



# Engaging Employees in the Community

*How To Establish Employer-Supported Volunteerism In Your Company*

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## Erratum

The following text was inadvertently omitted from p. 64 of *Engaging Employees in the Community*. It belongs in Phase Five, Step 2: Decide on Process.

Volunteer Canada regrets any inconvenience.

## 2. Outcome Evaluation

While we encourage you to create outcome statements as a general best practice for any evaluation effort, this particular form of evaluation is best used when the purpose of the ESVI is to address a specific social issue or problem. The reason to evaluate an ESVI in this manner is to determine what types of impacts it had on the issue.

<b>Advantages of Outcome Evaluation</b>	<b>Disadvantages of Outcome Evaluation</b>
<ul style="list-style-type: none"><li>• Encourages the company to establish clear goals at the outset so the ESVI team can focus on the benefits of the initiative and the long-term effects it will address</li></ul>	<ul style="list-style-type: none"><li>• It is the most complex evaluation method</li><li>• It may diminish the importance of less tangible measures of success, such as increased employee morale, and pride</li><li>• It requires more detailed record keeping than other methods</li></ul>



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The United Nations General Assembly proclaimed 2001 the International Year of Volunteers (IYV). With its main objectives of increased recognition, facilitation, networking and promotion of volunteering, the International Year of Volunteers 2001 provides a unique opportunity to highlight the achievements of the millions of volunteers worldwide and to encourage more people globally to engage in volunteer activity.

The premise underlying IYV 2001 is that voluntary service is called for more than ever before to tackle areas of top concern in the social, economic, cultural, humanitarian and peace-building fields and that more people are needed to offer their services as volunteers. For this to happen, there is a need for greater recognition and facilitation of volunteer work and greater promotion of such service, drawing upon the best initiatives and efforts — the "best practices" — of volunteers networked to the greatest effect.

This document is inspired by our country's rich tradition of volunteerism and by the principles of IYV 2001. Its purpose is to help companies develop employer-supported volunteer initiatives.



## Thinking of Establishing Employer-Supported Volunteerism in Your Company?

It is estimated that more than two thirds of Canada's volunteers are members of the paid work force. The workplace, therefore, is an ideal location to connect with and engage potential volunteers. An employer-supported volunteer initiative represents a tremendous opportunity for businesses to make a difference in the community, to prove their commitment to good corporate citizenship and to increase profitability through the personal and professional development of employees.

Employer-supported volunteers are a remarkable resource. They are committed to helping others in the community, they want to learn new things and be active participants. They want to work for a company that supports their community involvement. They also want to be involved in a way that clearly and explicitly meets their needs, enabling them to address serious issues in the community. An employer-supported volunteer initiative may be just what's needed in your company.

The purpose of this resource is to provide you the basic framework for promoting, developing, implementing, evaluating and sustaining an employer-supported volunteer initiative (also referred to in this document as an ESVI).

The key to the success of an ESVI is the same as any other business initiative. Your employer-supported volunteer initiative must have:

- the support of senior management and other company leaders;
- clear goals that align with business goals;
- clear direction or focus area;
- adequate resources to be successful; and
- clear benchmarks to evaluate and measure success.

*What makes an ESVI stand out from other business initiatives? To succeed, it must be owned and driven by employees.*



Your first step is to do some preliminary research to determine what type of ESVI would be a good fit for your company. We'll take a look at what's out there and provide information to help you make your decision. There are a number of variables to consider, as well as the challenges and benefits associated with any employer-supported volunteer initiative.

Once you have examined the variables, looked at the options for involvement and decided an ESVI is a worthwhile endeavour, you can report your findings to senior management. The goal is to gain their endorsement to proceed with the deeper research necessary for the development of the ESVI plan.

To make strategic decisions about what constitutes the employer-supported volunteer initiative, you need to identify your stakeholders, their vested interests and their needs. A stakeholder is any person or any group that is affected by or can affect the activities of the ESVI. For our purposes, stakeholders are broken into two groups:

1. Internal stakeholders: employees, company
2. External stakeholders: community at large

There are many ways to get the answers you seek from internal stakeholders, such as surveys, focus groups, and internal/external communication tools (email, Intranet, website and print newsletters). Using these tools can help you discover:

- what volunteer activities the employees are currently engaged in;
- what employees would like to do, how often and for how long;
- the expectations of senior management; and
- how these activities could be aligned with company business objectives.

Answers to these and other questions will help you determine the level of stakeholder interest in developing an ESVI. If interest is minimal, you can choose to stay with current company/employee volunteer activities or choose from a variety of periodic volunteer activities that align with company objectives. Minimally, you just need to lay out some guidelines and policies to better support these activities and assign an individual to manage the process. If research indicates a stakeholder desire for greater engagement, you can proceed to the in-depth development stage.



Up until this point, the work you have done can be described as “top down.” As a middle manager, you have approached your research from the company's point of view. Should you decide to move on to develop and implement a structured ESVI, understand that the process now becomes “bottom up.” It is most important to involve your employees in all stages, from development through evaluation. Even the best crafted ESVI will fail if your employees are not engaged. At the end of the day it is employees, not management, who drive a successful ESVI.

The remainder of this document is geared toward supporting an employee-driven effort to create, implement and manage a strategic, sustainable ESVI.

Assuming employee interest in company supported volunteerism is high, the next step is to assemble a planning team/volunteer committee made up of motivated employees from various departments in your company. Selection criteria for the team are outlined for you.

Now your team can begin to build the business plan for the ESVI. Follow the series of steps we have outlined, including:

1. Structuring and organizing
2. Scope and goals
3. Guidelines and policies
4. Mission statement
5. Naming the ESVI
6. Community consultation, selection and project(s) creation
7. Resource identification
8. Getting the green light

To make the plan work, there are communication and marketing issues to be addressed. These include:

- Challenges
- Understanding communication basics
- Reaching internal and external audiences (launching the ESVI)
- Sustaining the momentum



Also important to success is implementing a system of reward and recognition.

Last but not least, a means of tracking and evaluating the ESVI is integral to its success and longevity.

The steps presented in this resource can be easily followed. We have included examples along the way to show how other companies are succeeding. A case study is included at the end of the document along with additional resources.

