ Several executives do not have, nor want, any goals/objectives for their programs

“There shouldn’t be any goals associated with volunteerism – having specific goals and objectives for the program flies in the face of true volunteerism. Formal goals would dissuade employees from getting involved. The primary benefit for having and maintaining a volunteer program is not to benefit the Company, but the communities where our employees live and work, as well as our employees and the non-profit organizations they are involved with.”

Robert “Bob” Corcoran
Vice President, Corporate Citizenship
General Electric Company

LEADING VOLUNTEER GOALS AND OBJECTIVES – EXECUTIVES

1. Enhance Company's Image as a Good Corporate Citizen (38%)
2. Increase Employee Participation (34%)
3. Leverage Volunteerism for Leadership/Skills Development (31%)
4. Positively Impact Employee Pride and Morale (28%)
Foster Real, Meaningful Changes in the Community (28%)
6. Develop a More Strategically-Focused Volunteer Program (24%)
Enhance Relationships with Community Leaders/Government Officials (24%)
8. Increase Brand Awareness via Volunteerism (21%)
9. Generate Greater External Awareness and Recognition/PR (17%)
10. Quantify/Measure the Impact of the Program (10%)
Make Volunteer Experiences More Meaningful for Employees (10%)

(%) denotes the percentage of participants that provided this response

"One of the goals I would like to see our volunteer program achieve is to increase our 'civic infrastructure,' that is to inspire and motivate the entire community to get more active and involved in public/community service. Sprint is one of the largest employers in our region. If we can showcase our involvement, it will motivate others to get involved, particularly other companies."

Thomas Murphy, SVP
Communications & Brand Management
Sprint Corporation

WHAT'S INTERESTING TO KNOW...

Based on the research:

- ✓ 77% of CR/volunteer managers want to ***Increase Employee Participation*** either on an individual basis or through strategic group/teambuilding activities:
 - 53% see increasing employee participation exclusively as an annual objective
 - 33% see increasing employee participation as both as a long- and short-term objective
 - 14% feel increasing employee participation can only be achieved over the long-term
- ✓ The less successful CR/volunteer managers rate their programs, the more they feel the need to ***Increase Employee Participation***, thus further demonstrating the emphasis managers place on employee participation as an indicator of success

- ✓ The more successful CR/volunteer managers rate their programs, the less they feel the need to ***Increase Employee Participation*** and the more they want to focus on ***Increasing Brand Awareness***

Overall:

CR/volunteer managers and senior executives want their volunteer programs to achieve/focus on the same or similar goals and objectives.

When individual responses from CR/volunteer managers and senior executives are sorted and grouped into like categories – generating improvements/benefits for, or related to, the company, employees and the community – it is amazing just how similar managers’ and executives’ views and opinions are.

PRIORITIZING GOALS AND OBJECTIVES

CR/Volunteer Manager Responses

50% Company-focused
40% Employee-focused
10% Community-focused

Senior Executive Responses

49% Company-focused
40% Employee-focused
11% Community-focused

As highlighted above, ***both managers and executives place the greatest emphasis on improving operations and generating benefits for the company over both the long- and short-term.*** Examples include: *Enhancing Images as Good Corporate Citizens, Building Brand Awareness, Developing More Strategically-Focused Programs and Quantifying and Measuring the Impact of their Programs.*

In contrast, ***managers and executives place the least amount of emphasis on generating benefits for their communities over the long- and short-terms.*** This includes *Fostering Real, Meaningful Changes* and ultimately, *Making Communities Better Places to Live and Work.*

Increasing Employee Participation, Impacting Employee Pride and Morale and Making Volunteer Experiences More Meaningful – generating employee-relates benefits – are valued equally among managers and executives.

When the goals and objectives of CR/volunteer managers and senior executives are compared to the reasons why both believe their companies should support volunteerism, the following facts are uncovered:

- ✓ While generating community benefits (i.e., making communities better place to live and work) is one of the main reasons why managers and executives both feel their companies should support volunteerism, actually generating/achieving community benefits is not a huge priority (i.e., goal/objective) for either managers or executives
- ✓ Additionally, while both CR/volunteer managers and senior executives tend to downplay employee benefits as reasons why their companies should support volunteerism, employee-related goals/objectives are primary concerns for both managers and executives
- ✓ Furthermore, while managers and executives have mixed opinions on the company-related benefits that corporate volunteer programs may generate, both agree that securing those benefits, over both the long- and short-term, should be the primary goals/objectives of their volunteer programs

CONCLUSION

The goals of this chapter were to explain how companies define success, how companies currently rate the success of their programs, identify what companies feel it takes to build and maintain successful volunteer programs and highlight the goals/objectives companies are focusing on over the long- and short-term. By addressing these questions, it was surprising to learn that:

- ✓ Both CR/volunteer managers and senior executives currently consider their programs to be “Successful”
- ✓ Both CR/volunteer managers and senior executives define success in a similar manner – both base success, overwhelmingly, on employee participation, and to a lesser degree, on employee and community feedback
- ✓ Both CR/volunteer managers and senior executives want their programs to achieve/focus on the same or similar goals and objectives. Specifically, both place a high priority on seeing their companies benefit as a result of corporate volunteer programs, and a very low priority on generating community-related benefits.

The most important lesson to be learned from this chapter is that success is more than a “numbers game.” CR/volunteer managers, in addition to tracking and reporting the raw numbers associated with volunteerism (e.g., participation, hours, events, organizations, etc.), need to make a concerted effort to track, measure and report to executives, the impact events and activities have on communities, both in terms of outputs and outcomes. Furthermore, based on the advice and recommendations of their non-profit partners, and at the behest of senior executives, CR/volunteer managers need to spend more time soliciting employee and community feedback, as doing so will result in a more accurate indication of success.

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW...

- ✓ *First and foremost, the belief that senior management is a huge obstacle to the success of corporate volunteer programs is somewhat of a myth or stereotype. Based on the responses of those who participated in this study, senior executives and CR/volunteer managers not only consider their volunteerism program to be “Successful,” but they both define success in a very similar fashion.*
- ✓ *Due to the fact that the success of volunteer programs are based overwhelmingly on level employee participation, managers will need to place a significant emphasis on developing and implementing accurate and effective tracking, measurement and evaluation tools and techniques.*
- ✓ *Managers also need to accept the fact that success is more than a “numbers game.” Accurately evaluating the success of volunteer programs, as well as appeasing senior management, requires the active solicitation of employee and community feedback. Additionally, given the fact that managers and executives both place a high priority on how volunteerism impacts their corporate and brand reputations, managers also need to consider soliciting consumer and shareholder feedback.*
- ✓ *Based on executives’ and managers’ definitions of success, the five most important steps managers can take to ensure the success of their volunteer programs is to conduct and/or implement the following:*
 - *Active, On-Going Internal Communications*
 - *Employee-Friendly Programs and Practices*
 - *Dedicated Staffs, Budgets and Resources*
 - *Formal and Appropriate Structures*
 - *Measurement and Evaluation*
- ✓ *Managers need to also be aware of the fact that a significant portion of success also rests in their own hands. Managers’ own knowledge, skills, experience and capabilities impact the success of their volunteer programs. As such, managers should engage in continuous career education and training, as well as keep abreast of on-going trends and best practices.*

CHAPTER 3:

KEY COMPONENTS EXPLORED

OVERVIEW

In 2001, Community Relations (CR)/volunteer managers identified twelve key components that contributed to the success of their corporate volunteer programs. Based on CR/volunteer managers' responses at that time, we concluded that there was no "magic number" as to how many components were necessary to achieve success, but that ***the more comprehensive a program was, typically, the more successful it would be*** – successful in terms of generating employee participation, increasing awareness of the company as a "good corporate citizen" and garnishing senior management support.

As identified in the previous chapter, CR/volunteer managers continue to focus on the same or similar "key components" to ensure that their programs are successful. However, it is the underlying premise of this report that having or implementing one or more "key components" is not what makes one program more or less successful than the other, but how each company manages and manipulates those components as well. As such, the purposes of this chapter are to:

1. Highlight the current trends and practices associated with certain "key components"

2. Explore the appropriateness of various “key components” and what managers feel needs to be done differently
3. Demonstrate how various “key components” impact success

Specifically, this chapter addresses the following “key components” and how each contributes to the overall success of corporate volunteer programs:

- Program Structures
- Mission Statements
- Budget and Staffing Levels
- Measurement and Evaluation
- Employee Participation
- Senior Management Participation
- Board Service
- Work Release and Paid Leave Programs
- Communications and Education
- Recognition

When and where feasible, the chapter will also compare and contrast the views and opinions of CR/volunteer managers with those of senior executives, as well as the views and opinions of companies with their non-profit partners. Each section, in addition to highlighting “what’s interesting,” will also summarize for CR/volunteer managers “what they need to know.”

MEASURING IMPACT AND THE “I-VALUE”

In addition to comparing and contrasting managers’ and executives views and opinions based on how successful they feel their volunteer programs are, as indicated by their “S-scores,” this section of the report also compares and contrasts opposing viewpoints based on the degree to which managers and executives feel “key components” impact or influence the overall success of their programs. To accomplish this, during the course of their interviews, managers and executives were asked to rate on a scale from one to seven, the degree to which various “key components” impact the overall success of their programs with scores represented by the following:

IMPACT ON SUCCESS

- 7 = “Very Significant”
- 6 = “Significant”
- 5 = “Somewhat Significant”
- 4 = “Neutral”
- 3 = “Somewhat Insignificant”
- 2 = “Insignificant”
- 1 = “Completely Insignificant”

For the purposes of this study, significance or impact a participant rates a “key component’s” affect on their program’s overall success will be referred to as its “**I-value**” and will be represented throughout the report as (I=). The higher the I-value, the greater the impact a “key component” has on a volunteer program’s overall success.

PROGRAM STRUCTURES AND MISSION STATEMENTS

In the 2001 report on corporate volunteerism, how a volunteer program was organized – its **Program Structure** – was identified by CR/volunteer managers as a “key component” to the success of volunteer programs. Three years later, managers still consider **Program Structures** as a “key component” to success. As demonstrated previously in Chapter 2:

- ✓ Nearly half of all CR/volunteer managers (43%) consider **Formal and Appropriate Program Structures** as “key components” to success

PROGRAM STRUCTURES...

In general, there are four ways in which companies structure corporate volunteer programs:

- Company-directed (centralized)
- Employee-driven (decentralized)
- Third-party managed (outsourced)
- Hybrids (combination)

Regardless of which a company maintains, each structure type should help to establish the identity of the program, identify key players; assign specific duties and responsibilities, and define or outline the relationship each key player has with one another, namely those between employees and management, as well as corporate headquarters and regional/field offices.

Company-Directed Programs

Company-directed programs refer to those programs that are run almost exclusively by, or centralized within, a corporate department – the most common being the community relations department – with minimal employee involvement. In these types of programs, the community relations staff in each major facility is responsible for: identifying volunteer opportunities in their areas and communicating the information to employees; planning, organizing and managing local, company-sponsored volunteer activities; recruiting employees; tracking and measuring employee participation; and evaluating the impact of various events and activities. Often, companies that support these types of program structures organize only a handful of events a year – usually either one or two annual volunteer events (i.e., National Day of Caring) – or they maintain one or two year-long signature programs.

The minimal employee involvement, aside from the actual volunteering, usually involves employee coordinators, most commonly referred to as employee “champions” or “team leaders.” These employee coordinators or champions serve as communications conduits for the community relations department, helping to disseminate information on up-coming volunteer opportunities to employees. Employee coordinators may also be asked, on a limited basis, to help coordinate the day-of activities associated with annual volunteer events.

Based on the 2004 research:

- ✓ 91% of companies rely on **community relations (CR) teams** to help encourage, promote, coordinate and manage volunteers and volunteer events and activities at corporate headquarters
 - On average, managers from these companies consider their headquarters' volunteer programs "Successful" (S=5.79) and feel that the involvement of **CR teams** is "Significant" to this success (I=5.67)
- ✓ 62% of companies rely on **CR teams** to help encourage, promote, coordinate and manage volunteer and volunteer events and activities at local/field offices
 - On average, managers from these companies consider their local/field volunteer programs "Successful" (S=5.69) and feel that the utilization of local/field **CR personnel** "Significant" to this success (I=5.69)
- ✓ 21% of companies maintain purely **Company-Directed** programs

Employee-Driven Programs

At the opposite end of the spectrum lie employee-driven programs. In an employee-driven program, the company (community relations department) assumes a minor role in the planning, organization, management and execution of volunteer events and activities. Employees are typically empowered to do everything. On average, in an employee-driven program, a company/corporate department simply passes along or posts requests for volunteers it receives from community organizations; provides employee volunteers with t-shirts and minimal funds/equipment; and coordinates/sponsors some type of formal volunteer recognition program.

In an employee-driven program, there are typically very few, if any, policies or guidelines accept those associated with a monetary recognition/donation component, should one exist. Employees – as individuals or as a group – are typically given free range in terms of the types of events, activities and organizations with which they choose to involve themselves. Volunteer events, although not an absolute, are performed on employees' own personal time, with the exception of those activities done as a part of a departmental team building exercise.

Based on the 2004 research:

- ✓ 43% of companies rely on the efforts of **individual employees** to plan, organize and carry-out company-sponsored events and activities at corporate headquarters
 - On average, managers from these companies feel that their headquarters programs are "Successful" to "Highly Successful" (S=6.30) and feel that the utilization of **individual employees** at headquarters is "Significant" to this success (I=5.80)

- ✓ 55% of companies rely on the efforts of *individual employees* to plan, organize and carry-out company-sponsored events and activities at local/field offices
 - On average, managers from these companies consider volunteer programs in local/field offices “Successful” (S=5.85) and feel that the utilization of *individual volunteers* in local/field offices is “Significant” to this success (I=5.77)
- ✓ Less than five percent (5%) of companies maintain purely *Employee-Driven* programs

Third-Party Managed Programs

In a third-party managed program, the planning, organization, management and execution of the vast majority of volunteer events and activities are handled by an *external employee organization*. Typically, these are non-profit groups formed by employees and organized into local chapters. While the national or headquarters chapter may be run by a minimal paid staff, employee volunteers typically oversee the management of local chapters. To cover operational expenses, companies often provide grants and employees are often asked to pay annual membership dues. In short, companies that utilize external employee organizations “outsource” part or all of their volunteer programs. Examples of companies that maintain third-party managed programs are GE, via the GE Elfun, and many of the “baby Bells,” via the Telecom Pioneers of America.

Based on the 2004 research:

- ✓ 15% of companies rely on *external employee volunteer organizations* to plan, organize and manage volunteers and volunteer events/activities at corporate headquarters
 - On average, managers from these companies consider headquarters’ programs “Somewhat Successful” (S=5.43) and feel that relying on *external employee groups* is “Significant” to “Very Significant” to this success (I=6.29)
- ✓ 11% of companies rely on *external employee volunteer organizations* to plan, organize and manage volunteers and volunteer events/activities in local/field offices
 - On average, managers from these companies consider local/field volunteer programs “Successful” (S=5.60) and feel that relying on *external employee groups* is “Significant” to “Very Significant” to the success of local/field programs (I=6.20)
- ✓ Less than five percent (5%) of companies utilize purely *Third-Party Managed Programs*

Hybrid Programs

A hybrid program is a combination of company-sponsored and employee-driven programs. In a hybrid program, the company and employees share in the management of corporate volunteer activities. Most often, formal **employee volunteer councils/committees** are established and tasked with the responsibilities of planning, organizing, conducting and tracking day-to-day volunteer activities, as well as recruiting employees and recognizing volunteers in local offices. The company – typically via the CR department – supports councils/committees by providing guidance, funding, equipment and training, and oversees all marketing communications. Often, companies and employees jointly develop the policies and guidelines that govern the overall program, as well as any national, annual or signature events/programs.

“Our Corporate Relations department plans and oversees large-scale volunteer projects that are open to all associates on a local and/or national level. These initiatives/events allow associates the opportunity to contribute to their communities via financial contributions and/or volunteer (hands-on) support. Projects include: United Way campaign, United Way Day of Caring, March of Dimes, Food Drive, Christmas in October, KaBOOM! and Sprint Project Connect. Oftentimes, we recruit team leaders or chairs for these projects to whom we provide comprehensive training and communication/project support such as toolkits and templates. Reporting and the overall management for these projects are done by our department. We also do considerable community outreach and support through our Community Relations Teams (CRTs).

CRTs – groups of associates who serve their community through organized volunteer programs – are the cornerstones of Sprint’s employee volunteer program. CRTs are organized one within each building, and consist of a chair and a steering committee that plan, organize and run volunteer projects. Responsibilities of the CRT steering committee are to set the CRT mission and objectives, meet on a regular basis (usually monthly) to determine volunteer projects, organize and run the projects and report results/hours to Corporate Relations. A steering committee in areas with large concentrations of employees has an average of 10 – 15 members. For smaller locations, 5 – 8 members are adequate. Each chair attends a monthly meeting/conference call with corporate relations and organizes their own meetings with their CRT steering committee. Projects CRTs organize include corporate initiatives such as food drives, and ones that support the many needs of our local communities. CRTs motivate and encourage other associates in their building to get involved in their projects. There are 140 CRTs nationwide. The overall volunteer program is administered by the Corporate Relations department and a paid staff member manages the CRT program. Participation on a CRT is open to all Sprint employees.

Julie Hershey
Manager, Community Relations
Sprint Corporation

Based on the 2004 research:

- ✓ 38% of companies rely on **employee volunteer councils/committees** to encourage, promote and carry-out volunteer events/activities at corporate headquarters
 - On average, managers from these companies consider their headquarters' programs only "Somewhat Successful" (S=5.43) and feel that the use of **volunteer councils/committees** is "Somewhat Significant" to this success (I=5.47)
- ✓ 45% of companies rely on **employee volunteer councils/committees** to encourage, promote and carry-out volunteer events/activities at local/field offices
 - On average, managers from these companies consider local/field programs "Successful" (S=5.60) and feel that **volunteer councils/committees** are "Significant" to the success of local/field programs (I=5.71)
- ✓ 36% of companies maintain purely **Hybrid Programs**

Overall, managers believe that the way(s) their volunteer programs are currently structured/organized is "Significant" to the overall success of their volunteer programs (I=5.62).

PROGRAM STRUCTURES' IMPACT ON SUCCESS

23% "Very Significant"
 47% "Significant"
 6% "Somewhat Significant"
 15% "Neutral Impact"
 6% "Somewhat Insignificant"
 0% "Insignificant"
 2% "Completely Insignificant"

"The way our volunteer program is structured meets the diverse needs of our employees globally by taking work schedules, work life balance and personal interests into account and leveraging the benefits of technology."

Diane Melley
 On Demand Community Project Director
 IBM Corporation

During the course of the research, CR/volunteer managers were, however, asked whether or not the current structures of their volunteer programs are appropriate. Based on their responses:

- ✓ 77% of CR/volunteer managers believe the current structure(s) of their volunteer programs are ***APPROPRIATE***
 - On average, these managers consider their programs to be “Successful” (S=5.97) and rate their programs 15% more successful than their peers who feel current structures are inappropriate
- ✓ 23% of CR/volunteer managers feel the current structure(s) of their volunteer programs are ***INAPPROPRIATE***
 - On average, these managers consider their programs “Somewhat Successful” (S=5.18)

The chart below highlights the percentage of companies that utilize the various program structures broken-out by whether or not the CR/volunteer managers from those companies feel those structures are appropriate or not:

APPROPRIATE VS. INAPPROPRIATE PROGRAM STRUCTURES

<u>Structure</u>	<u>Utilization Rate Appropriate</u>	<u>Utilization Rate Inappropriate</u>
Corporate Departments	92%	91%
Volunteer Council/Committees	39%	27%
External Employee Groups	14%	18%
Individual Employees	50%	18%

There are two notable differences between CR/volunteer managers who feel current volunteer program structures are appropriate and those who feel they are inappropriate:

- ✓ Managers who feel current program structures are appropriate rely significantly ***MORE*** on ***individual employees*** and ***employee volunteer councils/committees*** to plan, organize and carry-out volunteer events and activities than managers who feel their program structures are inappropriate
- ✓ Managers who feel current program structures are appropriate also rely ***LESS*** on ***external employee volunteer organizations*** than their peers who feel current programs are inappropriate

“The existence of a volunteer council or team would help us to administer a comprehensive volunteer program with a significant number of opportunities that covers a great variety of interests. By having a diverse cross-section of employees actively participate in the selection of opportunities, we are sure to hear a number of views and by having a team of employees available to help run the activities, we can do more.”

Margot Cochran
Manager, Employee Programs
Altria Group, Inc.

VOLUNTEER MISSION STATEMENTS...

In 2001, and again in 2004, a significant number of CR/volunteer managers feel that one of the first steps companies need to take in creating and managing any successful program is to develop a volunteer mission or value statement.

In the post-Enron world, while a number of companies currently may include a commitment to community involvement or corporate citizenship in their list of corporate values, support for volunteerism is rarely mentioned. ***Corporate value statements that mention community involvement or corporate citizenship are not the same thing as volunteer mission statements.*** These companies need to go farther than simply stating that they believe in or support volunteers. If companies wish to establish and maintain a truly “formal” corporate volunteer program, then like any other “formal” business function, they need to develop a separate, comprehensive volunteer mission statement.

Companies should “set the stage” by defining how, and to what degree, they plan on encouraging, promoting and supporting their employees’ community service initiatives. Well-developed mission statements should try to accomplish three things: 1.) State why the company values volunteerism; 2.) Outline what the company sees as the benefits that will be generated for the community, employees and business, as a result of volunteering; and 3.) Suggest how the company will support employee volunteers.

Based on the 2004 research:

- ✓ 81% of companies ***DO NOT*** maintain a formal volunteer mission statement
- 55% of managers feel that their broader community relations statements are sufficient
- 42% of managers, however, believe a volunteer statement would be beneficial to the success of their overall programs. Over one-third (38%) feel that a volunteer statement would bring validation, direction and purpose to their programs.

- ✓ Only 19% of companies **DO** maintain separate and specific volunteer mission/value statements

“I think that having a formal mission statement on volunteerism helps employees at all levels know, very clearly, what the company's official view on volunteering is so that they can act appropriately.”

Margot Cochran
Manager, Employee Programs
Altria Group, Inc.

“Having a formal mission statement would allow us the opportunity to formally identify our company with a view on what it means to be a good corporate citizen in our local communities worldwide. While it might not focus on a particular cause or area, it will be a formal announcement on what volunteerism means to us as a company.”

Angela Woods
Manager, United Way & Volunteer Programs
American Express Company

WHAT'S INTERESTING TO KNOW...

Based on the research:

- ✓ The more successful managers consider their programs, the more frequently they rely on ***individual employees*** to plan, organize and carry-out volunteer events and activities
 - The smaller the company, the more frequently they rely on ***CR teams/departments*** and ***individual employees*** to plan, organize and carry-out volunteer events and activities
 - The larger the company, the more frequently it relies on ***employee volunteer councils/committees*** to plan, organize and carry-out volunteer events and activities
- ✓ 77% of companies with revenues over \$900M utilize ***individual employees*** to manage volunteerism in local/field offices versus 33% of companies with revenues under \$900M
- ✓ 22% of companies with revenues under \$900M do not maintain formal volunteer programs in local/field offices

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW...

- ✓ *In general, there are four structures that companies can utilize to organize their volunteer programs:*
 - *Company-directed (centralized)*
 - *Employee-driven (decentralized)*
 - *Third-party managed (outsourced)*
 - *Hybrids (combination)*
- ✓ *While choosing the appropriate program structure is important, especially for companies in the early stages of developing a corporate volunteer program, the research indicates that success varies only slightly among the different program types.*
- ✓ *Ultimately, however, the more companies encourage and support individual employees to not only volunteer, but get involved in planning, organizing and coordinating events/activities, the greater the likelihood that they will have a more successful program.*
- ✓ *Managers who feel current program structures are appropriate rely significantly more on individual employees and volunteer councils/committees to plan, organize and carry-out volunteer events and activities than managers who feel their program structures are inappropriate.*
- ✓ *To generate greater validation, direction, and purpose to their programs, managers should consider developing a separate, comprehensive volunteer mission statement which explains why the company values volunteerism. The volunteer mission statement should outline the benefits that will be generated for the community, employees and the company and detail how the company plans to support employee volunteers.*

VOLUNTEER STAFFS AND BUDGETS

Through the 2001 study, it was discovered that a formal volunteer program, like any other corporate function, requires that a company assign adequate personnel and allocate sufficient funds to successfully plan, promote, organize and conduct events and activities. Without a dedicated staff and/or budget, companies will find it challenging to maintain a successful volunteer program.