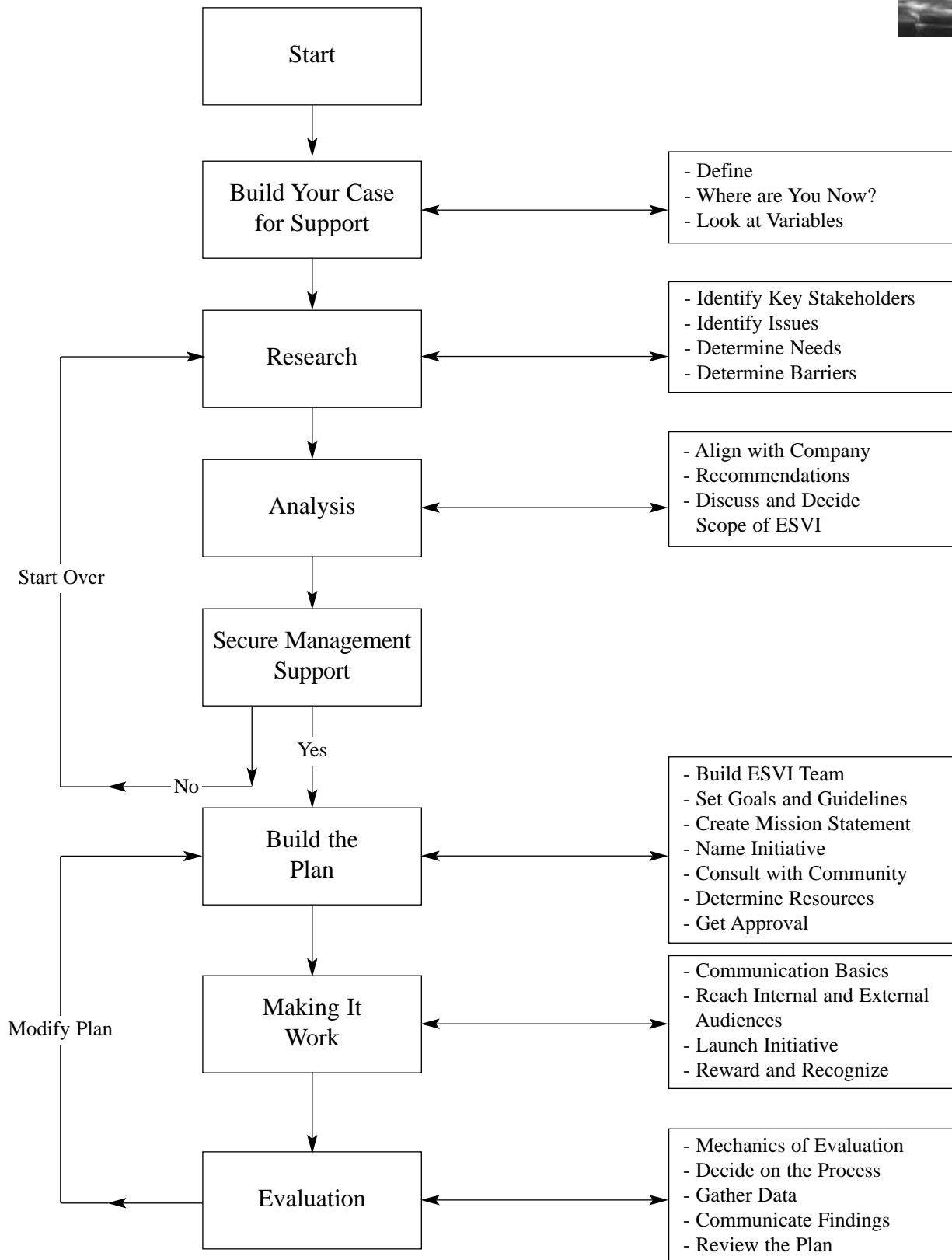
The result of your efforts will be the creation of an appropriate and empowering employer-supported volunteer initiative that can produce measurable benefits for the company, employees and the community.

*“At its essence, volunteering is about leadership. The collective leadership of Suncor, the We Care Connection organizing team and our many volunteers has resulted in a powerful employee volunteer team benefiting the Calgary community. The success of the We Care Connection gives the confidence to grow volunteerism across Suncor and to consider new ways of involving employees’ families, youth and seniors in volunteering.”*

Greg MacGillivray  
Chair, We Care Connection  
Suncor Energy Inc. (Calgary)



## Employer-Supported Volunteer Initiatives Process Overview





## Why We Value Employer-Supported Volunteer Initiatives

In recent times, there has been an increased awareness of the importance of growing social capital as well as economic capital. There is a renewed focus on the rights and responsibilities of being good citizens. Volunteerism is a key ingredient in building a strong community and ultimately a strong civil society in which citizens take great pride and responsibility for themselves, their families and their neighbourhoods. In a civil society, citizens — individual, corporate and government — assume joint responsibility for promoting economic, social and environmental well being.

## Challenges and Opportunities

The need for engaged volunteers is greater than ever. According to the National Survey of Giving, Volunteering and Participating released by Statistics Canada in August 2001, Canada has one million fewer volunteers today than it had in 1997.

Did you know that in Canada seven per cent of volunteers contribute 73 per cent of all volunteer hours? The Statistics Canada report says that those who continue to volunteer are putting in more hours. But how long can this core group keep up the pace? There are other disturbing trends such as the fact that most volunteer hours come from older, religiously involved individuals — a fast disappearing demographic. It is obvious that many new volunteers are needed. One solution is to tap into the vast resource of workplace volunteers.

The good news in the Statistics Canada report is that employer support for volunteerism has actually increased. Twenty per cent of employee volunteers received approval from their employers to modify their hours to volunteer in the community and 22 per cent received recognition from their companies for their volunteer work.

It is reasonable to suppose that a well-crafted employer-supported volunteer initiative is an opportunity to meet the challenges we currently face (shrinking volunteer commitments, volunteer burnout), creating a "win-win-win" situation with measurable benefits to companies, employees and communities.

*“By combining social action with good community relations and employee development, corporations provide solutions to social problems, strengthen the local economy, build goodwill toward their companies and achieve business goals.”*

Kristin Smith  
Volunteer Canada



## Preliminary Research

Any ESVI you create must have the buy-in and endorsement of senior management if it is to succeed. You need to build a solid case for support, just as you would any other business initiative, to show its value to your superiors.

There are a number of factors you need to consider. In this section we'll look at definitions and distinctions, options for company involvement, influencing variables and the benefits of an ESVI, all of which can help you build your case.

## Step 1: Definitions and Distinctions

### Volunteerism

Volunteering is an activity with many different faces. It is constantly being redefined. Here's how Volunteer Canada describes it:

*“Volunteering is the most fundamental act of citizenship and philanthropy in our society. It is offering time, energy and skills of one's own free will. It is an extension of being a good neighbor, transforming a collection of houses into a community, as people become involved in the improvement of their surroundings and choose to help others. By caring and contributing to change, volunteers decrease suffering and disparity, while they gain skills, self-esteem, and change their lives. People work to improve the lives of their neighbours and, in return, enhance their own.”*

Paddy Bowen  
Executive Director, Volunteer Canada

It is particularly important to understand the differences and similarities between volunteerism in the broadest sense and the workplace volunteerism models — employee volunteerism and corporate volunteerism — relevant to the planning of an ESVI.

The Calgary Workplace Volunteer Council (CWCV) defines volunteerism as:

*“...performing activities of one's own free will that provide service to the community without monetary reward. It is an expression of active participation in the life of a community.”*



## Workplace Volunteerism

Fundamentally, there are two types of volunteerism in the workplace: employee and corporate. CWVC has identified their similarities and differences, as follows:

EMPLOYEE VOLUNTEERISM	CORPORATE VOLUNTEERISM
<ul style="list-style-type: none"> <li>• Done on employees’ own time</li> </ul>	<ul style="list-style-type: none"> <li>• Happens during business hours</li> </ul>
<ul style="list-style-type: none"> <li>• Might be opportunity for employees to work together</li> <li>• Sometimes facilitated by the company, sometimes by the employee</li> </ul>	<ul style="list-style-type: none"> <li>• Might be opportunity for employees to work together</li> <li>• Generally facilitated by the company with clear objectives for the event/project</li> </ul>
<ul style="list-style-type: none"> <li>• Can be top-down or bottom-up; not on company time</li> </ul>	<ul style="list-style-type: none"> <li>• Can be top-down or bottom-up; is on company time</li> </ul>
<ul style="list-style-type: none"> <li>• Can be encouraged, promoted, recognized and/or enabled by the company</li> </ul>	<ul style="list-style-type: none"> <li>• Is encouraged, promoted, recognized and/or enabled by the company</li> </ul>

It is important to recognize the distinctions between “top-down” and “bottom-up.” Typically, employee volunteerism activities are “bottom-up,” managed by the employees with varying levels of support from management. In corporate volunteerism, activities are coordinated from the “top-down,” directed by management with expected employee participation.