Three years later, in 2004, CR/volunteer managers still feel that a dedicated staff and budget are important to the overall success of corporate volunteer programs. In fact:

- ✓ Over half of all managers consider ***Dedicated Staffs and Budgets*** as “key components” to the success of their volunteer programs

“For a corporate volunteer program to be of high quality and sustainable, it should have on-going, committed resources behind it in the form of a budget, staffing and senior management commitment, just like any other community relations program.”

Paula Baker
Vice President & Director
IBM International Foundation

What the research also found is that:

- ✓ 100% of senior executives believe that their companies ***SHOULD*** establish a budget to support volunteerism
- ✓ 97% of senior executives also believe that their companies ***SHOULD*** have a dedicated staff to manage volunteerism, even if it is just one person

“A dedicated budget and staff is very significant to the success of any corporate volunteer program. Maintaining a dedicated budget sends a message that the company views volunteerism as a priority, and a dedicated staff serves as an invaluable resource for identifying volunteer opportunities and matching employees’ interests with organizations’ needs.”

Valerie Held
Vice President, Corporate Administration
UST, Inc.

BUDGETS LEVELS...

Corporate volunteer budgets, whether funded at the corporate or local level, are commonly used to cover the costs of t-shirts and other volunteer apparel, small recognition items (i.e., pens, pencils, key chains, coffee mugs, etc.), the printing of communications materials (i.e., flyers and brochures), food, limited transportation expenses and entrance fees associated with walks and runs. Major employee recognition items, however, such as community volunteer awards and Dollars For Doers grants, are funded through corporate foundation or contributions budgets. Furthermore, although uncommon, some corporate volunteer budgets also cover the costs associated with providing training to employees on volunteerism, particularly as it relates to non-profit board service.

Typically, companies calculate volunteer budgets by looking at what they are currently spending, and what they have historically spent, to support “x” number of volunteers and events during the course of a year. Unfortunately, however, a number of companies, regardless of the historical trends, allocate the same amount of funds for volunteer initiatives from one year to the next. Doing so makes it extremely difficult for the community relations departments and volunteer councils to increase employee participation and expand volunteer opportunities, much less successfully maintain either on a consistent basis.

At present:

- ✓ ***Every company with a minimum of 1,000 employees maintains a Dedicated Budget to support volunteer efforts at the local and/or corporate level.*** Typically, these funds are part of a larger community relations budget
 - 57% of companies maintain budgets at headquarters which cover both local and national volunteer-related expenses and initiatives
 - 23% of companies maintain independent budgets at local offices for local volunteer-related expenses, only
 - 10% of companies maintain budgets at headquarters for headquarters-related volunteer costs, only
 - 10% of companies maintain independent local budgets, as well as corporate volunteer budgets to cover national initiatives and supplement local expenses and activities
- ✓ ***On average, companies are budgeting \$12.16 per employee to support their volunteer programs, not just those who volunteer***
 - On average, companies are budgeting between \$0.24 and \$95.64 per employee to support their volunteer programs
 - Overall, corporate volunteer program budgets range between \$5K and \$1.5M

On average, senior executives believe dedicated budgets are, or should be, “Significant” to the overall success of a volunteer program (I=6.17) whereas CR/volunteer managers believe their current budgets are only “Somewhat Significant” (I=4.84) to the current success of their programs.

VOLUNTEER BUDGETS’ IMPACT ON SUCCESS

CR/Volunteer Managers

9% “Very Significant”
 32% “Significant”
 15% “Somewhat Significant”
 34% “Neutral Impact”
 11% “Somewhat Insignificant”

Senior Executives

55% “Very Significant”
 14% “Significant”
 21% “Somewhat Significant”
 7% “Neutral Impact”
 0% “Somewhat Insignificant”

Based on their responses, there is a very large discrepancy between managers and executives and their views on how current ***Budget Levels*** impact, or contribute to, the success of corporate volunteer programs. Overwhelmingly, executives believe that all volunteer programs need funding to be successful, even if the amount is minimal in comparison to other CR programs and activities. Managers, on the other hand, generally convey the feeling that employees will volunteer, and continue to volunteer, regardless of what the company chooses to spend.

“If you don’t have a budget for volunteerism, and at least a minimal number of staff dedicated to plan, organize and manage projects, then volunteerism doesn’t happen.”

Edward Cooney
 Vice President, Human Resources
 Federated Department Stores - Bon-Macy’s

✓ ***Overall, the more successful both CR managers and senior executives rate their programs, the greater the impact they feel dedicated budgets have on that success***

- On average, CR/volunteer managers who feel budgets are “Very Significant” (S=6.25) to the overall success of their programs, rate their programs:
 - 3% more successful than those who feel budgets are “Significant” (S=6.07)
 - 4% more successful than those who feel budgets are “Somewhat Significant” (S=6.00) and
 - 10% more successful than those who feel budgets have a “Neutral Impact” on success (S=5.00)

- On average, executives who feel budgets are “Very Significant” (S=6.25) to the success of their programs, rate their programs:
 - 14% more successful than those who feel budgets are “Significant” (S=5.50)
 - 16% more successful than those who feel budgets are “Somewhat Significant” (S=5.43) and
 - 25% more successful than those who feel budgets have a “Neutral Impact” on success (S=5.00)

During the course of the research, however, CR/volunteer managers were asked whether or not the current volunteer budgets are appropriate, and what, if anything, they would like to see done differently.

Based on managers’ responses:

- ✓ 64% believe current budget levels are *APPROPRIATE*
 - On average, these companies are budgeting \$13.65 per employee
 - The budget range for these companies is \$0.68 to \$95.64 per employee
- ✓ 34% believe current budget levels are *INAPPROPRIATE*
 - On average, these companies are budgeting \$7.61 per employee
 - The budget range for these companies is \$0.24 to \$34.44 per employee
 - *Ideally, these managers would like to see a 75% increase in their volunteer program budgets to \$10.61 per employee*

In the end, based on the responses of managers who feel current budget levels are appropriate and inappropriate, as well as the opinions of senior executives:

- ✓ *To achieve the level of success senior executives expect of volunteer programs, most companies will need to significantly increase current spending/budget levels for volunteer programs and initiatives.*
- ✓ *At a minimum, the IDEAL BUDGET LEVEL for a “Successful” volunteer program is \$12.34 per employee.*

STAFFING LEVELS...

The number of personnel companies assign to oversee volunteer programs is equally important, if not more so, than the amount of money they budget/spend. However, determining the exact number of people a company should have is more difficult than determining how much to spend. Similar to calculating volunteer budgets, companies often look at the size of their workforces to determine their staff sizes.

At present:

- ✓ ***48% of companies with 1,000 or more employees maintain at least one full-time equivalent (FTE) volunteer coordinator***
- ✓ ***On average, the companies in this study maintain 1 FTE volunteer coordinator per every 7,640 employees***
 - Volunteer staff levels/ratios range from 1 FTE coordinator per every 267 employees to 1 FTE coordinator per every 41,067 employees

In general, senior executives feel staffing levels are, or should be, “Significant” to the overall success (I=6.24) of volunteer programs, whereas CR/volunteer managers feel current staffing levels are only “Somewhat Significant” (I=4.78) to the overall success of corporate volunteer programs.

STAFFING LEVELS’ IMPACT ON SUCCESS

<u>CR/Volunteer Managers</u>	<u>Senior Executives</u>
4% “Very Significant”	55% “Very Significant”
36% “Significant”	24% “Significant”
19% “Somewhat Significant”	17% “Somewhat Significant”
19% “Neutral Impact”	0% “Neutral Impact”
13% “Somewhat Insignificant”	3% “Somewhat Insignificant”
9% “Insignificant”	0% “Insignificant”

Similar to ***Budget Levels***, there is a very large discrepancy between managers’ and executives’ views on how current ***Staffing Levels*** impact the success of volunteer programs. Overwhelmingly, executives feel the number of personnel assigned to manage volunteer programs directly impacts success. They also believe that current ***Staffing Levels*** are adequate enough to achieve the program’s goals and objectives. CR/volunteer managers, on the other hand, like ***Budget Levels***, feel that employees will volunteer regardless of how many people are assigned to manage volunteerism. However, most managers also believe that volunteer programs are significantly understaffed to meet senior management’s current expectations, much less increase the overall success.

“We’re fortunate at Timberland to have a dedicated staff to manage our community involvement – a necessity if you’re going to truly commit to making corporate citizenship an integral part of your core business strategy. It would be virtually impossible to maintain our level of commitment to community – which includes strategic partnerships, community investments, volunteer programs and both local and global service events – without having a team of employees solely focused on the goal.”

Bruce Johnson
SVP, Human Resources
The Timberland Company

During the course of the research, CR/volunteer managers were, however, asked whether or not the current staffing levels are appropriate or not, and what, they would like done differently.

Based on managers’ responses:

- ✓ 55% feel that current volunteer staffing levels are **APPROPRIATE**
 - On average, these companies maintain 1 FTE coordinator per every 5,518 employees
 - On average, managers from these companies rate their programs 7% more successful than their peers (S=5.96)
- ✓ 45% feel that current staffing levels are **INAPPROPRIATE**
 - On average, these companies maintain 1 FTE coordinator per every 9,964 employees
 - *Ideally, managers from these companies would like to see a 75% increase in staffing levels to have 1 FTE coordinator per every 6,242 employees*

In the end, based on the responses of both senior executives and CR/volunteer managers:

- ✓ *To achieve the level of success senior executives expect of volunteer programs, companies need to significantly increase the number of people assigned to manage volunteer programs and activities.*
- ✓ *At a minimum, the IDEAL STAFFING LEVEL for a “Successful” volunteer program is 1 FTE volunteer coordinator per every 5,837 employees.*

“Ideally, for a company of our size (47,600 employees), I would love to see ten people in Public Affairs assigned to handle community relations, contributions and volunteerism, exclusively.”

Lisa Huddleson
Manager
Dell Foundation

WHAT’S INTERESTING TO KNOW...

Budgets

- ✓ The more successful both CR/volunteer manager and senior executives consider their programs to be, the greater the impact dedicated budgets have on their views of success
- ✓ The more successful managers rate their programs, the less their companies tend to budget/spend to support volunteer activities
- ✓ The smaller the company, the more significant both CR/volunteer managers and senior executives feel that budgets impact the overall success of their programs
- ✓ However, the size of the company has little to do with whether or not managers feel budgets are “appropriate”
- ✓ Companies with less than 45,000 employees are out-spending companies with more than 45,000 employees, on average, \$2.25 to \$1.00 in terms of budgets
- ✓ As such, managers from companies with more than 45,000 employees reported that they would like to increase their budgets twice as much as managers from companies with fewer than 45,000

Staffing Levels

- ✓ There is a direct correlation between success and staffing levels, as well as between success and the impact staffing levels are believed to have

- ✓ Overwhelmingly, the lower/smaller the staff to employee ratio, the more successful managers rate their programs:
 - “Very Successful” programs have 1 FTE coordinator per every 5,212 employees
 - “Successful” programs have 1 FTE coordinator per every 5,940 employees
 - “Somewhat Successful” have 1 FTE coordinator per every 7,663 employees
- ✓ The more successful both CR/volunteer managers and senior rate their programs, the more significant they feel staffing levels are to the success
- ✓ The larger the company, the more significant CR/volunteer managers feel staffing levels are to the overall success of their programs, while the smaller the company, the more significant senior executives feel staffing levels are to success
- ✓ In the end, the smaller the company, the “better”/smaller the staff to employee ratios means larger companies need to hire and/or assign more personnel to manage volunteerism if they want to have and/or maintain “Successful” programs

“Maintaining and supporting a dedicated staff is an effective mechanism to keep the program focused and helps demonstrate our commitment to volunteerism and to giving back to the communities where our employees live and work.”

Thomas Murphy, SVP
Communications & Brand Management
Sprint Corporation

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW...

- ✓ *Adequate staffing and budget levels are significant to the success of every corporate volunteer program.*
- ✓ *Research shows that there is a direct correlation between staffing levels and the success of corporate volunteer programs.*
- ✓ *To achieve the level of success senior executives expect of volunteer programs, companies need to significantly increase the number of people assigned to manage volunteer programs and activities.*
- ✓ *Ideally, companies with at least 1,000 employees should maintain at least 1 FTE coordinator/manager to oversee volunteer programs, events and activities.*
- ✓ *The ideal staff to employee ratio for a “Successful” volunteer program is 1 FTE volunteer coordinator per every 5,837 employees.*
- ✓ *Dedicated volunteer budgets are significant to the success of volunteer programs, but slightly less so than staffing levels.*
- ✓ *To achieve the level of success senior executives expect of volunteer programs, most companies will need to significantly increase current spending/budget levels for volunteer programs and initiatives.*
- ✓ *Ideally, companies with at least 1,000 employees should budget approximately \$12.34 per every employee, not just those that volunteer, in order to have and/or maintain a “Successful” volunteer program.*
- ✓ *Senior executives, on average, feel dedicated volunteer staffs and budgets are more significant to the success of volunteer programs than CR/volunteers managers do, but senior executives tend to also feel that current staffing and budget levels are sufficient to achieve current goals and objectives.*
- ✓ *As such, CR/volunteer managers who feel current staffing and/or budget levels are inadequate need to do a better job on conveying their need(s) to senior management. Two possible ways to influence senior management that current staffing and/or budget level are inadequate are to benchmark what peers and competitors have, and to share the findings from this report.*

MEASUREMENT AND EVALUATION

Measurement and evaluation, in addition to determining the success/impact of specific volunteer events/activities, also involves the tracking of employee participation, as well as the solicitation of employee, community and management feedback. As highlighted in Chapter 2, measurement and evaluation can be done on an informal and/or formal basis, is considered by CR/volunteer managers and senior executives alike, to be one of the most significant components to the success of a corporate volunteer program.

In addition to being one of the most popular topics on interest, measurement and evaluation has also become a hot-bed of debate, especially with regard to volunteerism. While many corporate community relations professionals recognize the benefits that can be derived from tracking, measuring and evaluating employee participation in volunteer events and activities, many are often hesitant to do so, claiming that this violates both the philanthropic spirit of volunteerism and employees' right to privacy. Others are cautious about the repercussions.

“Measuring and evaluating volunteer programs and activities resulted in a reduction in the staff and resources devoted to this area.”

George Rogers
Chairman, Memphis VIP Team
International Paper

All in all, however,

- ✓ ***Both CR/volunteer managers and senior executives agree that Measurement and Evaluation is key to the success of their volunteer programs***

TRACKING EMPLOYEE PARTICIPATION...

The first thing companies should ask themselves when evaluating their programs is not “How are we doing,” but rather “What are we doing.” Companies need to know such things as how many employees are volunteering, how often they are volunteering and with what types of organizations. As noted earlier:

- ✓ ***88% of CR/volunteer managers and 66% of senior executives consider Employee Participation as the primary measure of success***

Based on CR/volunteer managers' feedback:

- ✓ 87% of companies **DO TRACK** employee participation/volunteerism (S=5.73)
 - 10% of these companies track employee participation through Dollars for Doers grant applications, only
- ✓ 13% of companies **DO NOT TRACK** employee participation/volunteerism (S= 6.17)
 - All of these companies base the success of their programs on the level of employee participation, yet none track participation

Although CR/volunteer managers who do not track employee participation rate their programs 8% more successful than their peers who do track employee participation, they have no sound basis with which to do so. At best, these managers base the success of their programs on intuition.

What Data/Information Companies Track

During the course of the interviews, CR/volunteer managers were asked to, *“Please indicate what types of information, if any, you collect for individual company-sponsored events.”* The following represents the most popular of their responses:

MOST COMMONLY TRACKED DATA/INFORMATION

1. Total Number of Employee Volunteers (95%)
2. Names of Organizations Where Employees Volunteer (88%)
Types of Organizations Where Employees Volunteer (88%)
4. Total Hours Served by All Employees (85%)
5. Number of Individual/Unique Employees (80%)
6. Types of Activities/Services Performed by Employees (76%)
7. Number of Hours Served by Individual Employees (63%)
8. Results/Outcomes of Events/Activities (63%)
Purpose of Events/Activities (56%)
10. Resources Given to Support Employees (51%)
11. Number of Media Hits (41%)
12. Types of Skills Used/Practiced by Employees (17%)

(%) denotes the percentage of participants that provided this response

Based on their responses, managers that track the following pieces of data/information consider their volunteer programs to be 8% - 46% ***MORE SUCCESSFUL*** than the volunteer programs of their peers who do not track the same pieces of data/information.

- ✓ Total Number of Employee Volunteers = 46% more successful
- ✓ Total Hours Served by All Employees = 22% more successful
- ✓ Number of Individual/Unique Employees = 11% more successful
- ✓ Types of Activities/Services Performed by Employees = 11% more successful
- ✓ Number of Hours Served by Individual Employees = 10% more successful
- ✓ Types of Skills Used/Practiced by Employees = 8% more successful

How Companies Track Employee Participation

There are typically four ways in which companies collect data and information on employee participation: funneling data/information up from local offices to corporate Headquarters, through the use of an in-house, on-line tracking system, utilizing a third-party vendor such as VolunteerMatch, AngelPoints, JK Group, etc., and employing the tireless efforts of the corporate community relations (CR) staff at Headquarters.

Specifically:

- ✓ Nearly half of all of the companies (49%) utilize a ***formal/standard tool*** to track and collect information on employee participation
 - 49% funnel information from local offices to corporate headquarters, only (S=5.70)
 - 15% funnel information from local offices to corporate headquarters *AND* utilize an in-house, on-line tracking system (S=5.67)
 - 12% rely on the corporate CR staff at headquarters, exclusively (S=6.20)
 - 7% utilize a third-party vendor, exclusively (S=6.33)
 - 7% rely on the corporate CR staff *AND* utilize an on-line tracking system (S=6.33)
 - 5% utilize an in-house, on-line tracking system, exclusively (S=5.00)
 - 2% rely on the corporate CR staff *AND* a third-party vendor (S=5.00)
 - 2% funnel information from local offices to corporate headquarters, utilize an on-line tracking system and utilize a third-party vendor to track volunteerism (S=5.00)
- ✓ ***Managers from companies that utilize standardized tools to track employee participation rate their programs 6% more successful than managers who do not***

Why Companies Track Employee Participation

In addition to simply gauging the success of their programs, companies track employee participation because it provides a number of value-added benefits:

TOP 10 USES/BENEFITS OF TRACKING VOLUNTEERISM

1. Helps Tweak/Improve Program
2. Helps Recruit and Retain Employee Volunteers
3. Generates Senior Management Buy-In and Support
4. Generates PR for Company via Media Relations
5. Justifies Program Budget and Secures Additional Resources
6. Aids in the Recognition of Employee Volunteers
7. Benchmarks Against Goals and Objectives
8. Enhances Company's Image as Good Corporate Citizen
9. Provides Information for the Annual Report
10. Provides Information for Executive Communications

CR/volunteer managers also report tracking and collecting data and information on employee participation because doing so:

- Helps identify best practices
- Generates buy-in and support from middle management
- Is useful when applying for awards/"best company" lists
- Helps focus/guide corporate giving
- Helps justify and determine the overall CR budget

Helps Recruit and Retain Employee Volunteers. One of the greatest benefits CR/volunteer managers see as a result of tracking employee participation is the ability to recruit new volunteers and retain the ones they already have. By sharing the number of employees that volunteer, how many hours they serve and the organizations they volunteer with, managers report they are able to positively impact employee pride and morale, effectively encourage/motivate employees to get involved, and better retain those who are already active.

Generates PR for Company via Media Relations. Simply put, being able to issue a press release or mention to a reporter the number of employees who volunteer, the number of hours they serve and the names/number of organizations they assist, can generate a tremendous amount of positive exposure and publicity for a company and its brand(s).

Benchmarks Against Goals and Objectives. As noted in the previous chapter, the number one long-term goal and annual/short-term objective of CR/volunteer managers is to increase employee participation. Unless a company is able to successfully and accurately track participation, it will have no way to tell with any certainty whether or not it succeeded in achieving any goals or objectives.

Justifies Program Budget and Secures Additional Resources. Tracking employee participation and sharing it with senior management helps to *Generate Senior Management Buy-in and Support*, especially since employee participation is one of the top two factors senior executives use to determine success. However, in addition to generating buy-in and support, CR/volunteer managers report that tracking and sharing data/information with senior management helps justify their volunteer budgets and secures additional resources, both in terms of funding and staffing.

Annual Reports and Executive Communications. By including track data in the company's annual report and in executive communications, CR/volunteer managers can impact investor and stakeholder relations, as well as generate good PR and enhance the corporate image.

Reporting Employee Participation

CR/volunteer managers were also asked whether or not they share information with senior management and if so, how often. Overall:

- ✓ 76% of those companies which track employee participation **DO SHARE** the information with senior management (S=5.84)
 - *Managers from these companies consider their programs 7% more successful than their peers who do not share information with senior management*
 - Over half of these managers are required by senior management to report/share data/information on their programs and employee participation
- ✓ 27% of those companies which track employee participation **DO NOT SHARE** the information with senior management (S=5.45)
 - 45% of these companies employ fewer than 12,000 people
 - 36% of these companies employ more than 110,000 people

Furthermore, the research also demonstrates that:

- ✓ *The more frequently CR/volunteer managers share information on employee participation with senior management, the more successful they consider their programs to be:*
 - 45% report information *Annually* (S=5.71)
 - 32% report information *Quarterly* (S=5.90)
 - 6% report information *Semi-Annually* (S=6.00)
 - 6% report information *Monthly, Quarterly and Annually* (S=6.00)
 - 3% report information *Monthly* (S=6.00)
 - 3% report information *3 Times Per Year* (S=6.00)
 - 3% report information both *Quarterly and Annually* (S=6.00)

✓ *The more data/information CR/volunteer managers share with senior management, the more successful they consider their programs to be:*

- 58% of managers share with senior management all the data/information they track (S=6.06) and consider their programs 9% more successful than their peers (42%) who only report select pieces of data/information to senior management (S=5.54)

MEASURING AND EVALUATING EVENTS AND ACTIVITIES...

Along with tracking volunteer participation, companies evaluate the impact/success events and activities are having. While tracking volunteer participation examines inputs and outputs – what goes into the program and what is produced by it – measuring and evaluating specific events and activities looks at the outcomes that volunteering has had on the employees, the company and the non-profit and/or their clients. In general, there are two types of evaluations that companies can undertake:

Formal Evaluations – the collection of data/feedback on a regular basis via formal scientific tools, such as surveys, questionnaires, focus groups, etc.

Informal Evaluations – the collection of anecdotal feedback or data/feedback on an ad hoc basis. The most common type of informal evaluation is the collection of stories and comments made by employees and recipients regarding how much they either enjoyed or benefited from volunteering.

In terms of formally measuring and evaluating events and activities:

- ✓ 53% of companies **DO NOT** measure or evaluate the impact of company-sponsored events/activities
 - Nearly one-third of CR/volunteer managers from these companies (28%) identified **Measurement and Evaluation** as a “key component” of a successful volunteer program – this represents one –out –of –every six companies
 - 12% of these managers base the success of their overall programs on the impact or success of individual events/activities, yet do not measure or evaluate them
- ✓ 47% of companies, however, **DO** formally measure and evaluate company-sponsored events/activities
 - CR/volunteer managers from these companies consider their programs 4% more successful than their peers from companies that do not measure and/or evaluate volunteer events/activities

It is assumed that except for the largest corporations, most companies do not have the resources – in terms of money, staff, experience and time – needed to properly measure and evaluate the results/impact of their programs. However, as the research clearly shows:

✓ ***Current volunteer budget levels have little to no bearing on whether or not companies are measuring and/or evaluating the success or impact of their programs***

- 68% of CR/volunteer managers who do not measure and evaluate company-sponsored events/activities feel current volunteer budgets are appropriate
- 55% managers who do measure and evaluate company-sponsored events/activities feel current volunteer budgets are appropriate

✓ ***Current volunteer staffing levels also have little to no bearing on whether or not companies are measuring and/or evaluating the success or impact of their programs***

- 64% of CR/volunteer managers who do not measure and evaluate events/activities feel that current staffing levels are appropriate
- 50% of managers who do measure and evaluate events/activities feel that their staffing levels are appropriate

In short, since the overwhelming majority managers who do not measure/evaluate volunteer events/activities feel current budget and staffing levels are appropriate AND that close to half of the managers who do measure/evaluate volunteer events/activities feel current staffing and budget levels are inappropriate, it can be inferred that budget and/or staffing levels have little to do with whether or not managers choose to measure/evaluate volunteer events/activities.

Given the fact that two-thirds of managers who do not measure or evaluate their companies' events and activities feel volunteer budget and staffing levels are appropriate AND that 38% consider measurement and evaluation a “key component” of success, it can be stated with a high level of certainty that:

✓ ***The majority of CR/volunteer managers do not measure and/or evaluate volunteer events/activities either because they lack the knowledge and/or experience to do so***

When asked how they formally measure and evaluate the impact/success of company-sponsored events and activities, CR/volunteer managers identified the following as the most commonly used measurement and evaluation tools and techniques:

LEADING MEASUREMENT AND EVALUATION TOOLS

1. Post-Event Focus Groups/Wrap-Up Sessions
2. Annual Employee Volunteer Surveys
3. Program-Specific Evaluations
4. Informal Employee Interviews
5. Annual Volunteer Event Surveys
6. Non-Profit Surveys/Interviews
7. On-Line Evaluation Forms

When formally measuring and evaluating events and activities:

- ✓ 59% of these managers *randomly choose the criteria* which are used to measure and/or evaluate the impact/success of separate company-sponsored events and activities
- ✓ 41% of these managers utilize a *formal/standard tool and set of criteria* to accurately measure and evaluate each and every event and activity (S=6.11)
 - Managers which utilize a formal/standard measurement tool rate their programs 3% more successful than those who do not use formal/standard measurement tools, and 8% more successful than those who simply do not measure/evaluate company-sponsored events and activities

Post-Event Focus Groups/Wrap-Up Sessions. CR/volunteer managers most readily measure and evaluate company-sponsored events/activities through the utilization of volunteer focus groups/wrap-up sessions immediately following the event/activity – “immediately following” meaning anytime up to two weeks after the event/activity. Focus groups typically include the project coordinator, CR/volunteer manager and a handful of the volunteers that participated in the event. Focus groups, as opposed to surveys, allow more detailed information to be collected in a shorter period of time, albeit from a smaller group of people.

Program-Specific Evaluations. Over the past decade, volunteerism has become very specialized, particularly with the increase in tutoring/mentoring programs and board service, and the need for volunteers with particular skill sets/expertise. As such, more and more managers have begun to custom-tailor research tools that measure and evaluate specific program outcomes based on a set of criteria, as well as goals and objectives, specific to those programs.

Annual Volunteer Event Surveys. Due to the amount of time and resources that go into planning, organizing and executing annual volunteer events, a significant portion of CR/volunteer managers are highly interested in measuring and evaluating the success/impact of these events. CR/volunteer managers also focus on measuring and evaluating annual volunteer events due to the large employee turn-out that they generate – more volunteers there are the more feedback managers are likely to collect/receive.

Non-Profit Surveys/Interviews. A smaller percentage of managers measure and evaluate the impact and/or success of company-sponsored events/activities by collecting data and information directly from non-profit partners through surveys, as well as face-to-face and telephone interviews.

On-Line Evaluation Forms. Either in-place of, or in addition to, traditional paper surveys, a smaller, but growing portion of CR/volunteer managers are turning to on-line, electronic surveys and evaluation forms to collect, measure and evaluate employee participation and feedback. Electronic, on-line surveys and evaluation forms save CR/volunteer managers time and money, and allow for greater flexibility in the questions they can ask and the responses the volunteer can provide.

Ultimately, CR/volunteer managers were asked whether or not sharing the information gleaned from measuring and evaluating events and activities helps them to demonstrate the value of their programs and generate greater buy-in and support from senior management.

Based on the responses:

- ✓ 55% of CR/volunteer managers who measure and evaluate their events/activities use the information to successfully demonstrate the value of their overall programs to senior management (S=5.67)

“As a result of tracking employee participation/volunteerism, the numbers, among other things, have helped to broaden senior management’s view on the value and impact of volunteerism and community relations, and persuade them to dedicate more money, people, time and resources.”

Allyson Peerman
Director, Community Affairs
Advanced Micro Devices (AMD)

- ✓ 45% of CR/volunteer managers who measure and evaluate volunteer events/activities do not use the information to demonstrate the value of their overall programs to senior management, but rate their programs 9% more successful than the programs of their peers (S=6.20)

While senior executives want to know the results and impact of volunteer events/activities, it is unclear from the research why managers who do not use measurement and evaluation results rate their programs more successful than their peers who do share this information. The most plausible reasons are: 1.) the results managers are using to demonstrate value to senior management are not very good; 2.) managers who use measurement/evaluation results to demonstrate value to senior management are not sharing the right information; or 3.) managers who use measurement/evaluation results to demonstrate value to senior management base the success of their programs on other issues.

SOLICITING EMPLOYEE AND COMMUNITY FEEDBACK...

As indicated by both CR/volunteer managers and senior executives in the previous chapter, ***Soliciting Employee and Community Feedback is critical to determining the success of corporate volunteer programs.***

Through the solicitation of employee feedback, companies learn about employees' views on volunteering, what issues/causes they feel are important, what types of organizations or initiatives they currently support or would like to support, and how they would like to see the company get involved. Knowing what employees' value is key to planning volunteer events and activities, choosing appropriate non-profit partners, and developing a strategic program. Through the solicitation of employee feedback, companies can also learn what employees specifically like or dislike about a particular event or activity, or about the overall program, what prevents employees from volunteering or volunteering more, and what the company can do to increase or entice more employees to volunteer, particularly in company-sponsored events and activities.

Similarly, through the solicitation of community feedback, companies learn what issues/causes are important to various community groups and how they feel the company can help. Knowing what the community values is key in determining how, and to what degree, the company should respond, and what role volunteers can play. Through the solicitation of community feedback, particularly through the utilization of community attitude assessments, companies also learn how various groups view them, what these groups feel they can and/or should do differently, and whether or not the companies' efforts actually make a difference.

Employee Feedback

Overall:

- ✓ 60% of companies **FORMALLY** solicit employee feedback (S=5.89)
 - Managers from these companies rate their programs 7% more successful than the programs of their peers who do not solicit employee feedback
 - Managers from these companies rate their programs 6% more successful than the programs of their peers who only passively accept/track employee feedback
- ✓ 23% of companies **INFORMALLY** solicit employee feedback (S=5.73)
- ✓ 17% of companies **DO NOT** solicit employee feedback on volunteerism (S=5.50)
 - 38% of these managers rate the success of their programs based on the *Degree of Employee Feedback*, but do not solicit it (S=4.80)
 - 13% of these managers feel *Soliciting Employee Feedback* is a “key component” of a successful volunteer program, but do not solicit it

When formally soliciting employee feedback:

- ✓ 72% of companies utilize a **formal tool/mechanism** to collect employees’ thoughts, views and opinions (S=5.93)
 - Managers from these companies rate their programs:
 - 1% more successful than managers who do not use formal collection tools
 - 3% more successful than managers who collect feedback informally
 - 8% more successful than managers who do not solicit employee feedback

When asked how they solicit employee feedback, CR/volunteer managers identified the following as the most commonly used tools and techniques to gather employee feedback:

TOP 10 EMPLOYEE FEEDBACK TOOLS AND TECHNIQUES

1. Annual Employee Survey
2. Event/Project Questionnaires
3. Informal, Word-of-Mouth Interviews
4. On-Line Surveys/Feedback Forms
5. Employee Focus Groups
6. Informal, But Targeted E-mails
7. Annual Volunteer Event Questionnaires
8. Dollars for Doers Applications
9. Informal Phone Calls/Interviews
10. 800# / Employee Hotline

During the course of the research, managers were also asked, “*How often does your company solicit employee feedback?*” Based on managers’ responses:

✓ ***The more frequently companies solicit employee feedback, the more successful CR/volunteer managers feel their volunteer programs are:***

- 42% solicit employee feedback on an *as-needed/random basis* (S=5.67)
- 30% solicit employee feedback on an *annual basis* (S=5.81)
- 27% solicit employee feedback on an *on-going/regular basis* (S=5.89)

By formally and informally soliciting employee feedback, CR/volunteer managers have learned the following lessons about their volunteers:

TOP 10 LESSONS LEARNED THROUGH SOLICITING EMPLOYEE FEEDBACK

1. Volunteerism positively impacts employee morale and elevates employees’ pride, especially for companies which actively support their efforts.
2. Managers learn what employees like, as well as what they dislike or would like to see done differently, especially in terms of the organizations they volunteer with, which helps to ensure that future events and activities are planned appropriately.
3. Employees prefer/enjoy to volunteer with friends and family members, as well as in/with teams of their co-workers.
4. Volunteering needs to be made easy. As such, not only is proper planning and logistics critical to success, but the less paperwork employees have to complete, the better.
5. Employees like/appreciate being recognized for their efforts. They especially like/appreciate Dollars for Doers programs.
6. Employees would volunteer more often if they had the time. As such, employees desire to volunteer during the workday and like the idea of paid time-off to volunteer.
7. Employees want to be provided with a greater variety of volunteer events and activities from which to choose to participate in.
8. Employees want to be provided training for various types of volunteer activities, such as tutoring and board service, as well as how to plan and organize their own events.
9. When employees show up to a volunteer event, they want to be put to work right away; they dislike wasting time.
10. Employees want to see senior management role up their sleeves and get their hands dirty. In other words, employees want to see senior management volunteer alongside them.

Soliciting Community Feedback

Overall:

- ✓ 55% of companies **DO** actively solicit community feedback (S=5.96)
 - *Managers that solicit community feedback rate their programs 7% more successful than their peers who do not*
 - 62% of these managers **INFORMALLY** solicit community feedback (S=5.88)
 - 38% of these managers **FORMALLY** solicit community feedback through the use of a formal data collection tool/mechanism (S=6.00)
 - Managers that formally solicit community feedback rate their programs:
 - 2% more successful than their peers who informally solicit community feedback
 - 8% more successful than their peers who do not solicit community feedback at all
- ✓ 45% of companies **DO NOT** actively solicit community feedback (S=5.57)
 - 14% of these managers base the success of their programs, in part, on the *Degree of Community Feedback*, but do not solicit employee feedback
 - 14% of these managers consider *Incorporating Community Needs* as a “key component” to success, yet do not solicit community feedback
 - The 5% of managers that consider *Soliciting Community Feedback* as a “key component” to success, do not solicit it

Generating Senior Management Buy-in and Support

Ultimately, CR/volunteer managers were asked whether or not sharing employee and/or community feedback helps them to demonstrate the value of their programs and generate greater buy-in and support from senior management.

Based on the responses:

- ✓ 59% of managers that solicit employee feedback are able to demonstrate value to senior management by sharing this information (S=6.00)
 - Managers from these companies rate their programs:
 - 3% more successful than their peers who do not share employee feedback with senior management
 - 9% more successful than their peers who do not solicit employee feedback, period

- ✓ 41% of managers **DO NOT** share employee feedback with senior management and subsequently have not been able to use this information to generate greater buy-in and support

“As a result of soliciting employee/volunteer feedback, we have discovered that employees: want to see volunteerism made easy; like activities which provide a direct benefit to clients (people); prefer tangible, hands-on projects and activities, like a Habitat build; really enjoy volunteering with friends and family members; and truly appreciate and enjoy working for AMD because of company’s commitment to volunteerism/community.”

Allyson Peerman
Director, Community Affairs
Advanced Micro Devices (AMD)

Furthermore:

- ✓ 69% of CR/volunteer managers who solicit community feedback have successfully used the information to demonstrate value to senior management (S=6.22)
- ✓ 31% of CR/volunteer managers who solicit community feedback have not shared the information with senior management, and subsequently have not been able generate additional buy-in and support from senior management (S=6.26)

Although senior executives would like to know what the community thinks and feels about their companies’ volunteer programs, based on the research results, it is unclear whether sharing this information may actually lead to greater buy-in and support from them or impact the success of a volunteer program.

WHAT SENIOR MANAGEMENT WANTS TO KNOW...

While the overwhelming majority of CR/volunteer managers may feel they are doing a good job tracking information on volunteerism, including soliciting employee and community feedback, and sharing the information with senior management:

- ✓ ***79% of senior executives report that they would like considerably more information on various aspects of volunteerism than what they are currently receiving***

CR/volunteer managers would have known that senior management is not happy with their tracking, measurement and evaluation techniques if they had only asked them. But, as the research demonstrates:

- ✓ No CR/volunteer manager considers ***Soliciting Senior Management*** as a “key component” to a successful volunteer program
- ✓ Only 38% of managers ***ATTEMPT*** to solicit senior management’s thoughts, views and opinions on volunteerism (S= 5.83)
 - Two-thirds of these managers (67%) solicit senior management feedback ***INFORMALLY***
 - The majority of managers do so on a quarterly basis, typically at the quarterly foundation board meetings

By formally and informally soliciting senior management feedback, CR/volunteer managers have learned the level of senior management participation, that senior management values employee engagement, and that senior management appreciates hearing employees’ concerns and what they feel is important.

“As a result of soliciting senior management’s thoughts and opinions on volunteerism, we learned: that senior management is happy with, and supportive of, the level of employee volunteerism; that they see volunteerism as something good for the Company; that they believe volunteerism is inherently beneficial to employees; that they feel volunteerism is a great opportunity for them to get involved in the headquarters community, especially given the amount of travel they do; that senior managers love the ability to interact with employees through volunteer projects; and that senior management appreciates the feedback they get from community groups.”

Mary Roney
Manager, Global Employee Involvement
Nike, Inc.

During the course of the interviews, senior executives were asked to, “*Please list the data/information you would like the community relations staff to collect and present to you regarding volunteerism.*” The executives identified 22 unique pieces of data/information they would like their CR staffs to collect and share with them regarding volunteerism. On average, executives identified four specific pieces of data/information they would like to know, the most common of which are listed below.

WHAT SENIOR MANAGEMENT WANTS TO KNOW

1. Total Number of Individual/Unique Volunteers (48%)
2. Employee Feedback (41%)
Types of Organizations, Activities and Level of Involvement (41%)
4. Employee Participation Broken-Out by Regional/Business Unit (34%)
5. Total Number of Hours Served by All Employees (31%)
6. Community Feedback (21%)
7. Individual Post-Event Evaluations (17%)
- 8 Volunteer-Related Corporate Contributions (14%)
Volunteer-Inspired/Related Employee Giving (14%)
What Peers/Competitors are Doing/Benchmarking (14%)

(%) denotes the percentage of participants that provided this response

Less than 10% of senior executives also commented that they would like their CR/volunteer managers to report on:

- The actual metrics used to track, measure and evaluate employee participation
- The number of hours employees volunteer on their own in non-company events
- Yearly trends/changes in annual volunteer event participation (i.e. Days of Caring)
- Senior management participation rates and details
- Statistics on external recognition, awards, and PR
- Impact on community groups in terms of service delivery and capacity building
- Participation in e-mentoring and on-line volunteer programs
- Socio-graphics and demographics of volunteers
- Retiree participation rates
- How volunteering impacts employees’ skills/leadership development
- How volunteerism impacts employee recruitment and retention

Employee Feedback. Senior management not only wants to know how many employees volunteer and the number of hours they serve, but they are equally interested in knowing how much employees enjoy their experiences, what they get out of volunteering, what they learn (skills/professional development), and what the company can do to better support them. Preferably, senior executives would like analytical as opposed to anecdotal feedback.

Types of Organizations, Types Activities and Level of Involvement. While the majority of CR/volunteer managers already track the *Types of Organizations* (88%) and *Types of Activities* (76%) employees are involved in, senior executives feel that CR/volunteer managers can do a better job sharing this information. Furthermore, senior executives would also like to know the *Level of Employees' Involvement*. Which/how many employees are involved in planning/managing events and activities? Which/how many employees serve on non-profit boards? Which/how many employees are taking leadership positions with non-profits or in the community? These are just a few examples of what executives mean by *Level of Involvement*.

Regional/Business Unit Participation/Volunteerism. When CR/volunteer managers report the data/information they have tracked and collected on volunteerism, over one-third of executives (34%) acknowledge that they would like the statistics broken out, when and where possible, regionally and/or by business unit. To senior executives, this information is most useful in determining which of their peers, and or subordinate managers “aren’t pulling their own weight” so they know who to cajole.

“I’d like to know which managers, senior managers, division heads and executives do not get involved.”

Edward Cooney
Vice President, Human Resources
Federated Department Stores/Bon-Macy’s

Community Feedback. One-in-five senior executives (21%) are extremely interested in knowing what the community’s needs and concerns are, what role the community sees the company playing to address those needs, and, overall, how the company is perceived as a good corporate citizen. In particular, these executives would like their CR teams to conduct “community attitude assessments,” preferably on an annual basis, with specific reference to volunteerism. In short, a community attitude assessment is an assessment of how various segments of the community (i.e., business leaders, elected officials, community leaders, non-profit leaders, consumer groups, the media, etc.) feel about the questions posed above.

Individual Post-Event Evaluation. One-in-seven senior executives (17%) not only want to see the “big picture” in terms of annual and/or quarterly volunteer results, but the results of individual events and activities soon after they happen. In particular, these executives are very interested in having information presented to them about their companies’ annual volunteer events (i.e., Days of Caring, Make a Difference Days, etc.) as soon as the events are concluded. This includes not only raw data on participation, but employee and community feedback as well.

Volunteer-Related Corporate Contributions. Fourteen (14%) of senior executives would like to know what, as well as how much, their companies are contributing to the organizations employees volunteer with (e.g., cash, product or in-kind support), especially in terms of Dollars for Doers, Matching Gift and corporate grants. Although it is unclear why executives want to know this information, the research points to three possible explanations: 1.) executives are simply curious; 2.) this information would better help focus overall corporate giving; and/or 3.) executives have a personal interest in seeing that the organizations they volunteer at receive funding as well.

Volunteer-Inspired/Related Employee Giving. In addition to knowing the amount of “sweat equity” employees contribute to various causes and organizations, 14% of senior executives would also appreciate knowing how much financial equity – money – they are contributing to the groups they volunteer with. In particular, executives want to know if, and how much, employees are contributing in conjunction with, or as a result of, company-sponsored events and activities.

What Peers/Competitor are Doing/Benchmarking. Fourteen (14%) of executives are just as interested in knowing what other companies are doing in terms of volunteerism, as they are interested in knowing how their own companies are doing. Specifically, these executives not only want an annual assessment of their own company, but also would like their CR teams to benchmark what others are doing on an annual basis.

WHAT’S INTERESTING TO KNOW...

Based on the research:

- ✓ According to managers, the size of the company does not affect their abilities to solicit employee feedback
- ✓ The larger the company, the more executives indicate that they would appreciate learning/knowing the types of organizations employees volunteer with, the activities they perform and the level of their involvement (i.e., worker vs. planner vs. board member)
- ✓ Similarly, the larger the company, the more executives indicate that they would appreciate learning/knowing what’s going on in terms of volunteerism in regional offices/business units
- ✓ Two-thirds of executives that want CR/volunteer managers to solicit community feedback and/or undertake community attitude assessments come from companies with fewer than 16,000 people

THE NON-PROFIT PERSPECTIVE ON MEASUREMENT AND EVALUATION . . .

To compare and contrast how companies and non-profits view *Measurement and Evaluation*, non-profit participants were asked to comment on how their organizations conduct measurement and evaluation.

All-in-all:

- ✓ ***Non-profit organizations do a better job at tracking, measuring and evaluating volunteer participation than do companies***

Tracking Employee Participation

Among the non-profits surveyed:

- ✓ 90% track volunteer participation on an ***on-going basis***
- ✓ 7% ***DO NOT*** track employee participation
- ✓ 3% ***DO*** track volunteer participation, but only for ***large, annual events***

Of the non-profit organizations that track employee participation:

- ✓ Three out of four (76%) use a ***standard tool or instrument*** to track/record participation

Typically, non-profits track and record the volunteer's name and contact information, dates and times of service, and a description of services they performed. In some cases, insurance information and brief volunteer feedback are also recorded.

Overwhelmingly, non-profit organizations use the information to evaluate and tweak their programs. Some also incorporate the information volunteers provide in their marketing, fundraising and/or recruitment efforts.

When asked if volunteer information is available to or shared with companies:

- ✓ 45% of non-profits share information on volunteer participation with companies
- ✓ 22% said the information is available, but companies do ask to see it
- ✓ 32% do not share the information with companies
 - 25% of these non-profits said that the companies do not ask to see the information

Measurement and Evaluation

When asked whether or not their organizations measure and/or evaluate the results of various volunteer events and activities, non-profit participants acknowledge the following

- ✓ 74% of non-profit organizations **DO** measure and/or evaluate volunteer events/activities
 - 59% of these non-profits **continuously** measure and/or evaluate volunteer events and activities, particularly after each has been completed
 - 17% measure and/or evaluate volunteer events and activities on a **monthly** basis
 - 14% measure and/or evaluate volunteer events and activities, particularly mentoring programs, on an **annual** basis
 - 14% measure and/or evaluate volunteer events and activities, namely mentoring programs, on a **semi-annual** basis
 - 7% measure and/or evaluate volunteer events and activities on a **quarterly** basis
 - 7% measure and/or evaluate volunteer events and activities on a **as needed** basis
- ✓ 26% of non-profit organizations **DO NOT** measure and/or evaluate volunteer events/activities, either because they do not have the resources or the knowledge to do so

Of the non-profit organizations that do measure and/or evaluate volunteer events and activities:

- ✓ 66% utilize **formal, written surveys/evaluation forms**
- ✓ 38% conduct **informal, face-to-face interviews**
- ✓ 34% conduct **post-event focus groups** and/or debriefings
- ✓ 7% conduct **telephone interviews**

When asked if they share measurement and evaluation results with their corporate partners, particularly information on those events that employees participate in:

- ✓ 41% of non-profit organizations report sharing measurement and evaluation results with corporate partners
- ✓ 59% of non-profits do not share the measurement and evaluation results with corporate partners
 - Half of these non-profits report that companies have never asked them to share results they gained from measuring or evaluating the results of volunteer events/activities

Volunteer Feedback

When asked if they solicit feedback from volunteers:

- ✓ 90% of non-profit's **DO** solicit volunteer feedback; 10% do not
 - 57% of these non-profits solicit volunteer feedback *immediately after each event*
 - 17% solicit volunteer feedback on an *on-going basis*
 - 17% solicit volunteer feedback on a *quarterly basis*
 - 17% solicit volunteer feedback on an *annual basis*
 - 14% solicit volunteer feedback *one week after an event*
 - 14% solicit volunteer feedback on a *semi-annual basis*
 - 9% solicit volunteer feedback *one to two weeks after each event*
 - 9% solicit volunteer feedback on an *ad hoc basis*
 - 6% solicit volunteer feedback on a *monthly basis*

Of the non-profit organizations that do solicit volunteer feedback:

- ✓ 71% utilize *formal written, e-mail* and/or *on-line surveys* to solicit volunteer feedback
- ✓ 66% solicit volunteer feedback *informally, via word-of-mouth*
- ✓ 31% conduct volunteer *focus groups* to solicit volunteer feedback
- ✓ 26% solicit volunteer feedback via *formal, face-to-face interviews*
- ✓ 20% conduct *formal, telephone interviews* to solicit volunteer feedback

When asked if they share volunteers' opinions and comments with corporate partners, particularly what their own employees have to say:

- ✓ Nearly two thirds (64%) of non-profit organizations **DO NOT** share volunteer feedback with corporate partners
 - More than half of these groups (57%) report that their corporate partners have never asked for/showed an interest in knowing what their employee volunteers think
- ✓ 36% of non-profit organizations **DO** share volunteer feedback with corporate partners
 - Nearly half of these non-profits (47%) share only limited amounts of volunteer feedback

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW...