### Step 2: Options: Levels of Involvement

There are a number of levels at which a company can choose to become involved in supporting employee volunteerism. Examining the characteristics and possibilities of each will help you identify where your company fits on the continuum and/or decide what level of activity may be the best fit. Keep in mind your employer-supported volunteer initiative can include any or all of the elements in each area of the continuum. Each is valid in its own right.



**Levels Of Involvement Continuum**

Levels Of Involvement Continuum			
● ←			→ ●
<b>Acknowledge Volunteerism</b>	<b>Encourage Volunteerism</b>	<b>Enable Volunteerism</b>	<b>Facilitate Volunteerism</b>
<p>minimal company involvement, few resources available</p> <p>volunteering done on employees own time</p> <p>approved use of bulletin boards for posting volunteer activities</p> <p>acknowledging employees who volunteer by considering relevant volunteer experience when hiring or evaluating performance</p> <p>does not actively promote employer-supported volunteerism internally, no formal policies in place</p>	<p>increased company involvement, more resources available</p> <p>still done on employees own time; company allows non-paid time off for community service, use of company resources (phones, faxes, copiers, off-hours meeting rooms)</p> <p>sponsors N'tl. Vol. Week activities; recognizes those who volunteer via newsletters, etc.</p> <p>is active in posting community volunteer opportunities</p> <p>encourages employee-driven giving programs, for example, annual United Way campaign</p> <p>has a payroll deduction system in place for employee donations</p>	<p>moderate level of involvement, more proactive company support</p> <p>no formal company-directed initiatives in place, allows employees to choose and direct</p> <p>recognition program in place</p> <p>CEO sends memos encouraging volunteerism, personal letters commending those who volunteer</p> <p>staff can adjust work schedules to accommodate volunteer commitments, earn time off with hours accrued</p> <p>direct appeals to staff to volunteer for specific activities for the non-profit/cause the company supports</p> <p>matching gifts and/or "Dollars for Doers" programs (see notes to follow)</p>	<p>deep level of corp. involvement, strategic investment</p> <p>initiated by company, but formal ESVI developed and managed by employees</p> <p>research done to determine employee preferences, community needs, alignment of ESVI with bus. objectives</p> <p>specific charity/cause selected: three-way partnerships</p> <p>ESVI structure formalized: named and branded; policies, mission and outcome statements in place</p> <p>specific project(s) created/selected</p> <p>resources allocated (financial, material, expertise)</p> <p>active recruitment, recognition, release time provided</p> <p>results tracked and evaluated</p>



### **Step 3: Where Are You Now?**

Now that you have a better idea of the levels at which a company can get involved, take a look at what your own company is currently doing. Is it engaged in any of the activities on the continuum? Is it currently involved in any charitable activities that benefit the community? Here are a few examples of what others are doing:

#### **Matching Gifts**

Matching gifts is a strategy where employee cash donations to a charitable organization trigger a matching financial gift from the company to the same organization. Matching gift programs encourage employees to:

- increase their personal donations through the incentive of a corporate match;
- increase the impact of a company's contribution when employees support company-backed causes or organizations; and
- extend support to employee-favoured charities (often smaller organizations) that would not normally receive donations from the company.

A common restriction applied to matching gifts is that the recipient organization cannot be political, religious or controversial.

#### **Dollars for Doers**

When an employee performs volunteer work for a charitable organization, the work triggers a specific cash donation from the company to the organization. It is a means of encouraging and rewarding the employee for getting involved with the community outside of work hours. Many companies have adopted the approach of linking employee volunteer and donation initiatives because it leverages the power of each.

Criteria are defined and communicated to employees including the number of volunteer hours or months needed to receive a company cash donation. Often, the employee has to have been on the job for a certain length of time before being eligible to apply. Common restrictions are the same as the criteria for matching gifts.

#### **Employee Giving Programs**

Employee giving programs are most often associated with United Way campaigns. Giving to the United Way and other federated appeals has won broad support in firms across Canada and is accepted by employees and the public as an appropriate vehicle for corporate involvement in the community. Companies aligned with annual campaigns of this nature usually incorporate a system for payroll deductions, to facilitate employee



donations. Employees are encouraged to run their own fundraising events to increase donations to the overall campaign. Activities often become quite competitive, in a friendly fashion, as those involved try to outdo each other in an effort to see who can raise the most money for the campaign.

### **Annual Fundraising Campaign for a Particular Charity or Cause**

The company encourages employees to organize and run an annual fundraising campaign for a pre-selected charitable organization or cause; for example, an annual food drive to help the local food bank and soup kitchens in their cause to end hunger. Raising funds for a specific agency that makes wishes come true for children with life-threatening or terminal illnesses is another example.

Fundraising activities such as raffles, bake sales, head shaving contests, and pub nights offer creative approaches to helping the community and are often built into regular activities such as company picnics and outings, company sports teams, and other recreational or healthy lifestyle promotion programs.

These activities often build team spirit and morale as employee groups work together toward the common goal of improving life in their communities.

### **Annual One-Day Helping Event**

In conjunction with a selected nonprofit organization, the company provides personnel and materials for a particular event; for example, to paint a senior citizen's home or to do springtime clean up of a holiday camp for underprivileged children.

### **Corporate Donations Committee**

A committee with an annual budget is set up by the company to handle the donation of cash, goods or services to charitable organizations that fit within the company's donations criteria.

### **Donated Expertise**

The company provides professional assistance through the donation of employee expertise, during work time. For example, a computer specialist spends time teaching volunteers at a nonprofit agency how to use certain software programs. Another example is a member of the company taking a position on the board or working committee of a charitable organization.

Write a short summary of where your company is now and jot down some ideas of where you think it could go (the beginnings of your ESVI goals).



## Step 4: Influencing Factors: Variables to Consider

Understanding what your company is already doing paves the way for increased involvement through employer-supported volunteer initiatives. Before you can make recommendations you need to look at a variety of factors that will influence your decision making.

As you build your case for senior management support, consider the following variables:

### 1) Company

**Workforce demographics** – The composition of a company's work force and their preferred interests in community issues will make each employer-supported volunteer initiative unique.

**Industry type** – A company's business and the importance of various stakeholder groups will dictate to some extent the charitable causes and volunteer efforts it supports.

**Corporate culture** – The kind of culture a corporation has will dramatically affect an ESVI. For example, if the workplace is relatively casual and has a tradition of flex time, the program can be designed to take advantage of this.

**Company values** – A company that values community involvement and corporate social responsibility may be more willing to support an ESVI.

**Senior management goals/corporate priorities** – Business managers who openly acknowledge that the company can play a part in the welfare of the community are more likely to be supportive of an ESVI.

**Union/non-union environment** – Typically, union environments have more issues with release time. This may impact an ESVI.

**Configuration of the business** – When designing an ESVI, a company with a head office and branches will need to consider what is important to the employees of each branch office and related community.

**Ethical and political issues** – How well a business understands the ethical and political factors associated with its business will affect general support for an ESVI. Companies whose leadership acknowledges the ethical responsibility to ensure a sustainable business development model (that is, addressing social needs as well as economic and environmental issues) are more likely to be supportive of an ESVI.

### 2) Employees As Volunteers

Thinking ahead about the next set of variables can help ensure activities are accessible to the widest range of employees. Ask yourself the following questions about volunteer activities:



**Frequency** – How often will the employee be volunteering for the activity; once a year, monthly, weekly, daily?

**Duration** – How long will the employee be encouraged to commit to the volunteer role — a one-day commitment at a special event, or a two-year commitment to a long-term project?

**Time** – Will activities take place on company time or personal time?

**Human resources** – How many volunteers are needed to complete the work?

**Activity** – What kind of activities will the employees be doing?

**Skill** – What skills are needed to accomplish the task?

**Location** – Where will the volunteer activities take place?

### **Benefits: A Win-Win-Win Situation**

An employer-supported volunteer initiative is a valuable asset that can be leveraged and focused to support a company's broader strategic vision. When run effectively, the initiative can be characterized as "win-win-win" because everyone benefits — the company, its employees, and the community at large.

### **What The Data Shows**

Because Canadians hold social responsibility as a high priority, they tend to be attracted to companies — as employees or consumers — that are socially responsible. Consumer research shows the importance of a company demonstrating its connection with community through such initiatives as employee volunteerism.

A recent Environics Millennium Poll showed that 89 per cent of Canadians want companies to go beyond their historical role of making a profit, paying taxes, employing people and obeying all laws. Canadians expect companies to contribute to broader societal goals. Boycott behaviour is linked to these expectations.

A 1997 survey by the Canadian Council of Chief Executives (formerly the Business Council on National Issues) supports the case for an ESVI. The CEOs of Council members surveyed cited human resource management — recruiting, retaining, boosting loyalty and morale, and improving motivation and productivity — as the principal company benefit of employer-supported volunteerism initiatives.



## **Additional Benefits to Companies**

Employer-supported volunteer initiatives can:

- enhance reputation and improve corporate public image;
- improve stakeholder relationships;
- build good will in the community, to be drawn upon in times of crisis;
- leverage impact of monetary donations;
- help to achieve business goals; and
- help to establish networks into the community

A 1998 National Survey conducted by IMAGINE reveals the benefits to employee volunteers:

- 75 per cent say that volunteering has enhanced their interpersonal skills;
- 66 per cent say their communication abilities have improved;
- 50 per cent say they have strengthened their organizational and management/leadership capacities; and
- 34 per cent of volunteers say they have gained new skills that directly apply to their paid jobs.

## **Additional Benefits to Employees**

As well as the tangible benefits of strengthened workplace skills, ESVIs can generate important intangible benefits:

- improved morale, as employees feel good about working for a company that supports volunteerism in the community;
- the sense of satisfaction employees gain from a volunteer experience that carries over to work and home life;
- the knowledge they are making a meaningful contribution to society; and
- an increased connection to community.

## **ESVI Benefits to Community**

Charitable organizations reap many benefits:

- additional “people power” to deliver services, increasing the ability to meet community needs;
- new skills learned from employee volunteers (management or technical, for example);
- team building, leadership development;
- increased opportunities for financial support;
- raising the profile of the organization in the business community; and
- increasing awareness of the cause or issue.



## The Bottom Line

Since stakeholders are looking for concrete displays of a company's commitment and participation in the community, an ESVI is a direct means of demonstrating the company is actively engaged in community-enhancing activities through the involvement of employee volunteers.

## Taking Your Case to Senior Management

You should now have enough information to decide what level of ESVI you want to pursue. Along with the research you have conducted and the variables you have considered, you have a strong business case to bring forward to senior management your rationale for an ESVI. Put together a short document of what you have learned and state in very simple terms the “why, what, how and who” of an employer-supported volunteer initiative, including:

- why the company should create an employer-supported volunteer initiative;
- how the variables you have considered will affect the creation of an ESVI;
- what type of ESVI may be the best fit and why; and
- who should develop and manage the initiative (employees or company) and why.

What you need in return is senior management's endorsement to pursue the next level of research to answer these important questions:

- Who are your key stakeholders?
- What do they want?
- How high is their interest in developing an ESVI?

Answers to these questions will give you the information necessary to make recommendations and gain final approval from senior management to develop and implement a plan for the ESVI.

*“Giving back to the community through volunteering has become a very important part of my life. I believe we all have a responsibility to do what we can to make this a better place to live, and by giving a little bit of ourselves, we can make a significant difference in the lives of others. And, of course, seeing the results of your time and energy makes it all worthwhile. I also feel pretty lucky to have an employer who supports me in my volunteer activities.”*

Lorraine J. Trott  
Communications Manager, Western Canada  
IBM Canada

## Phase Two: Research and Analysis



Now that you have sold senior management on the benefits of an ESVI, you can move on to the deeper research.

To make strategic decisions about what constitutes a successful ESVI, you need to identify and prioritize your stakeholders, and understand their issues, vested interests, wants and needs.

This will entail:

- asking the right questions;
- creating and distributing surveys;
- holding informal chat sessions or focus groups with stakeholders;
- tabulating results; and
- using the results to create company and employee profiles.

### **Step 1: Identify Key Stakeholders**

A stakeholder can be defined as any individual or any group that can affect or is affected by the activities of an organization. If you refer to your company's organizational or business plan, you will likely find that stakeholders are identified.

Relative to the business community, stakeholders of an ESVI are generally divided into three groups: company, employee and community.



For our purposes, we will sort stakeholders into two categories:

**Internal:** Employees, Company

**External:** Community

The following chart is an overview of stakeholders. At this stage, however, our focus will be on internal stakeholders and their needs. We will move on to community stakeholders once we enter into the development process (Phase Three).

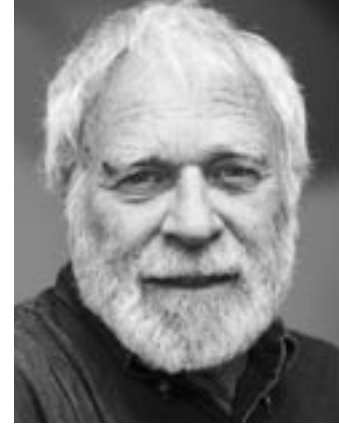
<b>Stakeholders</b>		
<b>Internal</b>		<b>External</b>
<b>Company</b>	<b>Employee</b>	<b>Community</b>
Shareholders/Investors Board members CEO, COO, CFO, etc. Senior managers Department managers Branch managers Plant managers Partners Suppliers	Trade unions Social clubs Employee groups Professional associations Department staff Branch staff Plant staff Franchise owners and staff Retirees Current volunteers	Nonprofit organizations Community associations Consumers/Customers Neighbours Politicians Legislators/Regulators Foundations Religious groups Political groups Educational institutions Advocacy groups Media



## Step 2: Internal Stakeholder Issues

Each relevant stakeholder — individual or group — has specific issues that need to be addressed to ensure engagement in and support of your ESVI. Examples of company and employee concerns regarding the initiative are as follows:

<b>Internal</b>
<b>Company: Issues, Interests, Expectations</b>
<ul style="list-style-type: none"><li>• What level of involvement should we pursue?</li><li>• Should we support a specific charitable organization or a community issue?</li><li>• Who will manage the ESVI — company or employees?</li><li>• Can the employees do their jobs and volunteer at the same time?</li><li>• Will volunteer activities be well attended?</li><li>• Will employees' volunteer work cost the company anything?</li><li>• What specific company resources will we need to commit?</li><li>• What benefits can we expect from employee involvement?</li><li>• Do ESVI goals align with company values and business objectives?</li><li>• How can we leverage company support of an ESVI?</li><li>• Will a partnership with a community organization be of benefit to all?</li><li>• Will the community be healthier as a result?</li><li>• Will results be measurable?</li><li>• Can the ESVI be evaluated for cost, benefits and outcomes?</li><li>• Will the company see a positive bottom-line return?</li></ul>



<b>Internal</b>
<b>Employees: Interests, Issues, Expectations</b>
<ul style="list-style-type: none"><li>• Do I want to volunteer on my own or through a company initiative?</li><li>• How will the company support my volunteer efforts?</li><li>• Will management participate?</li><li>• Will I do this on my own time or will there be flex time?</li><li>• How will the company decide which cause or group to support? Will I have a choice or a vote?</li><li>• How much time will I be putting in?</li><li>• How often?</li><li>• What kinds of activities will I take part in?</li><li>• Can I do this with my family? Friends?</li><li>• Is there an opportunity to work with colleagues outside my own work group?</li><li>• Am I making new connections and expanding my network?</li><li>• Am I learning new skills that will help me get ahead at work?</li><li>• Am I improving the skills that I have?</li><li>• Will I have fun?</li><li>• Am I doing something meaningful, making a difference?</li><li>• Is a need in the community being met?</li><li>• Will the community be healthier as a result?</li><li>• Will the company recognize my volunteer efforts?</li></ul>

### **Step 3: Needs Assessment: Internal Information Gathering**

Now it's time to gather information from your internal stakeholders to determine their level of interest in an ESVI.



This can be accomplished through a series of surveys, interviews, and focus groups and by tapping into existing research. Using these research methods will give you the opportunity to explore stakeholder relationships, perceptions and needs within the company. The feedback will give you additional insight into what level and type of ESVI may be appropriate.

Let's look at the bases that need to be covered with internal stakeholders and how to go about it.

### **Employees**

What you need to know:

- What community needs and social issues are important to employees?
- Why do employees volunteer?
- Are employees who currently volunteer interested in participating in a company ESVI?
- Are employees not already volunteering interested in doing so?
- How would employees prefer to be engaged in the community (frequency, duration, task)?
- When do they prefer to volunteer (day, evening, weekend)?
- With whom do they want to volunteer (fellow employees, family members, other)?
- Which of their skills do they think would be valuable to an ESVI?
- What additional skills would they like to learn/acquire through an ESVI?
- What are the awareness and perception levels of employees regarding community problems, needs, and issues?
- Where would employees prefer to volunteer (home, work, office, on line, on site at the nonprofit, work directly with clients)?
- What types of nonprofit organization, group or cause are they interested in supporting?
- What is their vision of an ideal employer-supported volunteer initiative?

*Information gathered from research sets the stage for defining the corporate role and the parameters for the employer-supported volunteer initiative.*

### **How to get the information**

Choose one or more of the following:

- Use common communication channels to set up some casual “fireside chats” with employee groups. For example, hold a workplace lunch session and provide the food. At the event, explain why you think an ESVI is important and why their input is needed and seek out questions and suggestions.



- Target the opinion leaders in the company and conduct a focus group in an environment where participants are free to brainstorm ideas and scenarios for the ESVI.
- Develop a survey based on your formative questions and distribute to all employees via interoffice mail, employee website/Intranet or in the company's print newsletter. Here are some useful tips on surveys:

### **Preparation for an Employee Survey**

- Include a cover letter from your CEO/President that:
  - explains the concept of employer-supported volunteerism;
  - explains the survey is to determine employee interest in an ESVI;
  - acknowledges and praises current employee volunteerism in the community; and
  - makes clear the survey is voluntary and confidential.
- Be familiar with legislation related to the protection of private information.
- Determine how you will use the survey data.
- Ask only what you need to know.
- Pre-test the survey to make sure it is clear.
- Ensure all employees receive the survey and are encouraged to participate.
- Use a simple “check box” format and leave room at the end for additional comments.
- Have clear categories on the survey so it is easy to complete (For example, when seeking information on volunteer interest areas, provide a list that employees can check off such as health, poverty, arts, youth, seniors, homelessness, and so on). Include room for “other” whenever possible.
- An important question to include is whether they would be interested in joining a team to develop the plan for the ESVI (you will need to form a team or committee if the ESVI development goes forward).
- Develop a database to be used to input the results of the survey. Make sure to use the same categories for both the database and the survey to simplify the process.
- Follow up to ensure a good rate of return of completed surveys. Consider offering an early bird prize or other incentive.
- Communicate the results of the survey in a timely manner.



As an example, here is what Petro-Canada developed for its employee survey.

<b>Petro-Canada's Employee Volunteer Survey</b>																																									
<p>1. Have you volunteered for not-for-profit community service/program in the past 12 months? <span style="float: right;"><input type="checkbox"/> Yes   <input type="checkbox"/> No</span></p> <p>What kind of volunteering did you do (e.g., coaching, board or committee work, counseling, etc.)?</p> <p>_____</p> <p>On average how many hours do you volunteer per month? _____</p>																																									
<p>2. If you volunteer, do you volunteer as...? (check all that apply)</p> <p><input type="checkbox"/> An individual   <input type="checkbox"/> A family   <input type="checkbox"/> Part of a group/team   <input type="checkbox"/> Other (specify)</p>																																									
<p>3. To what extent do you agree or disagree with each of the following statements. ONE means strongly disagree and FIVE means strongly agree.</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;"></th> <th style="text-align: center; width: 10%;">Disagree strongly</th> <th style="width: 10%;"></th> <th style="width: 10%;"></th> <th style="width: 10%;"></th> <th style="text-align: center; width: 10%;">Agree Strongly</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;">a. Making donations of money or time, to charitable agencies is important to me.</td> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">3</td> <td style="text-align: center;">4</td> <td style="text-align: center;">5</td> </tr> <tr> <td style="padding: 5px;">b. I get a lot of satisfaction from helping others</td> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">3</td> <td style="text-align: center;">4</td> <td style="text-align: center;">5</td> </tr> <tr> <td style="padding: 5px;">c. If I had more spare time, I would volunteer more often</td> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">3</td> <td style="text-align: center;">4</td> <td style="text-align: center;">5</td> </tr> <tr> <td style="padding: 5px;">d. I think Petro-Canada should support employee/retiree volunteer activities</td> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">3</td> <td style="text-align: center;">4</td> <td style="text-align: center;">5</td> </tr> <tr> <td style="padding: 5px;">e. I would be interested in volunteering for a program supported by Petro-Canada</td> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">3</td> <td style="text-align: center;">4</td> <td style="text-align: center;">5</td> </tr> </tbody> </table>							Disagree strongly				Agree Strongly	a. Making donations of money or time, to charitable agencies is important to me.	1	2	3	4	5	b. I get a lot of satisfaction from helping others	1	2	3	4	5	c. If I had more spare time, I would volunteer more often	1	2	3	4	5	d. I think Petro-Canada should support employee/retiree volunteer activities	1	2	3	4	5	e. I would be interested in volunteering for a program supported by Petro-Canada	1	2	3	4	5
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e. I would be interested in volunteering for a program supported by Petro-Canada	1	2	3	4	5																																				
<p>4. Volunteers are people who share their time and abilities with others. Which of the following abilities could you bring to a potential volunteer activity? Check all that apply.</p>																																									



- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Financial           | <input type="checkbox"/> Painting/drawing                | <input type="checkbox"/> Negotiating         |
| <input type="checkbox"/> Analyzing           | <input type="checkbox"/> Innovating                      | <input type="checkbox"/> Operating equipment |
| <input type="checkbox"/> Driving             | <input type="checkbox"/> Writing and/or<br>Communicating | <input type="checkbox"/> Managing meetings   |
| <input type="checkbox"/> Entertaining        | <input type="checkbox"/> Organizing                      | <input type="checkbox"/> Working with hands  |
| <input type="checkbox"/> Caring for children | <input type="checkbox"/> Repairing                       | <input type="checkbox"/> Writing             |
| <input type="checkbox"/> Coaching            | <input type="checkbox"/> Leading and/or<br>Supervising   | <input type="checkbox"/> Researching         |
| <input type="checkbox"/> Health care         | <input type="checkbox"/> Planning                        | <input type="checkbox"/> Sports              |
| <input type="checkbox"/> Mentoring           | <input type="checkbox"/> Teaching                        | <input type="checkbox"/> Building            |
| <input type="checkbox"/> Coordinating        | <input type="checkbox"/> Public speaking                 | <input type="checkbox"/> Cooking             |
| <input type="checkbox"/> Counseling          |  | <input type="checkbox"/> Other (specify)     |
| <input type="checkbox"/> Keeping records     |  | _____  |

5. Thinking of yourself as a volunteer, in which of the following areas would you be most likely to volunteer?

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Children and Youth              | <input type="checkbox"/> Arts and Culture                   | <input type="checkbox"/> Education                   |
| <input type="checkbox"/> Festivals and Special<br>Events | <input type="checkbox"/> Seniors                            | <input type="checkbox"/> Museums/Historical<br>Parks |
| <input type="checkbox"/> Crime Prevention                | <input type="checkbox"/> Counseling and Support<br>Services | <input type="checkbox"/> Health Care                 |
| <input type="checkbox"/> Community Services              | <input type="checkbox"/> Environment                        | <input type="checkbox"/> Other (Please specify)      |
| <input type="checkbox"/> Recreation and Sports           | <input type="checkbox"/> Persons with Disabilities          |  |

6. When would you be most likely to volunteer your time?

- Week Days       Week day evenings       Week ends       Holidays

7. Would you be interested in being made aware of any volunteer opportunities that arise which may match your skills and interests?  Yes     No

Name \_\_\_\_\_

Work Location \_\_\_\_\_

Phone Number \_\_\_\_\_

Email \_\_\_\_\_



## **Create an employee profile**

Use the information you gather from focus groups, dialogues and/or an employee survey to create an employee profile, a very efficient way of summarizing your findings for later use.

You could organize the data in the following manner:

- Employee demographics (department, job description, skill sets)
- Number of hours employees presently volunteer per month
- Community issues supported by employee volunteers
- Reasons for volunteering
- Beliefs and values associated with volunteering
- Awareness of issues and challenges
- Issues employees see as most important
- Willingness to participate as an ESVI committee member
- Employee preferences in:
  - how they want to volunteer: individually or as groups, frequency, for short or long term commitments
  - the role they take — direct service or in a leadership capacity
  - where and when they want to volunteer
  - organizations they want to support/continue to support

## **Company**

### **Create a company profile**

A company profile is a clear statement of what the company and its employees are trying to achieve in the community through an employer-supported volunteer initiative. It ensures that internal and external stakeholders will hear a consistent message about the value the ESVI has to employees, the company and the community.



When creating a company profile, include the following elements:

Company's past and present

- Corporate vision, mission, and values
- The company's past giving history, areas or projects
- Policies, if any, addressing community involvement
- Current levels of volunteer activity, if any

Corporate demographics

- Fully address the company's priorities, level of union involvement, scope of operations in both geography and time, and scale of operations.

Employee demographics

- Statistics on employees by office, zone, region, or operating area
- Your newly created employee profile

The following page contains a sample company profile form created by the Calgary Workplace Volunteer Council, which can act as a guide.



## Company Profile

Mission of the company and related values statements:

Forecasted earnings \_\_\_\_\_ profit \_\_\_\_\_ loss

Policies on community investment  yes  no (If yes, copy and attach)

## Company History

Past giving areas	Priority of giving areas	Current programs involving volunteers?	Approximate number of volunteers involved and kind of support from the company

## Company Demographics

Geographic location of facilities	Number of employees	Unionized? Non-union?	Age range	% male % female	% white collar % blue collar	Hours of operation – shift, flex, seasonal, etc.

## Key Decision Makers – formal and informal

President/CEO:	Personnel or Human Resources Manager:
Community Investment/ Community Relations Manager:	Employee Chairperson:
Other:	Other:



## **Analysis of Findings and Recommendations**

Now that you have gathered all the necessary information, it's time to analyze your findings. Your research will show quite clearly the level of interest employees have in pursuing an employer-supported volunteer initiative. You will also have a fairly clear picture of the shape and form of ESVI to pursue.

Before you make your final recommendations to senior management as to whether to proceed to develop a strategic plan for the ESVI, barriers to success and alignment with company values and goals need to be addressed.

### **Step 4: Possible Barriers to Success**

Your research may reveal a number of environmental and cultural barriers. Here are some examples of what you might be up against:

1. Employees may already be volunteering and do not have time for company initiatives.
2. Some employees feel that volunteering is a private activity that is inappropriate for workplace involvement.
3. Some companies have policies against non-business activities during work hours.

You will need a clear and concise response to address these and other issues that may have arisen. Here are possible solutions to the above examples:

1. Build an ESVI that supports employees in their current volunteer commitments or by supporting the same causes, if they align with company goals.
2. Direct your ESVI initially toward those employees who would like the company to get involved.
3. See if restrictive policies can be softened and if not, structure your ESVI so volunteer activities occur after working hours.

Keep in mind that for every barrier to success there is usually a solution, one that can be found through a combination of access to information (which you have) and common sense.



## Step 5: Alignment with the Company

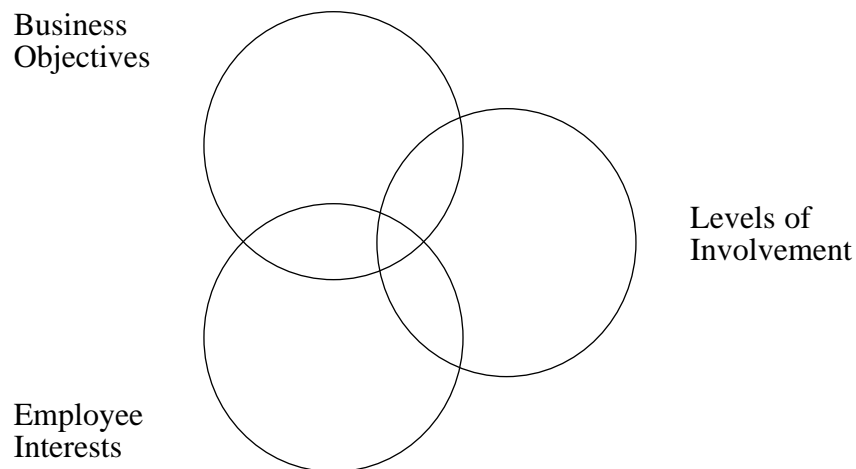
Your research has most likely identified the issues/causes that employees would support through an ESVI. It is very important now to make sure your ESVI scenario is in alignment with company values and corporate objectives.