- ✓ *Both CR/volunteer managers and senior executives agree that Measurement and Evaluation is key to the success of their volunteer programs.*
- ✓ *In fact, 88% of CR/volunteer managers and 66% of senior executives consider Employee Participation as the primary measure of success.*
- ✓ *Managers from companies that do not track employee participation, yet base the success of their programs on employee participation, cannot possibly know whether or not their programs are successful, nor to what degree.*
- ✓ *When tracking employee participation, CR/volunteer managers should focus on:*
 - *Total number of unique employee volunteers*
 - *Total number of hours served by all employees*
 - *Types of activities/services performed by employees*
 - *Number of hours served by individual employees*
 - *Types of skills used/practiced by employees*
- ✓ *The more frequently CR/volunteer managers utilize formal instruments or tools to track employee participation, the more successful they feel their programs are.*
- ✓ *Additionally, the more frequently CR/volunteer managers share information on employee participation with senior management, and the more data/information they share, the more successful CR/volunteer managers feel their programs are.*
- ✓ *Ideally, CR/volunteer managers should try and share all the data/information they track/collect on employee participation with senior management on a quarterly and yearly basis.*
- ✓ *To generate greater buy-in and support from senior management, CR/volunteer managers should also consider tracking and reporting:*
 - *Types of organizations employees volunteer with*
 - *Employee participation broken-out by regional/business unit*
 - *Volunteer-related corporate contributions*
 - *Volunteer-inspired/related employee giving*

- ✓ *CR/volunteer managers from companies that measure and/or evaluate volunteer events/activities rate their programs more successful than the programs of their peers whose companies do not measure and/or evaluate volunteer events/activities.*
- ✓ *The more frequently CR/volunteer managers utilize a formal instrument or tool to measure and evaluate volunteer events and activities, the more successful they feel their programs are.*
- ✓ *Current budget and staffing levels (resources) have little to no bearing on whether or not companies are measuring and/or evaluating the success or impact of their programs. The majority of CR/volunteer managers do not measure and/or evaluate volunteer events/activities either because they lack the knowledge and/or experience to do so. As a result, these managers should consider undergoing training or utilizing external resources, such as LBG Associates, to measure and evaluate their programs.*
- ✓ *When measuring/evaluating volunteer events/activities, CR/volunteer managers should consider conducting post-event wrap-ups or evaluations for all events and activities and sharing this information with senior management.*
- ✓ *Managers from companies that solicit employee and community feedback consider their programs more successful than the programs of their peers whose companies do not solicit employee and/or community feedback.*
- ✓ *Sharing employee feedback with senior management not only impacts the success of volunteer programs in the eyes of most CR/volunteer managers, but 41% of senior executives want managers to provide this information and 10% base the success of their programs, in part, on employee feedback.*
- ✓ *Sharing community feedback with senior management may not impact success in the eyes of many CR/volunteer managers, but 21% of senior executives want managers to provide this information and 10% base the success of their volunteer programs on it.*
- ✓ *In addition to soliciting employee and community feedback, 14% of senior executives also want to know what other companies are doing in terms of volunteerism, and would like CR/volunteer managers to regularly benchmark their companies' volunteer programs against those of their peers and competitors.*

EMPLOYEE PARTICIPATION

Managers (82%), senior executives (66%) and non-profit organizations (58%) all agree that employee participation is one of the best measures to determine the success of a volunteer program. In 2001, *Communications and Marketing*, *Education and Training* and *On-Going Programs and Activities* were identified by CR/volunteer managers as three “key components” to successfully generating and sustaining a high level of employee participation. Three years later, managers, as well as their non-profit partners, feel similarly, citing *Active*, *On-Going Communications* and *Employee-Friendly Programs and Practices* as “key components” to successful volunteer programs. Views on *Training*, however, have changed considerably.

What this study found is that:

- ✓ 94% of executives believe employees should be actively encouraged/recruited to participate in company-sponsored volunteer events and activities
- ✓ 73% of executives believe that employees should be actively encouraged to participate in non-company sponsored volunteer events and activities

However, many executives feel that companies need to be careful about the fine line between “encouraging” employees to volunteer and “coercing” employees to volunteer.

“I think it is really important to build your Foundation around your company’s culture and values – that is what we have done at Schwab. We have a culture of individualism, choice and empowerment. In our business, we have always been about giving our clients the tools and knowledge to make their own informed choices, and we do the same with our employees with regards to our corporate philanthropy. We do not mandate, for example, which organizations or causes our employees should support or how to give back whether it’s through time or money. If we mandate an organization or cause, we risk discouraging our employees.”

We feel it’s the Foundation’s responsibility to act as an agent for philanthropy by serving as a clearinghouse, to inspire and motivate employees by providing strategic ways they can give back. We give our employees the opportunities to volunteer by providing various vehicles to become engaged: we help match employees to boards, we organize a national volunteer day and we partner with the Boys and Girls Clubs. Each of these give our employees avenues for service. Also, we find that our employees love to give back in a group format. It feeds the soul and makes for happier and more energized employees. It’s a ‘win-win’ for all.”

Carrie Schwab-Pomerantz
President
The Charles Schwab Foundation

During the course of the research, both CR/volunteer managers and senior executives were asked whether or not current employee participation/volunteer rates are appropriate or not, and what, if anything, they would like done differently.

Overall, CR/volunteer managers are split in their views on the appropriateness of current employee participation rates:

- ✓ 51% believe current employee participation is **APPROPRIATE** (S=6.13)
 - These managers rate their programs 12% more successful than the programs of their peers who feel current employee participation levels are inappropriate
- ✓ 45% believe current employee participation is **INAPPROPRIATE** (S=5.48)
- ✓ 4% simply **DON'T KNOW** if current employee participation rates are appropriate or not

Senior executives, on the other hand, overwhelmingly feel current employee participation/volunteer rates are appropriate:

- ✓ 97% of executives acknowledged that they are familiar with the level of volunteerism
- ✓ 75% feel the current level of participation/volunteerism is **APPROPRIATE** (S=6.14)
 - These executives feel their programs are 19% more successful than the programs of their peers who feel current employee volunteerism rates are inappropriate
- ✓ 21% feel the current level of participation/volunteerism is **INAPPROPRIATE** (S=5.14)

All-in-all:

- ✓ ***The more the appropriate senior executives and CR/volunteer managers feel the level of employee volunteerism is, the more successful they feel their programs are***

HOWEVER . . . while the majority of managers and executives may feel the current level of employee participation/volunteerism is appropriate:

- ✓ ***49% of companies really have no idea how many of their employees volunteer, nor how frequently they volunteer, yet:***
 - 74% of these companies base the success of their programs on employee participation

EMPLOYEE PARTICIPATION RATES AND TARGETS

<u>Definition for Participation</u>	<u>% of Cos.</u>	<u>Current Rate</u>	<u>Target Rate</u>	<u>Increase</u>
Don't Know	28%	N/A	60%	6000%
Don't Know/Best Guess	21%	22%	44%	100%
Company-Sponsored Events	23%	19%	25%	32%
Company and Non-Company Events	15%	31%	36%	20%
Paid Time-Off	3%	30%	40%	33%
Dollars For Doers Programs	3%	20%	30%	50%

Based on the chart above:

- ✓ 28% of managers ***DON'T KNOW*** and won't even venture a guess as to the level of employee participation (S=5.62)
 - Overall, managers from these companies feel their programs are "Somewhat Successful" to "Successful"
 - 77% of these managers base the success of their programs on the level of employee participation, but do not know what that level is
 - 46% of these managers somehow feel the current level of employee participation is appropriate, but do not know what that level is
 - On average, these managers would like to see 60% of employees volunteering in their communities, either through company- or non-company sponsored events
- ✓ 21% of managers ***DON'T KNOW***, but estimate/guess that 22% of employees participate in ***company-sponsored events/activities*** (S=5.80)
 - Overall, managers from these companies consider their programs to be "Successful"
 - 70% of these managers base the success of their programs on the level of employee participation, but really don't know what that level is
 - 40% of these managers feel the current level of employee participation is appropriate
 - On average, these managers would like to double the level of employee participation
- ✓ 23% of companies, on average, believe that 19% of employees participate in ***company-sponsored events*** (s=6.09)
 - Overall, managers from these companies consider their programs to be "Successful"
 - On average, these managers would like to increase employee participation by 32% from 19% participation to 25%
- ✓ 15% of companies, on average, estimate that 31% of employees participate in both ***company- and non-company sponsored events/activities*** (s=5.71)
 - Overall, managers from these companies feel their programs are "Somewhat Successful" to "Successful"
 - On average, these managers would like to increase employee participation by 20%

Managers were asked to identify the tools and techniques they use to recruit employees to volunteer, and to highlight which of those are the most effective. The following represent the most commonly used tools and techniques to recruit volunteers:

**MOST COMMONLY USED VOLUNTEER
RECRUITMENT TECHNIQUES – MANAGERS**

1. Word of Mouth – Employees (100%)
2. E-mails (94%)
3. Posters/Flyers (89%)
4. Corporate Intranets/Volunteer Web Sites (87%)
5. Word of Mouth – Senior Management (83%)
6. Kick-Offs and Rallies (57%)
7. Newsletters (47%)
8. Voicemail (32%)

(%) denotes the percentage of participants that provided this response

CR/volunteer managers also identified kiosks, employee orientations, local corporate volunteer intranets, employee/company magazines, direct mailings and staff meeting presentations as ways that they recruit employees to volunteer.

“One of the ways we recruit large numbers of volunteers is through direct mail pieces. We’ve found that with other promotional efforts (not related to volunteer programs), direct mail seems to be the most effective way to reach employees.”

Saundra Knight
Program Manager, Community Relations
Sempra Energy

Regardless of what tools and techniques CR/volunteer managers use most to recruit volunteers, the following are what they feel works best:

**MOST EFFECTIVE VOLUNTEER
RECRUITMENT TECHNIQUES – MANAGERS**

1. E-mails
2. Kick-Offs and Rallies
3. Word of Mouth – Employees
4. Word of Mouth – Senior Management
5. Voicemail
6. Corporate Intranets/Volunteer Web Sites
7. Posters/Flyers
8. Employee Newsletters

“We have a monthly Community Relations Activities calendar which has been extremely effective in terms of advertising our initiatives and volunteer opportunities – employees have learned that’s the primary way they can learn about what we are doing. We also have found that asking our senior leadership to endorse and promote volunteerism has been effective as well. Many times, we simply pick up the phone and call people and ask for their help, or ask them if they know someone who can help coordinate or support a project. They are usually very responsive, and we’ve found this to be an extremely effective way of getting new people engaged.”

Julie Hershey
Manager, Community Relations
Sprint Corporation

During the course of the interviews, CR/volunteer managers were asked if employees in local/field offices and at corporate headquarters are recruited using similar tools and techniques.

Based on their responses:

- ✓ 77% of managers report that the same tools/techniques are used to recruit volunteers corporate-wide
- ✓ 11% of managers report that employees in local/field offices, especially manufacturing facilities, are recruited using “less sophisticated” tools and techniques than employees at corporate headquarters
- ✓ 9% of companies do not have volunteer programs in local/field offices
- ✓ 4% of managers “don’t know” how volunteers are recruited in local/field offices

E-mail is easy, cost efficient, and readily available to many employees. It is also an effective vehicle to foster two-way communication, register participants and solicit feedback after individual volunteer events and activities are completed. Companies, however, need to be mindful of corporate non-solicitation policies and should only e-mail employees who want to receive information on volunteer events and activities. The drawback is that not every employee has access to e-mail, especially those that work outdoors and in factories.

Kick-Offs and Rallies. Although CR/volunteer managers consider *Kick-Offs and Rallies*, events similar to what many companies utilize to launch workplace giving and United Way campaigns, as one of the most effective means to recruit volunteers, slightly more than half of all companies (57%) use them. Often these involve a large assembly, lots of pomp-n-circumstance, plenty of on-going, internal communications and a number of employees acting like cheerleaders to motivate/recruit their fellow co-workers.

Word of Mouth – Employees. Utilizing employees to get the word out about upcoming events/activities, as well as other volunteer-related programs and initiatives, is not only the most commonly used recruitment tool/technique, but also one of the most effective. As the Independent Sector highlighted in its 1999 national survey on giving and volunteering in the United States, 90% of all Americans volunteered when personally asked to do so.

Word of Mouth – Senior Management. CR/volunteer managers find that utilizing senior management to get the word out and motivate volunteers is also a fairly effective technique.

“Support from senior management and from other employees is what our focus groups show most effectively recruits volunteers. It shows the importance, level of support and examples of how to engage successfully.”

Diane Melley
On Demand Community Project Director
IBM Corporation

Voicemail. Leaving phone messages for employees to inform them of upcoming volunteer events and activities, reminding them of the events/activities they signed-up for and notifying them of application deadlines, is an effective recruitment tool/technique which is utilized by nearly one-third of CR/volunteer managers.

Corporate Intranets. Intranets are a great passive medium for providing volunteer information to employees, such as volunteer event calendars and up-coming opportunities, how to organize volunteer events, Dollars For Doers programs, stories on employee volunteers, release time policies, on-line registration forms and on-line evaluation forms.

“We post stories internally and externally on the Cisco website about teams doing volunteer service. We find that this type of promotion is most effective in terms of motivating other teams to do service.”

Rebecca Wang
Program Manager, Corporate Philanthropy
Cisco Systems

Posters/Flyers. Hanging posters and flyers throughout the workplace is still used by nearly 90% of all CR/volunteer managers to inform employees of upcoming events/activities and recruit them to participate. Although e-mails and intranets tend to be more effective at recruiting volunteers, CR/volunteer managers rely on posters and flyers to communicate with employees in local and/or manufacturing facilities where employees often do not have access to these technologies.

Newsletters. Whether on-line or in print format, weekly, bi-weekly and/or monthly employee newsletters are utilized by slightly less than half of all CR/volunteer managers (47%), but the effectiveness of newsletters to inform and recruit volunteers is somewhat mixed.

“Effectively recruiting volunteers is a constant process. Articles in the Company’s daily e-newsletter (on-line), stories in our monthly magazine, stories in our quarterly video review – all these items are watched or read by all employees every morning. At the hiring stage, employees watch a community video and are introduced to the various company volunteer programs by their managers.”

Christopher P. Lambe
Administrator
Xcel Energy Foundation

CR/volunteer managers were also asked to identify the tools and techniques that work best to recruit newly hired employees, as well as veteran employees who have never volunteered before. Overall, managers identified 15 unique tools and/or techniques that they feel work best at recruiting new and existing employees:

RECRUITING NEWLY HIRED EMPLOYEES AND SEASONED VETERANS

1. Word-of-Mouth – Employees (47%)
2. Word-of-Mouth – Senior and Middle Management (23%)
3. New Employee Orientations (21%)
4. Electronically: E-mails and Volunteer Intranet Sites (19%)

(%) denotes the percentage of participants that provided this response

“As with all retailers, Federated experiences a high turnover rate at the entry store level, which means that personal communication is the best way to reach our new associates – and it’s also the most effective in encouraging volunteerism! This is accomplished through store-wide meetings led by store managers, often including an update by the local ‘Partners In Time’ volunteer captain and often supported by a representative of the non-profit beneficiary of the project. Also important is visual support through signs, nametag pins and posters. Divisions are in various stages of posting volunteer projects on intranet sites so associates can read about them from a central computer in the employee break room.”

Jean Reisinger Coggan
Manager, Community Relations
Federated Department Stores

Managers also feel that the following are highly effective tools and techniques for recruiting new and seasoned employees:

- Newsletters
- Posters and Flyers
- Corporate sponsorships of volunteer events
- Kick-offs and Rallies
- Direct mailings/Paycheck inserts
- Teambuilding activities
- Posting stories of current volunteers

In today's business world, employees are working harder and longer at their jobs than ever before. As such, employees' personal time – time spent with family and friends away from the workplace – is a scarce commodity. To accommodate employees' work/life needs, but still entice them to participate in company-sponsored events, particularly those done on the weekends, companies have had to spend time designing and implementing volunteer events and activities that do not take employees away from their friends and family, but rather allow their loved ones to volunteer along side them.

During the course of the interviews, CR/volunteer managers were asked to identify the most popular events, activities and/or organizations that employees volunteer with, or request to volunteer with. Nearly 80% of managers report that the following as the most popular events, activities and organizations:

MOST POPULAR VOLUNTEER EVENTS, ACTIVITIES AND ORGANIZATIONS

1. "Done-In-A-Day" Events
2. "Walk-A-Thons"
3. Habitat for Humanity Builds
4. Clean-Up's/Painting Projects
5. Education/School-Related Projects
6. Mentoring/Tutoring
7. United Way/Workplace Giving Campaigns
8. Youth-Related Projects
9. Human Services Organizations
10. Events Including Friends and Family Members
11. Team/Group Projects and Events
12. Food Banks
13. Religious-Affiliated Groups
14. Holiday Events

Interestingly:

- ✓ 19% of managers did not identify any activities which enjoy higher participation rates

THE NON-PROFIT PERSPECTIVE ON EMPLOYEE PARTICIPATION...

During the course of the research, non-profit participants were asked, “*How often does your organization require volunteer support?*”

✓ ***Overwhelmingly, non-profit organizations need volunteer support during the workday/workweek as opposed to on the weekends or after normal business hours***

- 85% of community groups utilize volunteers on a ***daily basis***
- 15% of community groups utilize volunteers ***once during the week***
- 15% of community groups utilize volunteers for ***monthly projects***
- 10% of community groups utilize volunteers ***two to three times during the week***
- 8% of community groups utilize volunteers on ***weekends***
- 5% of community groups utilize volunteers on a ***bi-weekly basis***
- 5% of community groups utilize volunteers for ***annual, seasonal or holiday projects***

Non-profit participants were also asked what types of projects and activities they need/recruit volunteers for. On average, non-profit organizations report that they typically use volunteers to fill four major needs at their organizations. Overall, however, participants identified the following as the most popular roles which volunteers fill within their organizations:

WHAT NON-PROFITS USES FOR VOLUNTEERS

1. Service Delivery (79%)
2. Board Service (59%)
3. Fundraising (56%)
4. Administrative Support (54%)
5. Event Planning and Management (44%)
- Mentoring/Tutoring (44%)
7. Professional & Technical Support (26%)
8. Clean-up, Repair and Maintenance (18%)
9. Advocacy/Outreach (13%)
10. Adult Education/Workforce Develop (10%)

(%) denotes the percentage of non-profits that provided this response

Service Delivery. Overall, nearly eight out of ten non-profit organizations (79%) rely on volunteers to help fulfill their missions and provide direct services to their clients. Clients and services will vary from organization to organization and can include anyone and anything from reading to children, serving meals to the homeless, constructing a Habitat House, etc.

Board Service. While every non-profit organization maintains a Board of Directors which is typically run by volunteers, only 59% of participants report needing volunteers to serve on their Boards. Realistically, every non-profit needs volunteers to provide leadership and guidance by serving on their Boards of Directors.

Fundraising. More than half of all non-profits (56%) report one of the most important tasks they utilize volunteers for is to generate revenue through fundraising efforts. This should be no surprise given the fact that non-profits, on average, tend to value the dollars/donations generated through volunteerism more than the act of volunteering, itself.

Administrative Support. Slightly more than half of all non-profits (54%) need/use volunteers to help with simple, day-to-day tasks such as answering phones, stuffing envelopes, making photocopies, scheduling appointments, etc.

Event Planning and Management. Given the limited number of personnel that non-profits typically employ, nearly half the non-profits involved in this study (44%) report needing/utilizing volunteers to actually plan, organize and manage volunteer events and activities, including fundraising events/activities.

Professional and Technical Support. Due to limited human and financial resources, roughly one in four non-profits (26%) report utilizing volunteers to address needs associated with such things as computer/IT support, accounting, bookkeeping, taxes, communications, marketing, etc. If corporate volunteers were not available to routinely provide these services free of charge, non-profits would have to pay for them.

Clean-up, Repair and Maintenance. Although CR/volunteer managers feel that this is one of the most popular forms of volunteering, only 18% of non-profits report actually needing volunteers to clean-up parks, paint and repair schools/buildings, and perform other general maintenance tasks.

Adult Education/Workforce Develop. One out of ten non-profits (10%) utilize volunteers to enhance adults skills often related to gaining employment, such as learning how to read (adult literacy), teaching English as a Second Language and computer training.

To help facilitate the volunteer process:

- ✓ *64% of non-profit groups maintain a volunteer coordinator – someone specifically tasked with recruiting and managing volunteers*
- ✓ *82% of non-profit groups offer volunteer projects/activities specifically for companies*

Non-profits were asked to identify the tools and techniques they use to recruit corporate volunteers and the following represent those most commonly used:

**TOP TECHNIQUES USED BY NON-PROFITS TO
RECRUIT CORPORATE VOLUNTEERS**

1. Work Directly with Corporate CR Staff to Plan Events
2. Plan and Organize Team/Group Projects and Activities
3. Attend Workplace Volunteer Fairs/Speak to Volunteers On-site
4. Leverage Corporate Sponsorships with Volunteer Events/Activities
5. Offer Done-in-a-Day Volunteer Events/Activities
6. Maintain Constant Communications with CR/Volunteer Managers
7. Offer Custom-Tailored Volunteer Projects for Companies
8. Provide Volunteer Training to Employees at/in the Workplace
9. Partner with Groups Companies Use to Find Volunteer Opportunities

“We attend volunteer fairs, work directly with corporate representatives, provide information directly to employees via orientation sessions, and provide materials on volunteering to companies for use in their corporate newsletters.”

Cathy Guinta
Executive Director
Stamford Public Education Foundation

Non-profit participants also identified the following as effective ways to recruit corporate volunteers:

- Posting a link to their organizations on corporate inter/intranet sites
- Plan volunteer events/activities around United Way/workplace giving campaigns
- E-mailing employees
- Distributing literature in the workplace on their organizations and how to volunteer
- Appealing directly to senior management

“We create an individual plan for each company that we work with based on both our needs and theirs. Often times this happens through the assistance of Board Members and/or Special Events.”

Amy Drury
Vice President, Development
Junior Achievement Orlando

Respondents from non-profit organizations were also asked to list the top five actions they feel CR/volunteer could take or implement to better recruit/motivate employees to volunteer. Overall, respondents identified 30 unique techniques which they feel CR/volunteer could use to effectively encourage employees to volunteer. The following represent the most popular recommendations non-profits have for CR/volunteer managers to better recruit and retain employee volunteers:

TOP 20 VOLUNTEER RECRUITMENT AND RETENTION TECHNIQUES FOR CR/VOLUNTEER MANAGERS

1. Recognize/Thank Volunteers (74%)
2. Actively Promote Volunteerism & Volunteer Opportunities in the Workplace (72%)
3. Allow Employees to Volunteer During the Workday/On Company Time (62%)
4. Get Senior Management Involved in Volunteering (51%)
5. Provide Incentives via Dollars for Doers / Matching Gifts Programs (36%)
Encourage/Organize Team/Group Projects (36%)
7. Provide Employee with Paid Time-Off to Volunteer (33%)
Maintain a Dedicated Staff to Manage Volunteerism (33%)
Maintain a Dedicated Volunteer Budget (33%)
Provide In-Kind Support and Resources (33%)
Establish Volunteerism as a Corporate Value (33%)
12. Solicit and Incorporate Employee Feedback/Interests (28%)
13. Develop and Maintain a Strategically-Focused Volunteer Program (23%)
14. Offer a Wide Variety of Volunteer Opportunities (18%)
Create Avenues that Provide for/Encourage Greater Employee Ownership (18%)
Educate Employees on the Personal & Community Benefits of Volunteerism (18%)
17. Provide Financial Support/Grants to Organizations Where Employees Volunteer (15%)
18. Develop Realistic Goals & Expectations for Both Employees & the Program (13%)
19. Provide Training to Employees for Specialized Forms of Volunteerism (13%)
20. Make it Easy for Employees to Get Involved (10%)

(%) denotes the percentage of non-profits that provided this response

“To successfully recruit and support volunteers, companies need to: constantly provide them with information on volunteer events and opportunities; maintain a point-person (dedicated staff) within the company to manage volunteerism; allow employees to volunteer on company time, either on an individual or group basis; establish a Dollars For Doers program to financially support the volunteer efforts of employees; and thank/recognize employees for their service.”

Celia Silberberg
former Volunteer Services Coordinator
Capital Area Food Bank

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW...

- ✓ *The overwhelming majority of respondents, both managers and executives alike, base the success of their volunteer programs on the level of employee participation.*
- ✓ *As noted earlier, senior executives, on average, consider their companies' volunteer programs more successful than do managers. This can be attributed, in part, to the fact that senior executives feel that the current levels of employee participation are more appropriate than do managers.*
- ✓ *In fact, the more appropriate both managers and executives feel the levels of employee participation are, the more successful they feel their programs are.*
- ✓ *Although managers may feel they are doing a good job tracking employee participation, 50% of managers have no idea how many, or how often, employees volunteer. As such, roughly 40% of managers, in all likelihood, have no idea how successful their volunteer programs truly are.*
- ✓ *Based on the research, it appears as though senior management believes employee participation rates are higher than they really are and that volunteer programs are more successful than they really are. Given the importance senior executives place on measurement and evaluation, companies need to do a much better job at accurately tracking employee participation and sharing the information with senior management.*
- ✓ *Managers should focus on tracking employee participation in company-sponsored events, especially the names of the individual employees that participate. Without tracking each employee individually, companies will never know the accurate level of employee participation.*
- ✓ *To successfully recruit employees to participate/volunteer, managers should utilize a combination of electronic, print and verbal communications tools and tactics.*
- ✓ *Although personally asking employees to volunteer has always proven to be an effective means to recruit/motivate employees, given that we live in a digital age, managers, overwhelmingly, consider e-mail as the most effective recruitment tool.*

SENIOR MANAGEMENT PARTICIPATION

Like any other business function, a corporate volunteer program's ultimate success is determined, in large part, by the extent to which senior management endorses the program. Therefore, generating buy-in from senior management is not only key, but also imperative!