There are a number of ways to ensure your proposed scenario is in alignment:

1. Confirm a connection to the corporate vision, mission, and values. If the company has a social vision or a values-based mission, common threads can likely be found with many community needs.
2. Describe how employee interests and their desired level of involvement is in alignment with company values and goals.
3. Describe how the ESVI fits in and is consistent with the company's other corporate social responsibility efforts.
4. Identify key business objectives and harmonize with corporate, and employee interests.

## Step 6: Recommendations

In essence, you are selecting the business objective(s) an ESVI could support and recommending a level of involvement that intersects company goals with employee interests to the benefit of the community.





To review, your recommendations could incorporate any of the following:

<b>Business Objectives:</b>
<ul style="list-style-type: none"><li>- Strengthen stakeholder relationships</li><li>- Improve public image</li><li>- Build goodwill in the community</li><li>- Enhance employee skills</li><li>- Boost morale, motivation, productivity and loyalty</li><li>- Improve retention, attract new employees</li><li>- Open new markets</li><li>- Generate positive economic benefits</li><li>- Build healthier communities</li></ul>

<b>Employee Interests:</b>
<ul style="list-style-type: none"><li>- Making a difference, meeting a need</li><li>- Increased connection to community</li><li>- Family involvement</li><li>- Enhance existing skills, learn new ones</li><li>- Personal and professional development</li><li>- Gain leadership experience</li><li>- Preferred causes/issues, charities, activities</li><li>- Variety of activities and experiences</li><li>- Preferences in terms of time, frequency, duration</li><li>- Company pride</li></ul>



### Levels of Involvement:

- Annual one-day event for charity of choice
- Dollars for Doers
- Grants
- Flex time
- United Way fundraising
- Payroll deductions
- Donations committee
- Resource support: people, materials, time, funds
- Loaned expertise
- Acknowledge and support employees' personal volunteer efforts
- Fully supported strategic ESVI with clear goals and outcome expectations

*“I’m a firm believer that everyone has some time to give back the community. I have been involved in the SPCA program for the past four years and, thanks to the support of both my co-workers and customers, I have had wonderful success in organizing the adoption of many unwanted and unloved companions to people.”*

Sherry Swales  
Surrey Metro Savings (Surrey)



## **Step 7: Discussion and Decision Making**

Now that you have all the pieces to the puzzle, it's time to have a full and frank discussion with the members of the senior management team who have supported your efforts thus far. You have reached the "go, don't go" stage. The interest levels of employees dictate whether you recommend the development of a strategic ESVI or whether simply to set up policies and guidelines to facilitate current volunteerism levels and/or recommend adding some new activities selected from various points in the Continuum (page 15). Present your rationale and back up your reasons for your choices with your research.

No matter what level of involvement senior management chooses to support, basic planning, structure and policies are now required. While the remainder of this document is geared toward the development of a formal, strategic ESVI with a deep level of stakeholder commitment, the steps to follow can be applied, in varying degrees, to whatever level the company has endorsed.

It's time to move on to the next phases: Building the Plan and Making It Work

## Phase Three: Building the Plan



### Overview

Outlined in this section are the components of your ESVI plan. We'll describe each element involved and give you examples along the way of what other companies have done.

*“[An ESVI] should have a full business plan that includes a vision, mission, objectives, goals, tactics, measurement and evaluation. It should address recruitment, retention, recognition, growth, business conditions, employee interests...just to name a few.”*

Ashley Desmarteau  
Director, Community Relations  
Intel Corporation

Here are the steps to take in building your plan:

1. Define the structure and how to organize.
2. Articulate scope and goals.
3. Define guidelines and policies.
4. Develop a mission/purpose statement.
5. Name the ESVI.
6. Community consultation, selection and project(s) creation.
7. Identify resources and budgeting and staffing requirements.
8. Get the green light.

Let's look at these steps in some detail.



## Step 1: Structure and Organization: Building the ESVI Team

Assuming employee interest in employer-supported volunteerism is high and senior management has approved the development of a strategic ESVI, it's time to set up a task force or volunteer committee. At the very least, one individual should be assigned to develop and manage the ESVI, be it a seconded employee or an outside consultant. In the case of a strategic ESVI, the team structure is best.

Until now, most of the work you have done is best described as “top-down.” You have approached your research from the company's point of view. “Bottom up” was added to the mix when you began to gather and analyze information from employees.

From this point forward, the process becomes predominately “bottom up.” Remember that if your ESVI is to succeed it must be owned and driven by employees.

### Guidelines for Setting Up Your ESVI Volunteer Committee

Members of the ESVI team will become leaders and champions in their areas of responsibility and throughout the company. Review the list of employees from your research who expressed an interest in helping to develop the ESVI. Also target the “opinion leaders” who participated in focus groups and chat sessions.

When selecting your committee from this group, consider the following criteria:

**Volunteer history:** Is the employee known for participating in company or community-sponsored volunteer events and activities?

**Experience:** Does the employee have experience in helping plan and coordinate events?

**Skills/Talents:** Does the employee have the necessary skills or talents to make a meaningful contribution to the committee?

**Ability to participate:** Does the employee have the time/ability to work on the committee given current obligations and commitments in and outside the workplace?

**Job performance:** Is the employee in good standing with the company and will he or she be able to continue to maintain a satisfactory job performance while serving on the committee?

**Willingness:** Does the employee demonstrate a genuine interest in working on the committee?

**Senior advisor:** Is a member of senior management available to act in an advisory capacity on the committee?



If your company is large enough, include representation from several departments, organizational levels and volunteer experience levels.

Organizing strategies provide a foundation and direction for your ESVI. The main thrust is to establish how the ESVI will be governed and managed. Defining the duties and responsibilities of team members and how the team will interface with stakeholders is part of this process and should be articulated in ESVI policies and guidelines (to follow).

## **Step 2: Scope and Goals**

As the first order of business, the ESVI team needs to review a summary of the research, analyses and recommendations — a thumbnail sketch of the work you have done to date — and be thoroughly familiar with the data.

Articulate the scope of the ESVI. Is it, for example:

- a commitment to one particular nonprofit organization?
- adopting a cause/issue (such as homelessness or literacy) and working with a number of charitable organizations?
- one event undertaken as a pilot project?
- several special events throughout the year?
- top-down, bottom-up or a combination of the two?

*“[An ESVI] is one that is embraced by senior management, is employee driven, and guided by a mission, purpose and guidelines. It is also supported with dedicated resources (staff and budget), conducts on-going activities and tracks participation and results through measurement and evaluation.”*

Lewis Karabatsos  
Senior Manager  
Corporate Community Relations  
Compaq Computer Corporation



Regardless of the scope of the initiative, annual goals and objectives need to be established. Goals are based on stakeholder expectations.