As highlighted earlier in Chapter 2:

- ✓ 74% of CR/volunteer managers consider *Senior Management Buy-In and Support* as a “key component” to the success of their volunteer programs

Based on the research, if CR/volunteer managers can successfully demonstrate the value and benefits of volunteerism, and win over the hearts and minds of their senior managers, buy-in can generate three immediate benefits for the corporate volunteer program:

Legitimacy / Validation. Successfully generating support/buy-in from senior management both legitimizes and validates the existence of a corporate volunteerism program. It says to employees, shareholders, customers and the community at-large that, “*we, the company (a.k.a. senior management), see the importance of, and the benefit from, the involvement of our employees in the communities in which we do business, and will actively support our employees’ current initiatives, and will work to encourage others to do so.*” Although the degree to which senior management may support corporate volunteerism varies from one company to the next, the mere fact that senior management is on-board elevates the importance of such programs.

Dedicated Resources. One of the “key components” to creating a formal corporate volunteer program is securing dedicated resources to successfully run the program. Although this may often prove to be an arduous task, generating buy-in from senior management, more times than not, will bring with it necessary, and often additional, resources.

Motivation / Leadership. Part of senior management’s duties and responsibilities, aside from running a profitable corporation, is to set the tone and direction of the company- in short, to demonstrate leadership. To succeed as a leader, senior managers need to persuade employees to believe in their ideas and to follow them. Generating buy-in from senior executives will hopefully encourage senior managers’ participation and help motivate and encourage employees at all levels to volunteer.

In the 2001 study, *50% of CR/volunteer managers indicated that the most successful approach or technique for generating senior management support is to get them involved in a volunteer project or activity.* By experiencing first-hand what it is like to volunteer, many executives are immediately hooked on volunteering. Unfortunately, getting senior management to volunteer side-by-side with employees in company-sponsored events and activities is a challenge, especially due to the time constraints placed on senior management.

“Senior management involvement is key to the success of our volunteer program. However, we understand that due to business demands and hectic schedules, they can’t do everything. Therefore, we have to be selective – we have to be strategic – with what we ask them to get involved with, whether it is participating in an event or serving on a board. We need to intelligently match managers’ interests and talents with the needs of the community and our non-profit partners.”

Carla Robertson
Director, Volunteer & Education Services
Alabama Power

Three years later, in 2004, many CR/volunteer managers still feel that senior management is vital to the overall success of corporate volunteer programs. In fact, as Chapter 2 demonstrated:

- ✓ 21% of managers consider **Senior Management Participation** as a “key component” to the success of their volunteer programs – executives must support volunteerism both in action, as well as in word

What the research also found is that:

- ✓ 100% of executives believe that their peers – senior management – should actively volunteer in the community, particularly in company-sponsored events and activities
 - Many also believe that all levels of management should volunteer in their communities

“I believe the level of senior management’s participation is appropriate, but we need to do a better job recruiting managers and directors to get involved. They are too busy trying to become VP’s themselves that they don’t necessarily have the time to volunteer or serve on boards.”

John Pacheco, Jr.
Executive Director
Xcel Energy Foundation

Furthermore, as this chapter will soon reveal:

- ✓ ***The more involved executives are, the more successful they feel their companies’ volunteer programs are***

Based on the research:

- ✓ 100% of CR/volunteer managers report that *a certain portion* of senior management volunteers
 - 5% of managers define “senior management” as the Top Tier of management – the “Chiefs” (i.e. CEO, COO, CFO, etc.)
 - 21% of managers define “senior management” as the Top 2 Tiers of management – Chiefs and Senior Vice Presidents
 - 46% of managers define “senior management” as the Top 3 Tiers of management – Chiefs, Senior Vice Presidents and Vice Presidents
 - 28% of managers define “senior management” as the Top 4 Tiers of management – Chiefs, Senior Vice Presidents, Vice Presidents and Directors

Surprising, executives feel senior management’s level of participation is more significant to the success of volunteer programs than do CR/volunteer managers. On average, executives feel *Senior Management Participation* is “Significant” to the overall success of volunteer programs (I=5.76), whereas CR/volunteer managers feel *Senior Management Participation* is only “Somewhat Significant” to the overall success of corporate volunteer programs (I=5.27).

SENIOR MANAGEMENT PARTICIPATION’S IMPACT ON SUCCESS

CR/Volunteer Managers

18% “Very Significant”
 29% “Significant”
 29% “Somewhat Significant”
 11% “Neutral Impact”
 13% “Somewhat Insignificant”
 0% “Insignificant”
 0% “Completely Insignificant”

Senior Executives

48% “Very Significant”
 17% “Significant”
 17% “Somewhat Significant”
 7% “Neutral Impact”
 3% “Somewhat Insignificant”
 3% “Insignificant”
 3% “Completely Insignificant”

“Senior management’s involvement/participation is very significant to the overall success of the company’s volunteer program. Senior management must set the tone and lead by example in all areas where results are important to the company (e.g. employee safety, total shareholder return, budget management, customer satisfaction, sales, etc.). Volunteerism in the community is no exception. If it is important to the company, senior managers must be actively engaged in volunteer roles themselves.”

Terry Waters
 Vice President
 Alabama Power Western Division

One possible explanation why managers and executives do not necessarily agree on the impact **Senior Management Participation** has on the overall success of volunteer programs is the overwhelming importance managers place on the level of senior management buy-in and support versus actual participation. Another possible explanation is that executives feel senior management is more involved in volunteerism than managers do.

“While it is important for employees to know that executives ‘walk the talk,’ it is more critical that the volunteer program have the support of the executives. Without our senior management support, finances, people, time and other resources would not be made available to carry out a successful volunteer program. The fact that executives participate is helpful by adding credibility to the program among employees.”

Brad Fisher
Director
Wal-Mart Foundation

During the course of the research, both senior executives and CR/volunteer managers were asked to rate senior management’s current level of involvement on a scale from 1 to 5, with each score represented by the following explanations below:

Very Involved (5.00): A majority of senior managers serve on non-profit boards, participate in at least one Company-sponsored event per year and actively encourage other employees to volunteer.

Involved (4.00): Many senior managers participate on non-profit boards, some participate in Company-sponsored events and most actively encourage other employees to volunteer.

So-So (3.00): Some senior managers volunteer, while others do not. Demonstrating the value/benefits of volunteerism is somewhat of a challenge, but many managers still support employee involvement.

Somewhat Uninvolved (2.00): While some senior managers may serve on select non-profit boards or volunteer on their own time, most do not participate in Company-sponsored events nor do they encourage other employees to do so.

Not Involved (1.00): An overwhelming majority of senior managers do not volunteer, do not see the benefit(s) of volunteerism and do not encourage employees to volunteer; some may even dissuade employees from volunteering, especially during working hours.

Overall, executives feel senior management is more actively involved in volunteerism than do CR/volunteer managers. On average, executives rate senior management's current level of participation/volunteerism as "Involved" (4.03 on a 5-point scale) whereas CR/volunteer managers, on average, consider senior management's current level of participation/volunteerism somewhere between "So-So" and "Involved" (3.70 on a 5-point scale).

SENIOR MANAGEMENT PARTICIPATION

CR/Volunteer Managers

19% "Very Involved"
43% "Involved"
30% "So-So"
6% "Somewhat Uninvolved"
2% "Not Involved"

Senior Executives

45% "Very Involved"
24% "Involved"
24% "So-So"
3% "Somewhat Uninvolved"
3% "Not Involved"

✓ ***The more involved executives feel senior management is, the more successful they feel their overall programs are:***

- Executives who feel their senior management is "Very Involved" rate their programs "Successful" to "Highly Successful" (S=6.31)
- Executives who feel their senior management is "Involved" rate their programs as "Successful" (S=5.86)
- Executives who feel their senior management's involvement is "So-So" rate their programs "Somewhat Successful" (S=5.29)
- Executives who feel their senior management is "Somewhat Uninvolved" also rate their programs as "Somewhat Successful" (S=5.00)

Another way to look at it is:

- Executives who feel their senior management is "Very Involved" rate their programs:
 - 8% more successful than their peers whose senior management is "Involved"
 - 18% more successful than their peers whose senior management's involvement is "So-So"
 - 26% more successful than their peers whose senior management is "Somewhat Uninvolved"

✓ ***According to CR/volunteer managers, senior management must be "Very Involved" in order to significantly impact the success of corporate volunteer programs***

- Managers who feel senior management is "Very Involved" consider their programs "Successful" to "Very Successful" (S=6.22)
- Managers who feel senior management is "Involved" (S=5.60), "Somewhat Involved" (S=5.71) or "So-So" (S=5.67) all consider their programs between "Somewhat Successful" and "Successful"

During the course of the research, however, CR/volunteer managers and senior executives were asked whether or not current levels of senior management participation are appropriate, and what, if anything, they would like to see done differently.

Based on managers' responses:

- ✓ 53% of managers feel senior management's level of participation is **APPROPRIATE**
 - On average, these managers rate their programs "Successful" (S=5.84)
 - 11% more successful than their peers who feel senior management's current level of participation is inappropriate
 - On average, these managers rate senior management's participation between "Involved" and "Very Involved" (4.32 on a 5-point scale)
 - Senior managers from these companies are 34% more active than their peers

Overall, these managers feel senior management's current level of participation is "Significant" to the success of their volunteer programs (I=6.00)

"The level of senior management endorsement and support of the Fluor Volunteer Program is strong. Senior management's actual participation in projects around the globe varies from very active to less active. In some cases we would like to see more visible participation as we know this sends a strong message to employees about the support of the program."

Suzanne H. Esber
Executive Director
Fluor Foundation

On the other hand:

- ✓ 47% of managers feel senior management's level of participation is **INAPPROPRIATE**
 - On average, these managers rate their programs between "Somewhat Successful" and "Successful" (S=5.73)
 - On average, these managers rate senior management's participation as "So-So" (3.23 on a 5-point scale)
 - Overall, these managers feel senior management's current level of participation is having a "Neutral" impact on the success of their volunteer programs (I=4.41)

Regardless of whether current senior management involvement is appropriate or not, CR/volunteer managers commonly agree on the following:

- ✓ Senior management, in general, needs to participate in more events and take a greater leadership role in planning and promoting community service activities
- ✓ Senior management, in general, needs to “get their hands dirty,” as well as take a more active role recruiting other executives
- ✓ Every senior manager needs to participate in at least one, *employee-visible* event per year
- ✓ Every senior executive needs to serve on the Board of Directors of at least one non-profit organization in the community

“I think a lot could be gained from senior managers participating in volunteer events alongside employees. First, it lends more support to the event and likely would encourage others to participate. Second, it shows that the Moody’s culture as a whole values volunteerism and support for the communities where we live and work. However, I never want employees to feel as though they have to volunteer because their managing director is volunteering, and I don’t want senior management showing up at events that they really don’t want to participate in, because it would be transparent and do more damage to employee morale than good.”

Jennifer Dwyer
Volunteer Coordinator
Moody’s Corporation

In contrast, **executives feel senior management’s current level of participation is more appropriate than CR/volunteer managers.**

Based on executives’ responses:

- ✓ 76% of executives feel senior management’s current involvement is **APPROPRIATE**
 - On average, these executives rate their programs as “Successful” (S=6.05)
 - 14% more successful than their peers who feel senior management’s current participation is inappropriate
 - Overall, these executives rate senior management’s current level of participation as “Very Involved” (4.50 on a 5-point scale)
 - Senior managers from these companies are 75% more active than their peers

- ✓ 24% of executives feel senior management's current involvement is *INAPPROPRIATE*
 - On average, these executives rate their programs as "Somewhat Successful" (S=5.29)
 - Overall, these executives rate senior management's current participation as "So-So" (2.57 on a 5-point scale)

The research indicates that *executives may feel senior management's level of involvement/participation is more appropriate than CR/volunteer managers due to executives' own personal level of involvement/volunteerism.*

During the interviews, in addition to evaluating their peers' levels of participation, senior executives were also asked to evaluate their own personal levels of volunteerism/participation.

- ✓ On average, the senior executives that participated in this study feel that they are more involved in their communities than their fellow executives, and consider their personal levels of volunteerism between "Involved" and "Very Involved" (4.34 on a 5-point scale)
 - 45% of senior executives feel they, personally, are "Very Involved"
 - 45% of senior executives feel they, personally, are "Involved"
 - 10% of senior executives feel they, personally, are "Somewhat Involved"
- ✓ *The more involved executives are, the more successful they feel their companies' volunteer programs are*
 - Executives who consider their personal levels of volunteerism as "Very Involved," feel their companies' volunteer programs are "Successful" (S=6.08)
 - Executives who consider their personal levels of volunteerism as "Involved," feel their companies' programs are "Somewhat Successful" to "Successful" (S=5.76)
 - Executives who consider their personal levels of volunteerism as "Somewhat Involved", feel their companies' volunteer programs are "Successful" (S=5.33)

In other words:

- Senior executives who feel their personal levels of volunteerism are "Very Involved" rate their programs:
 - 6% more successful than the programs of executives who feel they are "Involved"
 - 15% more successful than the programs of executives who feel they are "Somewhat Involved"

WHAT'S INTERESTING TO KNOW...

Based on the research:

- ✓ Generally, the larger the company, the more significant both CR/volunteer managers and executives feel senior management's level of participation/volunteerism is to the overall success of volunteer programs:
 - Executives from companies with more than 100,000 employees consider senior management's involvement 25% more significant to the success of their programs than executives from companies with less than 16,000 employees
- ✓ The larger the company, the more active and involved both CR/volunteer managers and executives rate the level of senior management's participation/volunteerism:
 - Managers from companies with over 60,000 employees consider their senior management to be 10% more active than senior managers from companies with under 60,000 people
 - Executives from companies with over 100,000 employees consider their senior management to be:
 - 5% more active and engaged than those from companies with less than 100,000 employees and
 - 18% more active and engaged than those from companies with less than 16,000 employees
- ✓ The larger the company, the more appropriate CR/volunteer managers consider senior management's current level of participation/volunteerism to be:
 - 68% of managers from companies with over 60,000 employees feel that senior management's current involvement is appropriate versus 38% of managers from companies with under 60,000 people

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW...

- ✓ *Generating senior management buy-in and support is not only key, but also imperative to the success of corporate volunteer programs!*
- ✓ *Senior management buy-in and support benefits volunteer programs, among other things, by:*
 - *Legitimizing/Validating the mission, purpose and value of the program*
 - *Helping secure needed resources such as funding and personnel*
 - *Motivating both employees and managers to volunteer*
- ✓ *The most successful approach or technique for generating senior management support is to get them directly involved in a volunteer project or activity.*
- ✓ *The more involved executives are, the more successful they feel their companies' volunteer programs are.*
- ✓ *To significantly impact the success of corporate volunteer programs, CR/volunteer managers agree that senior management needs to be "Very Involved" in the community:*
 - *Senior management, in general, needs to participate in more events and take a greater leadership role in planning and promoting community service activities*
 - *Senior management, in general, needs to "get their hands dirty," as well as take a more active role recruiting other executives*
 - *Every senior manager needs to participate in at least one, employee-visible event per year*
 - *Every senior executive needs to serve on the Board of Directors of at least one non-profit organization in the community*
- ✓ *Senior executives tend to believe that senior managers are more active and engaged in the community and that management participation is more significant to the overall success of volunteer programs than do CR/volunteer managers.*
- ✓ *The more involved executives feel their fellow executives are (senior management), the more successful they feel their overall programs are.*
- ✓ *76% of senior executives, versus 53% of CR/volunteer managers, also feel that senior management's current level of participation is appropriate.*

BOARD SERVICE

Serving on the Board of Directors of a non-profit organization is a highly specialized form of volunteering whereby volunteers who possess specific skill sets address the needs of non-profit organizations.

Companies encourage managers, and often times employees, to serve on boards of directors, typically, for four main reasons:

1. To help non-profit organizations in disarray and fear of collapse develop sound business practices and effective programs, thus securing the success and survival of the non-profit.
2. To ensure that corporate contributions made to non-profit organizations are put to good use. In short, for oversight purposes.
3. To monitor and influence the activities of the organizations that companies have a strategic interest in, whether in terms of community relations, government relations or consumer affairs.
4. To help develop or hone specific leadership skills for employees/managers seeking to advance within the corporation.

“Board service presents individuals with the opportunity to use their expertise to guide a non-profit organization in such a way that they are: executing to a critical mission, evaluating their performance in executing that mission, and ensuring they are strategic in their services and in their fiscal health. These are skills business people tend to possess and are invaluable for a non-profit organization. Board service can also enhance/build a board member’s skills – there is the opportunity to lead without the gavel of supervision.”

Toni Bailey
VP, Community & Education Relations
The Boeing Company

Although managers have never identified board service as a “key component” of success, nor do they base the success of their volunteer programs on the level of employee and/or management participation on non-profit boards:

In 2001:

- ✓ 81.5% of CR/volunteer managers reported that they encourage/recruit employees and/or managers to serve on the Boards of Directors of non-profit organizations

Today:

- ✓ 87% of CR/volunteer managers report that they encourage/recruit employees and/or managers to serve on the Boards of Directors of non-profit organizations

What this report also found is that:

- ✓ 97% of executives believe employees and/or managers should be actively encouraged/recruited to sit on the Boards of Directors of *local* non-profit organizations
- ✓ 79% of executives believe employees and/or managers should be actively encouraged/recruited to sit on the Boards of Directors of *national* non-profit organizations

"I believe it wouldn't be prudent to encourage senior management to serve on the boards of national non-profits. Xcel Energy is a local company with limited (philanthropic) resources. We feel we can make a greater impact by focusing our resources, and the time and talent of our executives, on assisting local organizations."

John Pacheco, Jr.
Executive Director
Xcel Energy Foundation

Strategic vs. Non-Strategic Boards and Organizations

Recruiting employees and managers to serve on non-profit boards requires carefully matching employees with the appropriate non-profits. Many managers and executives feel organizations need to be strategically-related to their companies' business and/or community relations objectives. Strategically-focused means that a non-profit's mission, goals and services align with the company's values, business goals and service.

"It isn't so much the level of senior management's participation that matters as it is the quality of their participation. Executives need to volunteer in events and with organizations in a purposeful way, ways which best leverage their knowledge, talents and expertise, and those which are strategically-related to the Company."

Patrick Gaston
President
Verizon Foundation

However, not all companies feel it is necessary to encourage employees and managers to serve on the boards of directors of strategically-related organizations. Companies such as Nike are content with simply getting employees and managers active in the community and on boards which they find personally appealing and that will keep them volunteering.

"It is not part of our culture at Nike to tell someone, particularly senior management, that we want them to sit on a particular board. We prefer to meet with the interested senior manager (after they contact us expressing interest) and give them a list of current board opportunities and to talk through those options and discuss boards that may not be on our list. I believe that the decision to sit on a non-profit board should be because one is interested in the agency and the cause, not because the company tells them to participate and be interested. That is why our board placement program has been successful."

Mary Roney
Global Employee Involvement Manager
Nike, Inc.

Based on the research, **the more companies distinguish between strategic and non-strategic boards and/or non-profit organizations, and encourage employees and managers to serve on strategically-related boards/organizations, the more successful they feel their programs are.**

- ✓ 51% of companies **DO** distinguish between *strategic* and *non-strategic* boards (S=6.00)
 - Managers from these companies rate their programs 8% more successful than the programs of their peers whose companies do not distinguish between strategic and non-strategic boards/organizations
- ✓ 49% of companies **DO NOT** distinguish between *strategic* and *non-strategic* boards/organizations (S=5.55)

Tracking of non-profit board service is primarily done via an annual survey. However, some companies, believing that turnover rates are much lower for employees that serve on non-profit boards, track board service on a bi-annual basis.

Vital to successfully serving on a Board of Directors of a non-profit organization is the proper training and support. Unfortunately:

- ✓ Only 30% of companies provide training to management on serving on non-profit boards
- ✓ Only 11% of companies provide training to employees on serving on non-profit boards

The overwhelming majority of companies commonly defer board training to the non-profit organizations themselves. By doing this, companies accomplish very little as “the blind end-up leading the blind.” However, Boeing is one of the companies that sees the need and importance to provide training:

“Organizations go through stages of development and the expectations of board members often ebb and flow with those stages. One can assume fundraising will be a mainstay for a board member – personal contribution as well as assistance with fundraising. Leveraging a member’s knowledge, as well as his or her contacts may be an expectation, as well. Knowing specifically why someone is being asked to be a board member and what is expected of that person is critical. Knowing the organization and its status is also important for a prospective board member who is accepting fiduciary responsibilities. Is this organization financially stable? Are there pending lawsuits? Does the organization carry directors and officers coverage for their board members? These (and others) are all important questions to be asked prior to accepting a board role.”

Toni Bailey
VP, Community & Education Relations
The Boeing Company

As was mentioned earlier:

- ✓ 89% of companies **DO** actively encourage non-profit board service (S=5.78)
 - 32% encourage **both employees and managers** to serve on the boards of **both local and national** non-profit organizations (S=6.15)
 - 24% encourage **both employees and managers** to serve on the boards of **local organizations only** (S=5.90)
 - 22% encourage **only managers** to serve on the boards of **both local and national** non-profit organizations (S=5.44)
 - 20% encourage **only managers** to serve on the boards of **local organizations only** (S=5.38)
 - 2% encourage **only managers** to serve on the boards of **national organizations only** (S=6.00)
- ✓ 11% of companies **DO NOT** actively encourage non-profit board service (S=5.80)

While it may appear on the surface that serving on the Boards of Directors of non-profit organizations may not impact the success of volunteer programs, the truth of the matter is:

- ✓ *The more frequently companies encourage/recruit BOTH employees and management to serve on non-profit Boards, the more successful CR/volunteer managers consider their programs to be:*
 - 56% of companies actively recruit **both employees and managers** to serve on the Boards of Directors of non-profit organizations (S=6.04)
 - 44% of companies recruit **only managers** to serve on the Boards of Directors of non-profit organizations (S=5.44)
- ✓ *The more companies encourage serving on the Boards of Directors of BOTH local and national organizations, the more successful CR/volunteer managers consider their programs to be:*
 - 54% of companies encourage **both local and national organizations** (S=5.87)
 - 44% of companies encourage **only local organizations** (S=5.67)

During the course of the research, CR/volunteer managers were asked, “Does your company provide funding to employees and/or senior managers who sit on the boards of directors of local and/or national non-profit organizations?”

Based on managers’ responses:

- ✓ *Managers from companies that do not provide funding for serving on the Boards of Directors of non-profit organizations consider their programs the most successful*
 - 23% of companies **DO NOT** provide funding to either employees or managers for serving on the Boards of Directors of non-profit organizations (S=6.10)
 - 27% of companies provide funding **only to senior managers** who serve on Boards of Directors of **strategically-related** non-profit organizations only (S=5.42)
 - 20% of companies provide funding **only to senior managers** for serving on the Boards of Directors of **either strategic or non-strategically-related** non-profit organizations (S=5.89)
 - 16% of companies provide funding to **both employees and managers** who serve on the Boards of Directors of **strategically-related** non-profit organizations only (S=5.57)
 - 14% of companies provide funding to **both employees and managers** who serve on the Boards of Directors of **either strategic or non-strategically-related** non-profit organizations (S=5.33)
- ✓ 80% of companies that do not actively encourage serving on non-profit boards provide funding to **both employees and managers** on a case-by-case basis for service on/with **strategically-related boards/organizations only**

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW...

- ✓ ***Promoting non-profit board service as a form of volunteerism can positively impact the success of a volunteer program, especially if:***
 - ***Both employees and management are encouraged to serve on non-profit boards***
 - ***Service on the Boards of Directors of national groups is not discouraged***
 - ***Employees and management serve on the Boards of Directors of non-profits whose missions are strategically-aligned with corporate goals and objectives***
 - ***The company provides training***
- ✓ ***Companies may also experience greater success if:***
 - ***Funding is not automatically made available to employees and/or management who serve on Boards of Directors of non-profit organizations***
 - ***Funding is reserved for participation on strategic boards***

WORK-RELEASE & PAID TIME-OFF POLICIES

In 2001, and again in 2004, CR/volunteer managers overwhelmingly believe that one of the best ways to recruit employees to volunteer, particularly in company-sponsored events and activities, is to provide them with time during the workday.

In 2001:

- ✓ 75% of companies allowed employees to volunteer during the workday

Today:

- ✓ ***85% of companies now allow employees to volunteer during the workday***
- ✓ 15% of companies, however, still discourage employees from volunteering during the workday, many identifying union issues, business demands and corporate culture as the main reasons

“Wal-Mart’s policy is to pay our associates for every minute that they work. If associates are ‘Community Involvement Coordinators’ and their job responsibilities include serving on United Way committees and attending fundraisers, that is considered work – not volunteering. In general, however, we do not offer paid time-off to volunteer, nor do we encourage associates to volunteer on work hours. If we ask associates to participate in a charitable event or fundraiser, we pay them for that time.”

Karen Thompson
Manager
Wal-Mart Foundation

What this study also found is that:

- ✓ 86% of executives believe employees ***SHOULD*** be allowed to volunteer during the workday
- ✓ 10% of executives are ***ADAMENTLY AGAINST*** allowing employees to volunteer during the workday
- ✓ 3% of executives are ***UNSURE*** as to whether or not employees should be allowed to volunteer during the workday

WORK-RELEASE POLICIES...

At present, of the companies that allow employees to volunteer during the workday:

- ✓ 98% of companies encourage employees to **MAKE ARRANGEMENTS WITH SUPERVISORS**, among other things, if they need time during the workday to volunteer

“A flexible (work-release) policy seems to work best for us; one which gives the supervisor the option of granting release time depending on business needs and other factors.”

Dale Harris
Director, Local Initiatives
Prudential Financial

- ✓ 38% of companies also encourage employees to take advantage of **FLEX-TIME POLICIES** if they need time during the workday to volunteer (S=5.93)
 - Managers from these companies rate their volunteer programs 4% more successful than the programs of their peers whose companies don’t offer employees flex-time

“When it comes to a formal work-release policy, it is very difficult to implement and manage one in a manufacturing environment. In its place, we encourage employees to take advantage of the company’s flex-time policy and make arrangements with their managers if they need to take time during the workday to volunteer.”

Allyson Peerman
Director, Community Affairs
Advanced Micro Devices (AMD)

- ✓ 35% of companies maintain **FORMAL RELEASE POLICIES** that govern how employees can take time during the workday to volunteer (S=6.29)
 - 29% of these policies cover company-sponsored events/activities
 - 36% of these policies cover both company-sponsored and personal events/activities
 - 36% of managers did not specify what types of events their policies cover
 - Managers from companies with formal release policies rate their programs 14% more successful than the programs of their peers who do not maintain similar policies

“The absence of a formal volunteer policy leaves employees guessing about what they can support and when they can get involved. A policy should be put in place even if the company does not allow time-off, so that employees know what is acceptable.”

John Kitchens
Manager, External Affairs Services
FPL Group, Inc.

- ✓ 20% of companies also provide employees with **PAID TIME-OFF** to volunteer (S=6.00)
 - Managers from these companies rate their programs 5% more successful than the programs of their peers whose employees are not provided with paid time-off

A growing number of CR/volunteer managers, and a significant number of senior executives, believe it is vitally important that companies develop policies, guidelines and recommendations that not only incorporate employees’ supervisors, but also establish formal criteria that define who, with whom, when, how and how often employees may volunteer, and require sound justification from supervisors when they decline employees’ requests.

In 2001:

- ✓ Only 5% of companies maintained formal volunteer release policies

Today:

- ✓ **35% of companies maintain some sort of formal volunteer release policy**

“Due to the facts that we have a newly branded program, and that employees and teams are being encouraged to volunteer more, a formal policy or statement should be in-place that allows/governs how employees can volunteer during the workday.”

Katharyn Muniz-Bandoni
Manager, Education & Community Relations
Edison International

“Allowing employees to volunteer during the workday should be formalized because it demonstrates the Company’s shared responsibility to the success of the volunteer program.”

Mark Chain
National Director, Recruiting & HR Management
Deloitte & Touche LLP

During the course of the interviews, CR/volunteer managers were asked if current work-release policies and/or practices are appropriate or not. Overwhelmingly, managers feel that current work-release policies and practices are appropriate.

- ✓ 78% of managers feel current work release practices are **APPROPRIATE** (S=5.90/I=5.84)
 - These managers view their volunteer programs as “Successful” and rate their programs 11% more successful than the programs of their peers
 - These managers also feel current work release policies are “Significant” to the success of their companies’ programs – 38% more significant than the current practices of their peers
- ✓ 22% of managers feel current work release practices are **INAPPROPRIATE** (S=5.33/I=4.22)
 - These managers view their volunteer programs as only “Somewhat Successful” and feel that current work release policies are having a “Neutral” impact on the success of their programs
 - Overwhelmingly, these managers either want to greatly clarify current paid leave policies/procedures or implement them corporate-wide

The chart below highlights the percentage of companies that utilize the various work-release practices/policies based on whether or not CR/volunteer managers feel the practices/policies are appropriate or inappropriate.

<u>Release Mechanism</u>	<u>Utilization Rate Appropriate</u>	<u>Utilization Rate Inappropriate</u>
Arrangements With Supervisors	97%	100%
Flex-Time Policy	35%	44%
Formal Release Policy	32%	33%
Paid Time-Off	29%	11%

Based on the chart, providing paid time-off to employees so that they may volunteer during normal business hours is the only significant difference between managers who feel current work-release practices are appropriate and managers who feel current work-release policies are inappropriate.

- ✓ Managers who feel current work-release policies/practices are appropriate are more than twice as likely to offer their employees paid time-off to volunteer than managers who feel current work-release policies/practices are inappropriate
- ✓ As noted previously, managers who feel current work-release policies/practices are appropriate rate their programs 11% more successful than those who feel current work-release policies/practices are inappropriate

Overall, when asked, **CR/volunteer managers feel that allowing employees the opportunity to volunteer during the workday has a greater impact on the overall success of their volunteer programs than do senior executives.** On average, executives believe allowing employees to volunteer during the workday has little or no impact on the overall success of a volunteer program, rating it 4.55 on a 7-point scale (“Neutral” to “Somewhat Significant”). Managers, on the other hand, believe allowing employees to volunteer during the workday is “Somewhat Significant” to the overall success of volunteer programs (I=5.05). If you remove the companies that discourage employees from volunteering during the workday, managers, on average, believe allowing employees to volunteer during the workday is even more significant to the success of their programs (I=5.47) than do senior executives.

WORK-RELEASE POLICIES/PRACTICES’ IMPACT ON SUCCESS

CR/Volunteer Managers

16% “Very Significant”
 24% “Significant”
 11% “Somewhat Significant”
 47% “Neutral Impact”
 2% “Somewhat Insignificant”
 0% “Insignificant”
 0% “Completely Insignificant”

Senior Executives

14% “Very Significant”
 17% “Significant”
 17% “Somewhat Significant”
 28% “Neutral Impact”
 14% “Somewhat Insignificant”
 7% “Insignificant”
 3% “Completely Insignificant”

PROVIDING EMPLOYEES WITH PAID TIME-OFF TO VOLUNTEER . . .

Participants overwhelmingly believe that one of the best ways to recruit employees to volunteer is to provide them with time during the workday. Some companies feel this can be accomplished through the establishment of formal release policies, or by allowing employees to take advantage of their companies' flex-time policies. Others feel the best way to encourage employee volunteerism is to provide them paid time-off to volunteer.

Compensating employees who volunteer in company-sponsored volunteer events, particularly those that take place during the workday, is a hot-bed of contention among corporate community relations professionals. Some feel very strongly about compensating employees who volunteer on behalf of the company.

"Providing paid time-off to employees – even one day per year – demonstrates to them, as well as to our customers, our community partners and the public at-large, that we are truly committed to making our communities better places to live, work and do business."

Julian Brown
Director, Community Relations
Nicor

Managers who support providing employees with paid time-off are in the minority. Most managers feel that volunteering, by definition, is a personal act in which employees freely give of their time and talent, without the expectation of being paid or compensated by their employer. Additionally, some managers feel that providing employees with paid time-off would actually serve to dissuade employees from volunteering more than what the company is willing to pay them for. Still others simply do not support a policy that tells employees with which groups they can and cannot volunteer.

"I do not support the idea of providing employees with paid time-off to volunteer. I believe providing a set amount of paid leave would be too restrictive and would ultimately dissuade employees from volunteering more than what the program would compensate them for. Employees are adults and should be able to manage their own time to create the ability to volunteer."

Mary Roney
Manager, Global Employee Involvement
Nike, Inc.

At present:

- ✓ 83% of companies **DO NOT** provide employees with paid time-off to volunteer (S=6.00)
 - 29% of managers adamantly believe that true volunteerism means not getting paid
 - 25% of managers feel that their programs are already successful and do not see the need to provide employees with paid time-off
 - 17% of managers report that their corporate cultures/work environments just do not support the idea of providing employees with paid time-off
 - 13% of managers believe providing a set amount of paid time-off would discourage employees from volunteering more than what the company is willing to pay them
 - 8% of managers from these companies are concerned about employee abuse
 - 8% of managers from these companies feel that their companies just do not have the financial ability to provide employees with paid time-off to volunteer

- ✓ 17% of all companies **DO** provide employees with paid time-off to volunteer (S=6.00)
 - On average, these companies provide employees with five paid days off to volunteer per year (40.5 hours)
 - The total amount of paid time-off these companies offer varies between 8 and 104 hours per year

“People want to work for a company that provides them the opportunity to give something back to their community and we try hard to facilitate that. Our time-off to volunteer policy makes it clear to our employees, and the communities we are a part of, that Agilent is committed to being a good corporate citizenship.”

Gene Endicott
Director, Public Affairs
Agilent Technologies, Inc.

Based on CR/volunteer managers' responses:

- ✓ ***Providing or not providing employees with paid time-off to volunteer does not affect how managers rate the overall success of their programs***

Whether companies provide employees with paid time-off or not, both CR/volunteer managers and senior executives were asked whether or not they believe their companies *should* provide employees with paid time-off to volunteer.

What the research found is that:

- ✓ 54% of managers from companies that do not currently provide employees with time-off feel their companies **SHOULD**
 - On average, these managers feel that their companies should provide employees with 26 hours of paid leave per year
 - The total amount of paid time-off these managers feel their companies should provide employees varies between 4 and 96 hours per year

"I believe that a company-sponsored volunteer program should provide its employees a specific amount of paid time-off to volunteer in the community. Such a program sends a signal to the employees and the community that the company values volunteering."

Keith Pounds
Regional Volunteer Manager
BellSouth

- ✓ ***Overall, 45% of all managers believe their companies SHOULD provide employees with paid time-off to volunteer***
 - On average, these managers believe their companies should provide employees with four paid days off per year to volunteer (32.6 hours)

A similar percentage of senior executives share CR/volunteer managers' views on whether or not their companies *should* provide employees with paid time-off to volunteer.

- ✓ ***42% of executives feel that their companies SHOULD provide employees with paid time-off to volunteer***
 - On average, these executives feel that employees should be provided with at least one paid day per year to volunteer

“Timberland employees are given the opportunity to spend up to 40 hours of paid time per year to participate in community service activities. We support and encourage our employees to spend their time and talent not only to make great products, but also to make a difference in their communities.”

Bruce Johnson
SVP, Human Resources
The Timberland Company

- ✓ 48% of executives, however, feel that their companies **SHOULD NOT** provide employees with paid time-off to volunteer
 - 36% of these executives believe paid leave policies dissuade employees from volunteering beyond what the company is willing to pay them
 - 21% of these executives believe that providing paid leave is not volunteerism

“A formal program which provides employees with a set amount of paid time-off to volunteer will set an artificial limit on the amount of service employees will perform. Furthermore, providing employees with paid time-off to volunteer isn’t ‘volunteering.’”

Robert “Bob” Corcoran
Vice President, Corporate Citizenship
General Electric Company

- 14% of these executives feel that it is financially impossible for their companies to provide employees with paid time-off
- 7% of these executives feel that their programs are already successful and do not see the need to provide employees with paid time-off
- 21% of these executives declined to comment

“Providing employees with paid time-off to volunteer is not a matter of choice for us. Fluor is unable to provide employees with paid time-off mainly because the company is too deadline-driven to be able to allow this. Plus, the nature of the business (profit margins) simply won’t allow this.”

J. Robert Fluor, II
Vice President, Corporate & Public Affairs
Fluor Corporation

- ✓ 10% of executives are **UNDECIDED** as to whether or not their companies should provide employees with paid time-off to volunteer

Overall, **neither CR/volunteer managers nor senior executives, on average, feel paid leave policies significantly impact the overall success of their companies' volunteer programs one way or the other.** On average, managers feel providing employees with paid time-off to volunteer has a "Neutral" impact on the overall success of their volunteer programs ($I=4.18$), while executives, on average, believe paid leave policies are "Somewhat Insignificant" to the overall success of their volunteer programs ($I=3.38$).

PAID LEAVE POLICIES' IMPACT ON SUCCESS

CR/Volunteer Managers

17% "Very Significant"
 6% "Significant"
 6% "Somewhat Significant"
 45% "Neutral Impact"
 11% "Somewhat Insignificant"
 4% "Insignificant"
 11% "Completely Insignificant"

Senior Executives

4% "Very Significant"
 8% "Significant"
 19% "Somewhat Significant"
 12% "Neutral Impact"
 27% "Somewhat Insignificant"
 23% "Insignificant"
 8% "Completely Insignificant"

"There are a handful of companies that I know of that provide paid time-off for employees to volunteer. I respect those policies and they seem like great perks, but I don't think they are a necessary element of an outstanding volunteer program. In a way, it just seems counter intuitive that employees should be paid to 'volunteer.'

At American Express, we encourage department heads to be flexible and to allow employees to use flex-time to volunteer, so in many areas we have employees who might volunteer in the morning or at lunch time, or leave early and then just make up the time. We also have many departments that use volunteer activities for team building – our volunteer coordinator makes numerous matches for team projects here in NYC, and it also happens in other areas of the company. In this sense, employees are volunteering on company time. We also plan all of our company-sponsored activities on the weekends or in the evenings, to make it more convenient for our employees to volunteer, and often times their families join them, which makes it a great experience for everyone."

Mary Beth Salerno
 President
 American Express Foundation

However, it should be noted that managers from companies that do provide employees with paid time-off to volunteer feel that this is “Significant” to “Very Significant” to the overall success of their companies’ volunteer programs ($I=6.25$), whereas managers from companies that do not provide employees with paid time-off, and who feel their companies should not provide employees paid time-off, feel that doing so would be “Somewhat Insignificant” to the overall success of their programs ($I=2.92$).

Furthermore, executives who feel that their companies should provide employees with paid time-off feel paid time-off is “Somewhat Significant” to the overall success of volunteer programs ($I=4.58$), whereas executives who feel that their companies should not provide employees with paid time-off feel paid time-off is “Insignificant” to “Somewhat Insignificant” to the overall success of their programs ($I=2.57$).

WHAT’S INTERESTING TO KNOW...

Based on the research:

- ✓ The more successful managers and executives consider their programs, the greater the impact/influence they feel providing employees with paid time-off is to that success:
 - Managers who feel their programs are “Very Successful,” believe providing employees with paid time-off to be:
 - 7% more significant to the success of their programs than managers who feel their programs are “Somewhat Successful”
 - 96% more significant to the success of their programs than managers who feel their programs are “Neutral”
 - Executives who feel their programs are “Very Successful,” believe providing employees with paid time-off to be:
 - 15% more significant to the success of their programs than executives who feel their programs are “Successful”
 - 47% more significant to the success of their programs than executives who feel their programs are “Somewhat Successful”
- ✓ In general, the smaller the company, the more frequently executives believe employees should be provided with paid time-off for volunteer purposes
- ✓ Also, the smaller the company, the more significant executives believe providing employees with paid time-off is to the overall success of their programs:
 - Executives from companies with fewer than 60,000 employees feel providing paid time-off is 23% more significant to the overall success of their programs than executives from companies with over 60,000 employees

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW...

- ✓ *Overwhelmingly, both CR/volunteer managers and senior executives believe that one of the best ways to recruit employees to volunteer is to allow them to volunteer during the workday:*
 - *85% of companies now allow employees to volunteer during the workday*
 - *86% of executives support allowing employees to volunteer during the workday*
- ✓ *Of the companies that allow employees to volunteer during the workday:*
 - *98% of companies encourage employees to make arrangements with supervisors*
 - *38% of companies encourage employees to take advantage of flex-time policies*
 - *35% of companies maintain formal release policies*
 - *20% of companies also provide employees with paid time-off to volunteer*
- ✓ *Managers who feel current work-release policies/practices are appropriate are more than twice as likely to offer their employees paid time-off to volunteer than managers who feel current work-release policies/practices are inappropriate.*
- ✓ *45% of all managers believe their companies should provide employees with paid time-off to volunteer during the workday. On average, these managers believe their companies should provide employees with four paid days off per year to volunteer (32.6 hours).*
- ✓ *42% of executives feel that their companies should provide employees with paid time-off to volunteer. On average, these executives feel that employees should be provided with at least one paid day per year to volunteer.*
- ✓ *Regardless whether or not managers and executives believe employees should, or should not, be provided with paid time-off, based on their responses, the benefits of doing so are unclear. On the one hand, managers and executives from companies that provide employees with paid time-off feel this practice significantly impacts the success of their programs. On the other hand, managers from companies that do not provide employees with paid time-off feel that their programs are just as successful as the programs that do provide employees with paid time-off.*
- ✓ *In the end, the best thing CR/volunteer managers can do in terms of allowing employees to volunteer during the workday is to establish a formal volunteer release policy that outlines the duties and responsibilities of both employees and their supervisors.*

EDUCATION, COMMUNICATIONS AND TRAINING

To attain a high level of employee involvement, companies need to invest time and resources on: educating and training employees and management, at the very least, on the importance of volunteerism and on how to get involved; and maintaining active, on-going internal communications to keep them abreast of current volunteer events.

NOTE: For the purposes of this report, “education” and “training” refer to the transfer of knowledge and information through active and direct interaction between CR/volunteer staffs and employees and management. “Internal communications” refers to the transfer of knowledge through often passive and indirect interaction between CR/volunteer staffs and employees and management. Furthermore, “education” and “training” differ from one another in the sense that through “education,” employees and management are provided with general information about the volunteer program (e.g. why the company values volunteerism, how to get involved, where to go to learn about up-coming events/activities, work-release policies, etc.), whereas through “training,” employees and management are taught how to actually do something related to volunteering (e.g., planning events, recruiting co-workers, serving on Boards of Directors, etc.).

EDUCATION AND TRAINING . . .

All too often, companies and their CR/volunteer staffs assume that there is nothing easier on earth than volunteering – “that it’s a snap!” – and make the fatal flaw that since they know what volunteerism is and how to do it that everyone else does too. This simply is not the case. For an employee who has never volunteered before, is volunteering in a new activity for the first time, or is from a culture that does not espouse corporate volunteerism, volunteering may present a significant challenge! These types of employees may not know where to start, how to get involved or even see the point of volunteering.

Over the past three years, the CR/volunteer managers that educate employees and management on the various aspects of their volunteer programs, provide training on how to plan and organize volunteer events and activities, and prepare both to serve on the Board of Directors of non-profit organizations has nearly doubled!

In 2001:

- ✓ Only 35% of companies provided some sort of volunteer-related education and/or training to employees and/or management

Today:

- ✓ ***64% of companies provide some sort of volunteer-related education and/or training to employees and/or management***

Furthermore:

- ✓ *Nearly one in ten managers (9%) consider Education and Training as a “key component” to the overall success of their volunteer programs*

All-in-all:

- ✓ 51% of companies educate employees about their volunteer programs (S=5.96)
 - CR/volunteer managers from these companies rate their programs:
 - 6% more successful than the programs of their peers who do not educate employees and
 - 8% more successful than the programs of their peers who do not provide any form of education or training to either employees or management
- ✓ 30% of companies train management to serve on non-profit boards (S=5.93)
 - CR/volunteer managers from these companies rate their programs 7% more successful than the programs of their peers who do not provide any form of education or training to either employees or management
- ✓ 28% of companies offer training to employees on how to plan and organize volunteer events and activities, as well as on how to recruit co-workers (S=5.69)

“Comprehensive program and technology training is mandatory for all IBM volunteers participating in IBM Mentor Place. IBM volunteers need to understand the program’s objectives, what’s expected of them, and where they can go for help and support. They must also understand policies and procedures, background on the school and students, and other information specific to the program, including how to use the Web-based communications tool created for the program.

Perhaps most importantly, while we know that our employees are effective researchers and consultants, they don’t necessarily know how to engage a 12-year-old online! Training of mentors also ensures that employees are provided with the tools they need to understand how best to engage a student on-line in a way that enhances classroom learning and provides students with the support and guidance they require.”

Diane Melley
On Demand Community Project Director
IBM Corporation

- ✓ 28% of companies educate management on their overall volunteer programs (S=6.08)
 - Managers from these companies rate their programs:
 - 7% more successful than the programs of their peers who do not educate management on overall programs and
 - 10% more successful than the programs of their peers who do not provide any form of education or training to either employees or management
- ✓ 11% of companies train employees to serve on non-profit boards (S=5.80)
 - Managers from these companies rate their programs 5% more successful than the programs of their peers who do not provide any form of education or training to either employees or management

Statistically speaking, when the views and opinions of all CR/volunteer managers are taken into consideration, ***Education and Training*** is “Somewhat Insignificant” to the overall success of volunteer programs (I=3.53).

EDUCATION AND TRAINING’S IMPACT ON SUCCESS – MANAGERS

11% “Very Significant”
 11% “Significant”
 11% “Somewhat Significant”
 30% “Neutral Impact”
 2% “Somewhat Insignificant”
 0% “Insignificant”
 36% “Completely Insignificant”

HOWEVER . . . when the 36% of companies that do not provide any sort of volunteer-related education or training to either employees or management is removed from the equation – those same companies who rated ***Education and Training*** as “Completely Insignificant” – the impact ***Education and Training*** has on the success of volunteer programs is considerably different.

In short:

- ✓ ***CR/volunteer managers from companies that do provide volunteer-related education and training to employees and/management consider Education and Training to be “Somewhat Significant” to the success of their volunteer programs. (I=4.97)***

INTERNAL COMMUNICATIONS...

In addition to training employees, key to recruiting and retaining employees is knowing what information they need to know, developing the right messages to convey this information and utilizing the correct mediums; in other words, knowing what to say, how to say it and to whom! Successful programs communicate general information on the program and how to get involved, and typically entice employees by selling them on the various benefits of the program. This information is provided on a consistent basis so that messages are not easily forgotten. In short, companies need to have a highly developed communications plan and marketing strategy in place to continually recruit and retain new and existing employee volunteers.

Overall, senior executives believe active, on-going internal communications is more significant to the overall success of their programs than do CR/volunteer managers. On average, senior executives believe active, on-going internal communications are “Very Significant” to the overall success of a volunteer program ($I=6.55$), whereas managers believe active, on-going internal communications are “Significant” ($I=5.80$) to overall success.

INTERNAL COMMUNICATIONS’ IMPACT ON SUCCESS

<u>CR/Volunteer Managers</u>	<u>Senior Executives</u>
28% “Very Significant”	62% “Very Significant”
38% “Significant”	31% “Significant”
23% “Somewhat Significant”	7% “Somewhat Significant”
6% “Neutral Impact”	0% “Neutral Impact”
4% “Somewhat Insignificant”	0% “Somewhat Insignificant”

While both CR/volunteer managers and senior executives feel internal communications is key to the success of their programs, it is unclear why executives feel internal communications has a much greater impact on success than do CR/volunteer managers. The best explanation the research points to is that an overwhelming number of managers feel that they can always do a better job in terms of internal communications, no matter how good current efforts may be. In short, it is possible that executives feel that their managers are doing a better job at internal communications than managers think they are doing.

During the course of the interviews, CR/volunteer managers were asked to identify which internal audiences they communicate with, the mediums they use to reach these audiences and the pieces of information they share.

Internal Audiences

Based on the research:

- ✓ ***Both CR/volunteer managers and senior executives feel Active, On-Going Internal Communications impacts the success of corporate volunteer programs:***
 - 100% maintain communications with ***Employees*** (S=5.79)
 - 96% maintain communications with ***Junior- and Mid-Level Managers*** (S=5.82)
 - Managers from these companies rate their programs 14% more successful than the programs of their peers
 - 89% maintain communications with ***Senior Management*** (S=5.79)
 - Managers from these companies rate their programs 11% more successful than the programs of their peers
 - 43% maintain communications with ***Retirees*** (S=5.60)
 - 36% maintain communications with ***Shareholders*** (S=5.76)
 - 30% maintain communications with the ***Board of Directors*** (S=5.71)

Communications Mediums

- ✓ ***CR/volunteer managers and senior executives agree that the more a company attempts to share information with internal audiences – the more mediums it uses – in general, the more successful volunteer programs will be.***
 - 98% of companies use ***E-mails*** to share information (S=5.83)
 - 94% of companies use ***Corporate Intranet Sites*** (S=5.82)
 - 79% of companies use ***Posters/Flyers*** (S=5.70)
 - 66% of companies use ***E-newsletters*** (S=5.77)
 - 60% of companies use ***Employee Publications*** (S=6.04)
 - 60% of companies use ***Employee Orientations*** (S=5.93)
 - 57% of companies use ***Kick-offs/Rallies*** (S=5.89)
 - 47% of companies use ***Paper Newsletters*** (S=5.77)
 - 40% of companies use ***Closed Circuit TV/Electronic Bulletin Boards*** (S=5.74)
 - 26% of companies use ***Mailers*** (S=6.17)
 - 21% of companies use ***Kiosks/Information Booths*** (S=6.10)

Based on their responses, managers that utilize the following communications mediums to share information with various internal audiences rate their programs 4% - 46% ***MORE SUCCESSFUL*** than the volunteer programs of their peers who do not share the same communications mediums:

- ✓ E-mails to share information = 46% more successful
- ✓ Employee Publications = 11% more successful
- ✓ Corporate Intranet Sites = 9% more successful
- ✓ Mailers = 9% more successful
- ✓ Kiosks/Information Booths = 7% more successful
- ✓ Employee Orientations = 6% more successful
- ✓ Kick-offs/Rallies = 4% more successful

Data/Information

- ✓ *In general, CR/volunteer managers and senior executives agree that the more information that is shared with internal audiences, the more successful volunteer programs will be*
 - 94% post/share ***Contact Information*** (S=5.86)
 - 91% post/share information on ***Up-Coming Company-Sponsored Events*** (S=5.74)
 - 83% post/share ***Sign-up/Membership Information*** (S=5.90)
 - 83% post/share ***Human Interest/News Stories*** (S=5.79)
 - 70% post/share the ***Results/Impact of their Volunteer Programs*** (S=5.76)
 - 68% post/share information on ***Up-Coming Non-Company Events*** (S=5.95)
 - 62% post/share information on ***Dollars for Doers Programs*** (S=5.90)
 - 53% post/share information on ***Volunteer Award Programs*** (S=6.08)
 - 51% post/share ***Volunteer Policies and Guidelines*** (S=5.88)
 - 32% post/share ***Work-Release Policies*** (S=6.13)
 - 23% post/share their ***Volunteer Mission Statements*** (S=6.09)
 - 17% post/share information on their ***Paid Time-off Policies/Programs*** (S=6.25)

Based on their responses, managers that share the following pieces of data/information internally rate their programs 3% - 25% **MORE SUCCESSFUL** than the volunteer programs of their peers who do not share the same pieces of data/information:

- ✓ Contact Information = 25% more successful
- ✓ Sign-up/Membership Information = 12% more successful
- ✓ Volunteer Award Programs = 12% more successful
- ✓ Paid Time-off Policies/Programs = 10% more successful
- ✓ Work-Release Policies = 8% more successful
- ✓ Volunteer Mission Statements = 7% more successful
- ✓ Up-Coming Non-Company Events = 5% more successful
- ✓ Dollars for Doers Programs = 5% more successful

During the course of the research, CR/volunteer managers were, however, asked whether or not the current internal communications practices and approaches are appropriate, and what, if anything, they would like done differently.

Based on CR/volunteer managers' responses:

- ✓ 83% feel current internal communications practices are **APPROPRIATE** (S=5.95/I=6.00)
 - These managers rate their programs 19% more successful than the programs of their peers who feel current internal communications practices are inappropriate
 - These managers also feel that their companies' internal communications practices have a greater impact on the success of their programs (26% more effective) than what the internal communications practices of their peers' has on the success of their companies' volunteer programs
- ✓ 17% feel current internal communications practices are **INAPPROPRIATE** (S=5.00/I=4.75)

Internal Audiences

- ✓ ***CR/volunteer managers who feel current internal communications practices are appropriate, versus those who feel they are inappropriate, focus internal communications on groups other than just employees***

- ✓ In particular, CR/volunteer managers who feel current internal communication practices are appropriate share information on their volunteer programs with their **Senior Management, Boards of Directors** and **Shareholders** to a much greater degree than those CR/volunteer managers who feel current internal communications practices are inappropriate

Communications Mediums

- ✓ ***Managers who feel current internal communications practices are appropriate, in general, simply utilize more mediums than their peers who feel current internal communications practices are inappropriate***
- ✓ In particular, CR/volunteer managers who feel current internal communication practices are appropriate utilize **Electronic Newsletters, Mailers, E-mails, Corporate Intranet Sites, Employee Publications, New Employee Orientations Kiosks/Information Booths,** and **Mailers** to a much greater degree than those CR/volunteer managers who feel current internal communications practices are inappropriate

Data/Information

- ✓ CR/volunteer managers who feel current internal communications practices are appropriate are more apt to share/print **Sign-Up Information, Human Interest/News Stories, Program Results/Impact, Volunteer Policies and Guidelines,** and **Information on Upcoming, Non-Company Sponsored Events/Activities** than CR/volunteer managers who feel current internal communications practices are inappropriate
- ✓ Managers whose companies maintain **Volunteer Mission Statements, Work-Release Policies, Dollars for Doers Programs, Paid Time-Off Programs** and **Volunteer Award Programs** should consider sharing/posting details and information on these programs if they do not already

WHAT'S INTERESTING TO KNOW...

Education & Training

Based on the research:

- ✓ Two-out-of-three companies with fewer than 12,000 employees do not provide employees or managers with any sort of training related to volunteerism
- ✓ One-out-of-three companies with over 75,000 employees do not provide employees or managers with any sort of training related to volunteerism

Internal Communications

Based on the research:

- ✓ The larger the company:
 - The greater they actively share information with shareholders
 - The more likely it has and utilizes closed circuit TV to promote volunteerism (74% 40,000+ = 51% of participants)
 - The more likely managers share personal/human interest stories with employees, as well as results
 - The greater the impact managers believe internal communications plays
- ✓ No company under 7,000 reaches out to retirees
- ✓ The largest and smallest companies tend to include information in employee publications
- ✓ The smaller the company, the less likely it is to post contact information

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW...

- ✓ *Generating and sustaining a high level of employee participation is vital to the success of every corporate volunteer program.*
- ✓ *Through education, training and active, internal communications, CR/volunteer managers can significantly impact the level of employee participation, as well as the overall success of their programs.*
- ✓ *Over the past three years, the number of CR/volunteer managers that actively provide volunteer-related education and training to both employees and management has nearly doubled from 35% to 64%.*
- ✓ *Managers from companies that provide Education and Training consider it to be “Somewhat Significant” to the overall success of corporate volunteer programs.*
- ✓ *While all forms of education and training can impact the success of volunteer programs, most companies tend to focus on educating employees on the basics (i.e., where to find volunteer opportunities, how to sign-up, who to contact, etc.). Some also: train management to serve on the Boards of Directors of non-profit organizations; train employees to plan events and recruit co-workers; and educate management on volunteering and the volunteer program.*
- ✓ *While results will vary from company to company, current research indicates that managers can significantly impact the success of their volunteer programs by not only sharing information with employees, but junior-, senior- and mid-level managers, business partners, the Board of Directors and shareholders.*
- ✓ *Current research also indicates that the more communications tools/mediums managers utilize to share information with internal audiences, the more successful their programs will be. In particular, a diversified combination of print, electronic and verbal communications works best, especially e-mails, electronic newsletters, employee publications, corporate intranet sites, mailers, kiosks/information booths and new employee orientations.*
- ✓ *Lastly, managers and executives both agree that the more information they share with internal audiences, the more successful their volunteer programs will be. In particular, the most important information companies can share with their employees, managers and other internal audiences include: contact information, sign-up/membership information, up-coming company events and, if applicable, information on volunteer award programs, Dollars for Doers programs, paid time-off programs, work-release policies and volunteer mission statements.*

RECOGNITION

Recognizing employees for their commitment of time and talent is not only a nice thing to do, but in the eyes of most CR/volunteer managers and senior executives, it is mandatory. Recognizing employees for their service not only serves to demonstrate how much the company values this act of giving, but also serves as an effective means to retain current volunteers, recruit others and raise overall awareness for the program. In short, recognition says thank you to the volunteers and incents non-volunteers to become involved.

“Recognition programs are an important component of acknowledging the differences our employees have made in the lives of others. Recognition also serves as a means of encouraging volunteers to continue their community service work, recruits others not yet involved, and communicates that we, as a company, value this act of giving.”

Elinore Robey
Senior Manager
The Charles Schwab Foundation

In the 2001 study:

- ✓ 92% of companies actively recognized employees for their volunteer efforts

Today, nearly every company recognizes the importance of saying thank you:

- ✓ 98% of companies now actively recognize/thank employees for volunteering
- ✓ 93% of companies also recognize volunteers in local/field offices in a similar fashion as they do volunteers from corporate headquarters
 - However, companies that leave volunteer recognition to the discretion of local/field offices consider their programs 8% more successful than their peers
- ✓ 93% of companies also recognize managers who volunteer and consider their programs to be 3% more successful than those companies that do not

What the research also found was that:

- ✓ 100% of senior executives feel that employees, as well as managers, ***SHOULD*** be recognized for the time and talent they contribute through volunteering

“Volunteerism at Target is made possible by good people. Good people are attracted to Target for many reasons, one of which is our culture of giving back to the community. I know that our employees are volunteering in ways that the company never sees, and Target may not be involved. Our Team Members are not volunteering to make a difference in their careers; they’re volunteering to make a difference in their world.”

John Griffith
SVP, Property Development
Target Corporation

In general, there are two forms of recognition: formal and informal.

Formal Recognition is the utilization of an annual, company-wide initiative that recognizes select employees, typically on a competitive basis, and is coordinated/managed at the corporate-level. Generally, there are three types of formal recognition programs: cash award programs, event-oriented programs and gift award programs. Cash award programs recognize individuals or teams of employees for their outstanding community service by donating a cash award in the form of a grant to a non-profit organization of the employee or employees’ choosing. Event-oriented programs recognize employee service by hosting an event in their honor. Events may range in formality from an off-site black-tie dinner, to an on-site breakfast in the cafeteria, to treating outstanding volunteers and/or volunteer coordinators to a baseball game. Typically, gift award programs operate on a point system, recognizing and rewarding employees for their community service by allowing them to purchase various “gifts” based on the number of hours they volunteered or the number of events in which they participated.

“Recognizing employees’ contributions of helping local non-profit organizations is an important part of a corporate employee volunteer program. Washington Mutual provides recognition with an on-line point system. Employees receive one point each time they report their volunteer time and then redeem those points for great corporate/volunteer merchandise. Washington Mutual also recognizes exceptional team projects once a quarter in each geographic region of the country.”

Marcia Long
Assistant Vice President
Washington Mutual

Informal Recognition is the on-going, day-to-day recognition of employee volunteers, coordinated/managed at the local or business unit level that may vary from one location to the next. Informal recognition is a simple, easy, low-cost way to make volunteering fun, keep employees coming back and prevent burnout. Common examples of informal recognition include: verbal recognition (i.e. saying thank you), written recognition (e.g., thank you notes or e-mails), internal publicity (e.g., articles in employee newsletters, volunteer of the month board, etc.), external publicity (e.g., articles in local newspapers), in-kind support (e.g., transportation, covering entry fees, equipment, supplies, etc.), small giveaways (e.g., t-shirts, key chains, pins, stress-balls, etc.), tickets (e.g., theatre, movie, sporting events, etc.), providing food at or after events (e.g., ice cream socials), including employees' volunteer service in their personal records and providing volunteers either with additional training or leadership roles within volunteer programs.

When asked, CR/volunteer managers identified the following as those recognition techniques they most readily use to thank employee volunteers.

LEADING VOLUNTEER RECOGNITION TECHNIQUES

1. Verbal and/or Written Thank You Notes/E-mails (96%)
2. Inexpensive Giveaway Items (89%)
3. Informal Recognition Events/Socials (72%)
4. Certificates of Appreciation (67%)
5. Annual Volunteer Award Programs (61%)
6. Formal Recognition Events (59%)
- Dollars for Doers Programs (59%)

(%) denotes the percentage of participants that provided this response

Managers from companies that thank volunteers using the following recognition techniques rate their programs 2% - 7% **MORE SUCCESSFUL** than the volunteer programs of their peers who do not thank or recognize volunteer in the same manner.

- ✓ Annual Volunteer Award Programs = 7% more successful
- ✓ Dollars for Doers Programs = 7% more successful
- ✓ Inexpensive Giveaway Items = 5% more successful

During the course of the interviews, both CR/volunteer managers and senior executives were asked, “*Is the current level of, or approaches to, recognizing volunteers appropriate?*” The research found:

	<u>Managers</u>	<u>Executives</u>
Appropriate	66%	86%
Inappropriate	33%	10%
Don’t Know	N/A	3%

- ✓ By a nearly nine-to-one margin, 86% of senior executives are happy with how volunteers are currently recognized, many believing that employees volunteer, and will continue to volunteer, regardless of recognition
- ✓ By a two-to-one margin, CR/volunteer managers are happy with how employees are currently recognized for their volunteer service
- ✓ Overall, CR/volunteer managers who feel current volunteer recognition is appropriate consider their programs 15% more successful than those managers who feel current recognition levels/approaches are inappropriate

The chart below highlights the percentage of managers who thank employee volunteers through the utilization of various recognition techniques, broken out by whether or not they feel their companies’ current internal communications practices are appropriate or not.

<u>Recognition Techniques</u>	<u>Utilization Rate</u>	<u>Utilization Rate</u>
	<u>Appropriate</u>	<u>Inappropriate</u>
Verbal and/or Written Thank You Notes/E-mails	97%	93%
Certificates of Appreciation	81%	40%
Inexpensive Giveaway Items	97%	73%
Informal Recognition Events/Socials	81%	53%
Formal Recognition Events	71%	33%
Dollars for Doers Programs	61%	53%
Annual Volunteer Award Program	74%	33%

Based on CR/volunteer managers’ responses:

- ✓ CR/volunteer managers who feel current volunteer recognition levels/approaches are appropriate are more than twice as likely to utilize *Certificates of Appreciation*, *Formal Recognition Events* and *Annual Volunteer Award Programs* than managers who feel current volunteer recognition levels/approaches are inappropriate

- ✓ CR/volunteer managers who feel current volunteer recognition levels/approaches are appropriate utilize *Informal Recognition Events/Socials*, *Inexpensive Giveaway Items* and *Dollars for Doers programs* 15% - 53% more so than managers who feel current volunteer recognition levels/approaches are inappropriate

Overall, both senior executives (I=5.78) and CR/volunteer managers (I=5.38) believe that volunteer recognition is “Somewhat Significant” to “Significant” to the overall success of a volunteer program, albeit executives feel it is somewhat more significant than managers.

RECOGNITION’S IMPACT ON SUCCESS

CR/Volunteer Managers

22% “Very Significant”
 36% “Significant”
 13% “Somewhat Significant”
 20% “Neutral Impact”
 7% “Somewhat Insignificant”
 0% “Insignificant”
 2% “Completely Insignificant”

Senior Executives

28% “Very Significant”
 28% “Significant”
 31% “Somewhat Significant”
 3% “Neutral Impact”
 3% “Somewhat Insignificant”
 3% “Insignificant”
 3% “Completely Insignificant”

One plausible reason why managers do not feel recognition is as significant to the success of their programs as executives, maybe that 33% of managers feel current recognition levels/approaches are inappropriate and that their companies need to do more. Furthermore, even a portion of those managers who do feel their volunteer recognition is appropriate also believe that their companies can do more to thank employees.

Additionally:

- ✓ The more successful CR/volunteer managers rate their programs, the greater the impact they feel volunteer recognition has. Unfortunately, this is not necessarily true for senior executives and the research cannot definitively explain why.

CR/Volunteer Managers

<u>Program Success</u>	<u>Recognition Impact</u>	<u>I-vale</u>
Very Successful	Significant	6.00
Successful	Significant	5.67
Somewhat Successful	Somewhat Significant	5.20

Senior Executives

<u>Program Success</u>	<u>Recognition Impact</u>	<u>I-vale</u>
Very Successful	Significant	6.00
Successful	Somewhat Significant	5.33
Somewhat Successful	Significant	5.67

Based on CR/volunteer managers' responses, the following chart showcases which recognition techniques impact the overall success of volunteer programs the most:

<u>Recognition Technique</u>	<u>Significance</u>	<u>I-value</u>
Formal Recognition Events	Significant	6.19
Annual Volunteer Award Program	Significant	6.00
Certificates of Appreciation	Significant	5.77
Informal Recognition Events/Socials	Significant	5.67
Dollars for Doers Programs	Significant	5.67
Inexpensive Giveaway Items	Significant	5.63
Verbal and/or Written Thank You Notes/E-mails	Somewhat Significant	5.45

DOLLARS FOR DOERS PROGRAMS...

A ***Dollars for Doers*** program is a type of contributions program that donates cash grants to qualified non-profit organizations based on the level of employee involvement, typically as volunteers or board members. When Dollars for Doers programs were first created, their original purposes were two-fold: as an alternative to the Matching Gifts program for employees who could donate time, but not dollars; and to act as a catalyst in motivating employees to participate in volunteer events and activities. Dollars for Doers programs were never intended to function as “formal” recognition programs. However, in recent years, more and more companies have implemented Dollars for Doers programs as a way to recognize employees for their community involvement.

Matching Gift Program, Volunteer Component. In a Matching Gift program, companies match employee donations to qualifying non-profit organizations or schools on a ratio basis, usually 1 to 1, to a maximum amount. Some companies, in lieu of developing a separate Dollars for Doers program, or to support small or non-existent local contributions budgets, will add a volunteer component to their existing matching gifts program. Now, in addition to matching employee donations of cash, companies also match employee donated hours with a cash value.

- ✓ 43% of the companies that participated in this study support Dollars for Doers programs that reward/match employee service on a straight dollar per hour basis
 - On average, these programs reward/match employee service at \$11/hr up to a maximum of \$1,000 per employee per year
 - The rates at which these programs reward/match employee service vary from \$2.50/hr to \$20/hr with a maximums varying between \$750 and \$5,000 per employee per year
 - Teams of employees are typically treated the same under these types of programs

- ✓ 17% of the companies maintain Dollars for Doers programs and recognize/award employee service via an application process
 - These companies base the value of the grants they award on a combination of the time employees volunteer, the types of activities they do/services they perform, and the types of organizations they volunteer with
 - Grants typically range from \$500 to \$1,000 per organization, per year
 - Teams of four or more employees can typically apply for grants ranging between \$1,000 and \$2,000

What was interesting to learn was that:

- ✓ ***97% of senior executives believe their companies should financially support the volunteer activities and are in favor of establishing Dollars for Doers program***
 - 29% of senior executives believe, however, that these programs should only apply to strategic, pre-selected activities and organizations

“Having a Dollars for Doers program both motivates and rewards employees who volunteer. Employees who know about the program, love it, and take advantage of it, often.”

Allyson Peerman
Director, Community Affairs
Advanced Micro Devices (AMD)

THE NON-PROFIT PERSPECTIVE ON RECOGNITION...

The non-profit participants were asked to comment on how their organizations recognize volunteers.

- ✓ Less than 10% of non-profit organizations consider volunteer recognition as a “key component” of a successful volunteer program, but...
- ✓ 97% of non-profits actively thank/recognize volunteers for their service

Overall, non-profit participants identified 16 unique forms of recognition which they use to thank volunteers. On average, non-profits utilize four to five of the techniques listed below, although the number of recognition techniques an individual non-profit uses ranges from two to ten.

NON-PROFIT TECHNIQUES TO RECOGNIZING VOLUNTEERS

1. Thank You Notes, Letters and Cards (95%)
2. Verbal “Thank You’s” (87%)
3. Newsletter and Web Site Mentions/Stories (66%)
4. Inexpensive Giveaway Items (53%)
5. Informal Recognition Events/Socials (50%)
6. Formal Recognition Events (29%)
7. Volunteer of the Year Awards (26%)
8. Certificates of Appreciation (13%)
9. Providing Food at Volunteer Events (11%)

(%) denotes the percentage of participants that provided this response

Additional recognition techniques include birthday cards; thank you notes/cards from clients; publicly thanking volunteers at events; submitting stories to local media about volunteers; letters of appreciation to volunteers’ managers/supervisors; soliciting and implementing volunteer feedback; and letting volunteers take on more responsibility in running the organization.

- ✓ ***Formal Recognition Events*** are typically hosted by non-profits with smaller operating budgets and staffs:
 - 64% operate on budgets of \$1.3M or less
 - 55% maintain staffs of fewer than 18 people
- ✓ The smaller the operating budget and staff size the more frequently non-profits present ***Volunteer of the Year Awards*** to show their appreciation.
 - 70% maintain staffs of fewer than 25 people
 - 60% operate on budgets of \$900,000 or less

- ✓ 80% of the non-profits that issue *Certificates of Appreciation* have operating budgets over \$2M and 60% employ more than 80 people

In addition to recognizing volunteers, representatives for non-profit organizations were asked how, if at all, they recognize companies for providing volunteers. Overall, non-profit participants identified 14 unique techniques for recognizing corporate partners. On average, non-profits recognize their corporate partners utilizing three to four of the techniques listed below. Interestingly:

- ✓ 11% of non-profits **DO NOT** actively thank companies for providing volunteers
 - All of these companies employ between 40 and 100 people, and maintain operating budgets between \$4.7M and \$2.2M.

NON-PROFIT TECHNIQUES TO RECOGNIZING COMPANIES

1. Thank You Letters to Community Relations Leaders (84%)
2. In-House Communications Mediums (68%)
3. Plaques & Awards (32%)
4. Event Signage/Sponsorships (32%)
5. Thank You Notes/Letters to CEO's/Senior Executives (26%)
6. Formal Recognition Events (13%)
7. During/At Public Speaking Engagements (13%)
8. Nominating Corporations for Local Awards (11%)

(%) denotes the percentage of participants that provided this response

- ✓ *In-House Communications Mediums* refers to brief notes or mentions in newsletters, press releases or annual reports, or on the organization's web site.
- ✓ Two-thirds of non-profits that recognize corporations through *Event Signage or Sponsorships*, meaning that companies have to purchase these, possess operating budgets over \$1.3M.

WHAT'S CR/VOLUNTEER MANAGERS NEED TO KNOW...

- ✓ *Both executives and managers agree that recognizing employees for their commitments of time and service is significant to the overall success of volunteer programs.*
- ✓ *The more successful a program is, the greater the impact recognition seems to have on success.*
- ✓ *In particular, the larger a company, the greater the impact volunteer recognition has on success according to managers and executives.*
- ✓ *If CR/volunteer managers are looking to improve their overall volunteer programs, or simply better recognize volunteers, they should consider:*
 - *Recognizing managers who volunteer, if they do not already*
 - *Establishing an Annual Volunteer Award program*
 - *Implementing a Dollars for Doers program*
 - *Hosting a Formal Recognition Event on an annual basis*
 - *Issuing Certificates of Appreciation to outstanding volunteers and coordinators*
- ✓ *CR/volunteer managers should not be surprised if they get a lot of push-back from senior management when it comes to expanding recognition efforts, as nearly 90% of executives feel current recognition levels are appropriate.*
- ✓ *However, 97% of senior executives believe their companies should financially support volunteerism and are in favor of implementing Dollars for Doers programs.*

EXTERNAL COMMUNICATIONS

While it has been proven that in order to be successful, companies need to actively share information with employees and other internal audiences, sharing information on the company's community service with external audiences is also important. External communications, if managed properly, can successfully build brand awareness, enhance the company's image as an "Employer of Choice," aid in the recruitment of new employees, generate positive exposure and publicity for the company, strengthen overall community relations, and positively impact the company's image as a "Good Corporate Citizen." In short, just as a tree falling in the forest goes unheard if no one is there to listen, the best volunteer program in the world will miss its mark if no one knows about it.

Overall, **senior executives feel active, external communications are more significant to the overall success of their companies' volunteer programs than do CR/volunteer managers.** On average, executives believe active, on-going external communications are "Somewhat Significant" to the overall success of a volunteer program ($I=4.66$). Managers, on the other hand, feel active external communications have a "Neutral" impact on the overall success of their volunteer programs ($I=4.33$).

EXTERNAL COMMUNICATIONS' IMPACT ON SUCCESS

CR/Volunteer Managers

9% "Very Significant"
 11% "Significant"
 25% "Somewhat Significant"
 32% "Neutral Impact"
 11% "Somewhat Insignificant"
 6% "Insignificant"
 6% "Completely Insignificant"

Senior Executives

17% "Very Significant"
 10% "Significant"
 28% "Somewhat Significant"
 21% "Neutral Impact"
 7% "Somewhat Insignificant"
 3% "Insignificant"
 10% "Completely Insignificant"

Based on the earlier findings of this report, there is no evidence that would suggest that senior executives would feel external communications are more significant to the success of their programs than CR/volunteer managers. First, managers, not executives, feel their companies should support/value volunteerism because it tends to enhance community relations, as well as the company's image as a "good corporate citizen." Second, managers are twice as likely as senior executives to evaluate success based on their programs' abilities to enhance the company's image as a "good corporate citizen," as well as to positively impact brand awareness/recognition and generate recognition from various community groups. Furthermore, managers, in terms of goals and objectives, reported being more concerned than senior executives with the level of external communications as it relates to increasing brand awareness, generating external awareness and visibility, winning third-party recognition and enhancing the company's image as a "good corporate citizen."

Regardless:

- ✓ 90% of senior executives **STRONGLY SUPPORT** actively sharing information with external audiences with respect to their companies' volunteer programs and activities (S=5.90 / I=4.96)
 - These executives feel that their volunteer programs are "Successful," and rate them 4% more successful than the programs of their peers who are not supportive of sharing information with external audiences
 - The executives also consider active, external communications to be 148% more influential/significant to the success of the programs than their peers who are not in favor of actively sharing information with external audiences

"It is imperative to communicate the global volunteer success stories around the world, both internally and externally, to enhance the company's image and build momentum for additional projects."

J. Robert Fluor, II
Vice President, Corporate & Public Affairs
Fluor Corporation

- ✓ Only 10% of senior executives **OPPOSE** actively sharing information on their volunteer programs and initiatives with external audiences (S=5.67/ I=2.00)
 - Overwhelmingly, these executives feel that actively sharing information with external audiences on any community relations activity goes against their corporate cultures

Interestingly:

- ✓ *The more successful executives consider their programs to be, the greater the impact/role they feel external communications has/plays in generating that success*

At present:

- ✓ 85% of companies **DO MAINTAIN** active external communications with respect to volunteerism and community relations (S= 5.90 / I=4.45)
 - Managers from these companies rate their programs 18% more successful than the programs of their peers who do not share information with external audiences
- ✓ 15% of companies, however, **DO NOT MAINTAIN** active external communications with respect to volunteerism and community relations (S= 5.00)

“We only share information on our volunteer events/activities with external audiences only if requested. Other than that, we see no compelling reason to do so.”

Anonymous

During the course of the interviews, CR/volunteer managers from companies that maintain external communications were asked to identify which external audiences they communicate with, the mediums they use to reach these audiences and the pieces of information they share.

External Audiences

Based on the research:

✓ *In general, the more people companies share information with, the more successful corporate volunteer programs are, according to CR/volunteer managers. However, sharing information with certain audiences, such as the media, although important, has no visible impact on a company’s volunteer program.*

- 88% maintain communications with *Non-profit Partners* (S=6.03)
- 85% maintain communications with *The Media* (S=4.82)
- 80% maintain communications with *The General Public* (S=5.81)
- 75% maintain communications with *Potential Employees* (S=5.97)
- 75% maintain communications with *Community Leaders* (S=5.93)
- 70% maintain communications with *Community Groups* (S=5.82)
- 68% maintain communications with *Customers/Clients* (S=6.00)
- 65% maintain communications with *Elected Officials* (S=5.96)
- 30% maintain communications with *Suppliers/Vendors* (S=6.25)

Based on their responses, managers who reach out and share information about their volunteer programs with their non-profit partners and suppliers/vendors rate their programs 8%-16% **MORE SUCCESSFUL** than the volunteer programs of their peers who do not communicate with these audiences:

- ✓ Non-profit Partners = 16% more successful
- ✓ Suppliers/Vendors = 8% more successful

Surprisingly, however, managers who actively share information about their volunteer programs with the following external audiences rate their programs **LESS SUCCESSFUL** than the volunteer programs of their peers who do not try to communicate with the same people:

- ✓ The Media = 12% less successful
- ✓ General Public = 9% less successful
- ✓ Community Groups = 6% less successful

Communications Mediums

Based on the research:

- ✓ *While the ability to successfully deliver data/information on a company's volunteer program and initiatives varies from medium to medium, in general, it appears that the majority of external communications mediums that CR/volunteer managers currently use have little impact on the success of those programs and/or activities*
 - 85% of companies use *Annual Reports* (S=5.91)
 - 85% of companies use *Corporate Internet Site* (S=5.74)
 - 83% of companies use *Press Releases* (S=4.76)
 - 65% of companies use *Non-profit Partners* (S=5.92)
 - 63% of companies use *Media Advisories* (S=6.00)
 - 38% of companies use *Print Advertisements/PSAs* (S=5.88)
 - 38% of companies use *E-mails* (S=5.80)
 - 35% of companies use *Recruitment Events* (S=5.64)
 - 28% of companies use *Mailings* (S=5.92)
 - 20% of companies use *Industry/Trade Events* (S=5.63)
 - 18% of companies use *Speakers Bureau* (S=5.57)
 - 13% of companies use *Radio Advertisements/PSAs* (S=5.60)
 - 5% of companies use *TV Advertisements/PSAs* (S=4.50)

Current external communications mediums may be ineffective at reaching audiences and delivering messages/information as CR/volunteer managers who use the following mediums rate their programs 6% – 17% **LESS SUCCESSFUL** than the volunteer programs of their peers who do not use the same mediums:

- ✓ Press Releases = 17% less successful
- ✓ TV Advertisements/PSAs = 11% less successful
- ✓ Speakers Bureau = 7% less successful
- ✓ Radio Advertisements/PSAs = 6% less successful

Data/Information

Based on the research:

- ✓ *While specific messages or pieces of information impact the success of volunteer programs differently, in general, the more data/information companies share with external audiences regarding their volunteer programs and activities, the more successful their programs and/or activities are, according to CR/volunteer managers*
 - 70% post/share **Human Interest/News Stories** (S=5.89)
 - 65% post/share **Program Awards and Recognition** (S=5.92)
 - 65% post/share **Program Impacts/Results** (S=5.85)
 - 58% post/share **Program Statistics** (S=6.41)
 - 48% post/share **Up-coming Company Events** (S=6.10)
 - 43% post/share **Dollars for Doers Program** (S=6.06)
 - 33% post/share **Award Program** (S=5.92)
 - 20% post/share **Volunteer Mission Statements** (S=6.13)
 - 20% post/share **Sign-up Information** (S=6.00)
 - 13% post/share **Paid Time-off Program** (S=5.80)
 - 13% post/share **Up-coming Non-Company Events** (S=5.67)
 - 8% post/share **Release Time Policies** (S=5.67)

Based on their responses, managers that share the following pieces of data/information externally rate their programs 6%-8% **MORE SUCCESSFUL** than the volunteer programs of their peers who do not share the same pieces of data/information:

- ✓ Program Statistics = 8% more successful
- ✓ Up-coming Company Events = 6% more successful

During the course of the research, CR/volunteer managers were also asked whether or not the current external communications practices and approaches are appropriate or not, and what, if anything, they would like to see done differently.

Based on CR/volunteer managers' responses:

- ✓ 63% of managers feel current external communications efforts are **APPROPRIATE** (S=6.08 / I=5.00)
- ✓ 37% of managers feel current external communications efforts are **INAPPROPRIATE** (S=5.67 / I=3.73)

External Audiences

- ✓ CR/volunteer managers who feel current external communications practices are appropriate direct external communications towards ***Customers and Clients, Potential Employees, Community Groups, Suppliers and Vendors***, and their own ***Non-profit Partners*** more so than managers who feel current external communications practices are inappropriate.

Communications Mediums

- ✓ Although it would appear that current communications mediums are have little to no impact on the success of corporate volunteer programs, CR/volunteer managers who feel current external communications practices are appropriate utilize ***Corporate Intranet Sites, Press Releases, E-mails, Recruitment Events*** and their ***Non-profit Partners*** to share information with external audiences more so than their peers who feel current external communications practices are inappropriate.

Data/Information

- ✓ A greater percentage of managers who feel current external communications practices are appropriate share ***Programs Awards & Recognition, Program Results & Impact(s)*** and ***Up-coming Company Events*** with external audiences compared to managers who feel current external communications practices are inadequate.
- ✓ Furthermore, managers whose companies maintain ***Volunteer Award Programs, Volunteer Mission Statements, Paid Time-off Policies*** and ***Work-Release Policies*** may want to consider sharing this information with external audiences if they do not already, especially if they feel current external communications practices are inappropriate.

WHAT'S INTERESTING TO KNOW...

Based on the research:

- ✓ The larger the company, the more influence/impact managers believe active external communications have on the overall success of the program
- ✓ 33% of companies with fewer than 12,000 employees do not engage in active external communications

WHAT CR/VOLUNTEER MANAGERS NEED TO KNOW...

- ✓ *Sharing information with external audiences, if managed properly, can help to generate a number of benefits for companies, assist CR/volunteer managers achieve many of their long- and short-term goals and objectives, and significantly impact the overall success of volunteer programs. Sharing information:*
 - *Builds brand awareness*
 - *Generates positive visibility for the company*
 - *Strengthens community relations*
 - *Enhances the company's image as a "good corporate citizen"*
- ✓ *While results will vary from company to company, current data indicate that managers impact the success of their companies' volunteer programs the most by sharing information with Non-profit Partners, Suppliers & Vendors, Customers & Clients, and Potential Employees.*
- ✓ *Furthermore, while results will vary from company to company, sharing information on Program Statistics, Up-coming Company Events, Dollars for Doers programs and Volunteer Mission Statements appear to have the greatest impact on the success of corporate volunteer programs.*
- ✓ *Unfortunately, according to the research, it is unclear which mediums, if any, are truly effective at communicating information on a company's volunteer program with external audiences.*
- ✓ *Given that 90% of senior executives support the idea of actively sharing information on their companies' volunteer programs and activities, CR/volunteer managers should not hesitate to try new and innovative approaches to reach external audiences.*

CHAPTER 4:

PREDICTING SUCCESS

INTRODUCTION

The overarching aim of this study is to help companies determine the success of their corporate volunteer programs and to identify the issues they should focus on to improve their programs. Up to this point, we have: identified the value and benefits of volunteerism; explained how companies define success and how they evaluate the success of their programs; outlined the “key components” necessary for a successful program; explored the intricacies of many of those “key components;” and highlighted what, specifically, about each component contributes to the success of volunteer programs. The objective of this chapter, then, is to try and bring everything together and identify those variables or factors that are most likely to predict the success of corporate volunteer programs.

To determine the best “predictors of success,” the I-values CR/volunteer managers and senior executives assigned to various “key components” were run through separate regression analyses against the S-values they assigned their overall programs. Once again, the “I-value” is the degree or strength of a “key component” to impact the overall success of a volunteer program, while the “S-value” represents how successful managers and executives feel their volunteer programs are.

NOTE: A “key component’s” ability to predict success does not make it any more or less important or significant to the ultimate success of a corporate volunteer program. For managers with limited time, money and human resources with which to run their programs, the “predictors of success” simply highlight those “key components” they should focus on most.

CR/VOLUNTEER MANAGERS

The following represent the “key components” CR/volunteer managers were explicitly asked to rate in terms of their abilities to impact overall success:

- | | |
|-----------------------------------|----------------------------|
| • Staffing Levels | • Work-Release Policies |
| • Program Structures | • Providing Paid Time-off |
| • Budget Levels | • Recognition |
| • Employee Participation | • Internal Communications |
| • Senior Management Participation | • External Communications |
| • Training | • Measurement & Evaluation |

These independent variables were taken from the list of “key components” originally identified in LBG Associates’ 2001 study, *Corporate Volunteerism: Innovative Practices for the 21st Century*. Although CR/volunteer managers were given the option to identify and rate additional components, which they feel significantly impact the success of their volunteer programs, **nine out of ten CR/volunteer managers feel this list does in fact represent the “key components” of success.** The following are the average raw scores managers rated each individual component’s ability to impact success:

IMPACT ON SUCCESS – MANAGERS

13. Employee Participation (I=6.69)
14. Active, Internal Communications (I=5.80)
15. Program Structures (I=5.62)
16. Measurement & Evaluation (I=5.51)
17. Recognition (I=5.38)
18. Senior Management Participation (I=5.27)
19. Work-Release Policies (I=5.04)
20. Training (I=4.97)*
21. Budget Levels (I=4.84)
22. Staffing Levels (I=4.78)
23. External Communications (I=4.30)
24. Providing Paid Time-Off (I=4.18)

** denotes the impact Training has on success
for those companies that provide it*

Without much surprise, CR/volunteer managers rate ***Employee Participation*** as the having the greatest impact on the success of their volunteer programs. Coming in second and third are ***Active, Internal Communications*** and ***Program Structures***, two “key components” which both have a significant impact on ***Employee Participation***, as well as on the success of volunteer programs.

Managers rate ***Measurement & Evaluation***, which includes tracking participation and soliciting feedback, as well as ***Recognition, Senior Management Participation, Work-Release Policies*** (the ability for employees to volunteer during the workday) and ***Training*** (which includes education) to be “Somewhat Significant” to the overall success of volunteer programs. As indicated earlier in the report, the more companies have of each, the more successful managers rate their programs.

Budget and ***Staffing Levels***, according to CR/volunteer managers, have a mediocre impact on success. On average, managers feel budgets and staffs are less than “Somewhat Significant” to the overall success of their programs. However, many also feel that current levels are inappropriate. If managers had more money to spend on their programs and more people to manage their programs, in all likelihood, they would probably consider ***Budget*** and ***Staffing Levels*** as having a greater impact.

At present, ***External Communications*** and ***Providing Employees with Paid Time-off***, in the eyes of CR/volunteer managers, contribute very little to the success of corporate volunteer programs. On average, managers feel that these components have a “Neutral” impact on the overall success of their programs.

When the individual “I-values” CR/volunteer managers gave to each “key component” is run through a regression analysis and compared to the scores they gave to the overall success of their programs (i.e., “S-values”), a very different view on success is generated:

PREDICTORS OF SUCCESS – MANAGERS

1. Recognition (99.86%)
2. Program Structures (94.91%)
3. Budget Levels (81.08%)
4. Employee Participation (78.13%)
5. External Communications (75.18%)
6. Providing Paid Time-Off (68.02%)
7. Work-Release Policies (52.14%)
8. Internal Communications (45.44%)
9. Training (40.67%)
10. Staffing Levels (13.21%)
11. Measurement & Evaluation (13.17%)
12. Senior Management Participation (3.09%)

(%) represents the component’s ability to independently predict success

NOTE: For the purpose of the regression analysis, the levels of success managers rated their programs (S-values) were used as the dependent variables, while the I-values of the 12 “key components” were treated as independent variables.

Accuracy

The P-value in the Analysis of Variance (ANOVA) table produced by the regression analysis is 0.0003, which is less than 0.01, indicating that there is a statistically significant relationship between “success” and the “key components” at the 99% confidence level. In lay men’s terms, by using these 12 “key components,” the LBG Associates’ model can predict the success of corporate volunteer programs – *for CR/volunteer managers* – with more than a 99.07% degree of accuracy.

Appropriateness

Furthermore, the R-squared statistic produced by the regression analysis is 75.8462% which means that that our model can explain 75.8462% of the variability in “success.” In other words, 76% of the success of corporate volunteer programs, according to CR/volunteer managers, can be explained by the LBG Associates’ model (*Recognition, Program Structures, Budget & Staffing Levels, Employee & Senior Management Participation, Internal & External Communications, Measurement & Evaluation, Work Release Policies, Providing Paid Time-off and Training*).

Analysis

Surprisingly, while CR/volunteer managers may feel the level of *Employee Participation* has the greatest impact on success, *Recognition, Program Structures* and *Budget Levels* can independently predict the success of corporate volunteer programs to a much higher degree of accuracy.

Recognizing or thanking employees for their commitment of time and talent is the leading “predictor of success.” According to the results of the regression analysis, the level of *Recognition*, by itself, can predict the success of a volunteer program with nearly a 100% degree of accuracy (P=0.0014). How a volunteer program is structured comes in a close second, with *Program Structures* able to predict, by itself, overall success with nearly a 95% degree of accuracy (P=0.0509). And the amount companies spend to support volunteer programs and initiatives – *Budget Levels* – can independently demonstrate the success of a volunteer program with an 81% degree of accuracy (P=0.1892).

While CR/volunteer managers may consider *Employee Participation* to be “Highly Significant” to the success of their programs, this “key component” can predict the success of corporate volunteer programs with only a 78% degree of accuracy (P=0.2187). This is most likely due to the fact that nearly 50% of CR/volunteers do not know the true number or percentage of employees who volunteer.

Although managers, on average, feel *External Communications* and *Paid Time-Off* have a “Neutral” impact on the success of their programs, these two “key components” can predict the success of volunteer programs with a rather high degree of accuracy. The degree to which companies share information with external audiences can predict the success of volunteer programs nearly as well as *Employee Participation*, with a 75% degree of accuracy ($P=0.2482$), while the act of providing employees with *Paid Time-Off* can independently predict the success of corporate volunteer programs with a 68% degree of accuracy.

Work-Release Policies ($P=0.4833$), *Training* ($P=0.5933$) and, surprisingly, *Internal Communications* ($P=0.5456$) are all weak “predictors of success.” When viewed independently, *Work-Release Policies* have slightly better than a 50/50 chance at predicting the success of a volunteer program, while *Training* (which includes Education) has slightly better than a 41% chance to predict success, correctly. *Internal Communications*, which is considered by CR/volunteer managers to be one of the top two “key components” to the success of volunteer programs, has only a slightly less than 50/50 chance to independently predict the success of corporate volunteer programs. This should not necessarily worry CR/volunteer managers, for like the age-old saying goes, “You can lead a horse to water, but you can’t make it drink,” CR/volunteer managers can share all the information in the world with employees regarding events and activities, but they can’t force them to volunteer.

Staffing Levels ($P=0.8679$), *Measurement and Evaluation* ($P=0.8683$) and *Senior Management Participation* ($P=0.9691$), while all valid “predictors of success” when used in concert with the other “key components,” cannot independently predict success very well at all. When the results of the regression analysis are combined with CR/volunteer managers’ remarks, the analysis indicates that current *Staffing Levels* and *Measurement and Evaluation* practices, across the board, are inadequate or ineffective at most companies. Furthermore, while *Senior Management Participation* is important, their actual level of volunteerism cannot explain employees’ levels of volunteerism. In the end, however, it should be reiterated that while *Staffing Levels*, *Measurement and Evaluation* and *Senior Management Participation* may not be able to predict success, they are necessary in order for volunteer programs to be successful.

SENIOR MANAGEMENT

To determine which “key components” are the best “predictors of success” in the minds of senior management, executives were also asked to assign I-values to a specific set of “key components” which were then run through a regression analysis. The list of “key components” senior executives were asked to rate in terms of their impact on success included:

- Internal Communications
- External Communications
- Budget Levels
- Staffing Levels
- Work-Release Policies
- Providing Paid Time-Off
- Recognition
- Senior Management Participation

Senior executives were not asked to rate *Training* and *Program Structures* because it was assumed that they would have limited knowledge of these components. This decision was validated by the fact that not one executive raised the issue of providing volunteer-related training to employees or commented on how their volunteer programs are structured during their telephone interviews.

Senior executives were also not asked to rate *Employee Participation* or *Measurement & Evaluation* in terms of their impact on success. Given the fact that nearly half of all managers do not know the level of *Employee Participation* at their companies, the chances were pretty good that even fewer senior executives would actually know this. Since current *Measurement & Evaluation* practices cannot effectively predict success for managers, we assumed that it would not be all that useful in predicting success for senior executives.

IMPACT ON SUCCESS – EXECUTIVES

1. Active, Internal Communications (I=6.55)
2. Staffing Levels (I=6.24)
3. Budget Levels (I=6.17)
4. Recognition (I=5.78)
5. Senior Management Participation (I=5.76)
6. External Communications (I=4.66)
7. Work-Release Policies (I=4.55)
8. Providing Paid Time-Off (I=3.38)

Accuracy

The P-value in the Analysis of Variance (ANOVA) table produced by the regression analysis for senior executives is 0.0249, which is less than 0.03, indicating that there is a statistically significant relationship between the success of a volunteer program and eight components at the 97% confidence level.

Appropriateness

However, the R-squared statistic produced by the regression analysis is 59.0509%, which means that only 59% of senior executives' views on the success of their volunteer programs can be explained by the eight components listed above.

Analysis

Although the senior executives were not asked to rate exactly the same number of components, and their regression analysis may not be able to explain as much as the CR/volunteer manager analysis, this does not mean the findings are any less useful. According to the regression analysis done for senior executives, the following are the leading “predictors of success:”

PREDICTORS OF SUCCESS – EXECUTIVES

1. External Communications (98.06%)
2. Budget Levels (92.46%)
3. Internal Communications (79.79%)
4. Recognition (72.82%)
5. Work-Release Policies (69.33%)
6. Staffing Levels (65.83%)
7. Providing Paid Time-Off (24.18%)
8. Senior Management Participation (22.16%)

(%) represents the component's ability to independently predict success

External Communications (P=0.0194) and **Budget Levels** (P=0.0754) are the two best “predictors of success” for senior executives, and, similar to CR/volunteer managers, **Senior Management Participation** (P=0.7784) is the worst “predictor of success.”

In contrast to CR/volunteer managers, senior executives' views on **Paid Time-Off** (P=0.7582) cannot predict the success of corporate volunteer programs all that well, while **Work-Release Policies** (P=0.3067) can, with nearly a 70% degree of accuracy.

Senior executives and CR/volunteer managers also have significantly different views on **Staffing Levels** and **Internal Communications**. What the regression analysis demonstrates is that current **Staffing Levels** and **Internal Communications** practices are strong “predictors of success” for senior executives, but not for managers.

Recognition (P=0.2718), which is considered by senior executives to be “Significant” to the success of a corporate volunteer program, is also a strong “predictor of success,” independently possessing the ability to predict success with nearly a 73% degree of accuracy.

CONCLUSION

The ultimate lesson of this chapter, and of this study, should be:

The success of a corporate volunteer program cannot, nor should not, be based solely on the level of employee participation, but rather on how well the program is managed against its goals and objectives.

There is no doubt in our minds, as well as in the minds of 90% of the CR/volunteer managers surveyed, that the 12 “key components” identified originally in LBG Associates’ 2001 study on corporate volunteerism – *Staffing Levels, Program Structures, Budget Levels, Employee Participation, Senior Management Participation, Training, Work-Release Policies, Providing Paid Time-off, Recognition, Internal Communications, External Communications* and *Measurement & Evaluation* – are all vital to the success of corporate volunteer programs. What is also important to know is that these 12 components can accurately predict or calculate the actual success of corporate volunteer programs with a 99% level of confidence.

Given that most CR/Volunteer managers have limited time, money and human resources to dedicate to their volunteer programs, based on the research, it is recommended that they focus their efforts on the following “key components:”

- | | |
|----------------------|---------------------------|
| ✓ Recognition | ✓ Internal Communications |
| ✓ Program Structures | ✓ Work-Release Policies |
| ✓ Budget Levels | |

By establishing a structure which makes it easy for employees to get involved, as well as want to get involved; by educating and informing them about the program, up-coming events and activities, and how to get involved; by providing opportunities for employees to get involved/volunteer during the workday; and by recognizing volunteers for their involvement/commitment of time and energy; companies will not only significantly increase employee participation, but they will visibly see a significant increase in the overall success of their corporate volunteer programs. To achieve success, CR/volunteer managers will also need to secure adequate funding for volunteer programs and initiatives, funding which senior management may be more willing to provide than managers may think they are.

And, although it may prove to be extremely difficult, CR/volunteer managers should also strive to generate *Senior Management Participation* and revamp current *Measurement and Evaluation* practices (especially in terms of tracking), for doing so may also have a tremendous impact on the success of corporate volunteer programs, as it would on any other corporate function.

NOTES

NOTES