- What outcome has senior management deemed important?
- Where do employee interests lie?
- What need in the community could we meet?

Determine what factors would mean success: for example, the percentage of employees involved, number of hours, number of activities, number of nonprofit organizations helped, number of clients served, and quantifiable company support in place.

Determine what kind of impact is a reasonable expectation for any one issue or any one organization.

### **Step 3: Guidelines and Policies**

Policies are the equivalent of bylaws. They provide the parameters of how the ESVI will be governed, set up and delivered. It is important that these guidelines look like existing company policies and be respected equally.

Governance policies should include:

**Roles and duties of committee members:** Define the responsibilities of the members of the ESVI committee (Chair, Vice-Chair, Secretary, Treasurer, Project Manager, Communications Officer, Volunteer Coordinator, and so on.)

**Committee parameters:** For what length of time does a member serve on the committee? How are retiring committee members replaced? What if a member isn't performing their duties? How often will meetings be held? Where and when will they be held?

**Relationship of the ESVI to the company:** For example, rules for use of company identity; authority to speak on behalf of company; communication and reporting methods, and so on.



As an example, here are excerpts from TransAlta's TACT (TransAlta Community Transformers) group bylaws.

<b>Article 3</b>
<b>3.0 Membership</b> Any current employee of TransAlta Corporation is eligible for membership on TACT. Each member present at any regular or special meeting is entitled to one vote on matters brought before the meeting. There shall be no dues. A maximum of 15 members will be retained with a minimum of one additional non-voting corporate representative.
<b>3.1 Deemed Withdrawal</b> Members who are absent from three consecutive meetings may be deemed to have withdrawn their membership and will be notified of such by the Committee Chairperson. Special circumstances can be taken into consideration, e.g. medical, family, etc. Decision to be made by a majority vote of the committee.
<b>Article 4</b>
<b>Separate Identity</b> TACT is not an official body of TransAlta and, without permission, has no authority to use its logotype or to speak on its behalf on any issue. The acts, defaults, torts, and contracts of TACT, its officers and agents shall in no way constitute a liability on behalf of TransAlta.
<b>Article 6</b>
<b>Organization</b> <b>6.1 Effort and Intent</b> TACT shall be a joint effort of its members and TransAlta Corporation. It is the intent that the leadership and effort shall be the responsibility of the members of TACT.



## **6.2 Leadership Team**

The Leadership Team shall consist of a Chairperson, Vice Chairperson, Past Chairperson, Project Coordinator, Volunteer Coordinator, Communication Coordinator, Secretary, Treasurer, Applications Coordinator, Selection Committee Coordinator and up to five (5) additional Director positions. The Leadership Team shall also include at least one person designated by TransAlta.

## **6.3 Member Election**

Members of the TACT, other than the TransAlta designee, shall be elected at an annual meeting. A replacement may be appointed by a majority vote of the Leadership Team for any unfilled position.

## **6.4 Term of Office**

The term of office for TACT shall be two years, and individuals may serve two consecutive terms.

## **6.5 Responsibilities**

TACT shall be responsible for program objectives, mission, budget planning, policy, special projects, recommending funding levels, overall evaluation, proposed changes to the Bylaws, and filling the vacancies of elected leaders.

## **Article 8**

### **Finances**

The Treasurer, Chairperson and Past Chairperson shall develop the financial requirements of a proposed budget for presentation to the Leadership Team. Signing authority shall be the Chairperson and Treasurer.

## **Article 9**

### **Rules**

Robert's Rules of Order shall govern at all TACT proceedings where they do not conflict with the Bylaws.



Terms of reference for the actions of the ESVI also need to be articulated, such as:

**ESVI participation:** Is it open to all employees? Do new employees have equal opportunities to get involved? Must they have worked for the company for a certain length of time before being eligible to sit on the committee?

**ESVI coordinator:** Does the level of ESVI require a full-time coordinator? If so, is your company willing to second an employee, hire someone internally, or hire an external consultant to manage the initiative? What should this position be paid? What are the terms of reference?

**Release time/flex time:** Is your company willing to give employees a reasonable amount paid time off to support community causes? What amount of time off is considered reasonable?

**Loaned personnel:** Is your company willing to loan an employee or executive to a community organization? If yes, for how long?

**Use of company facilities/equipment:** Will your company allow the use of the company space for meetings, phone banks and other activities? During the workday or after hours and/or weekends? Will your company allow employees to use office equipment to carry out volunteer activities? Will your company allow nonprofit organizations to set up displays, fundraising events or recruitment drives in company space?

**Personnel records:** Will the volunteer activities of employees be included in their personnel file?

**Liability and risk management:** Will the company accept liability for employees who are working with nonprofits as part of a company initiative; for example, for breaches of confidentiality, or conflicts of interest, insurance claims, and so on? It is important to recognize, understand and control liability risk in the same manner as any other business initiative.

*“As an organization, the Royal Bank possesses a keen sense of community responsibility. As an employee of RBC, I believe this corporate value has heightened my own awareness of volunteerism and what it means to ‘give back.’ More than being just a financial supporter of many causes, Royal Bank promotes and supports the hands-on involvement of its employees in community initiatives. From restructuring work arrangements to giving time off to employees who want to undertake such endeavours, RBC truly puts its money where its mouth is when it comes to community involvement.”*

Dax Nobrega  
Royal Bank (Calgary)



Obviously, a range of company stakeholders will need to be involved in creating and/or approving the policy statements, including:

- Senior management
- Human Resources
- Marketing and Communications
- Legal
- Risk Managers

Steps 4 through 7 to follow can be added to the policy statements upon completion.

#### **Step 4: Mission Statement**

The mission statement delivers a key message as to the purpose and vision of the ESVI. It serves as a guide to all that your ESVI seeks to achieve. It should be succinct and powerful. If possible, align it with company goals and values.

There are many different approaches, as you will see in the following examples from Canadian companies implementing ESVIs:

##### **TELUS:**

The mission of the new TELUS Community Connections program is clear and simple: We connect communities with our network of time, talent and financial support.

##### **TransAlta:**

TACT (TransAlta Community Transformers) will try to have a positive influence on the quality of life in our communities. As a committee making donations in the Wabamun Lake area, we want to:

- Have a positive impact in our communities, and
- Enhance the lives of the general public.

##### **Suncor Energy Inc:**

Suncor is committed to maintaining and improving the quality of life in society, particularly in communities where its employees work and live. This commitment includes investing in communities, encouraging employee volunteerism and building mutually beneficial relationships with stakeholders.



### **Canada Safeway: Because We Care**

**Objective:** Harmonize all Safeway giving under one banner to enhance our community reputation

**Focus:** Community and family health issues

**Vehicles:** Store-based donations, corporate sponsorship and programs, Safeway Charity Challenge

The mission statement will be used in all ESVI communication vehicles and materials. Give it considerable thought and get as much feedback as possible before making your final decision.

### **Step 5: Name the Initiative**

Give careful thought to the name you will select for your ESVI. While the name should indicate company origins, it should also have stand-alone identity that will help raise awareness and build visibility for the initiative.

Specific considerations are:

- The name must be creative, upbeat, and unique.
- The name must be short, easy to remember and quick to say.
- Acronyms are popular but make sure the acronym spells a word that everyone can be proud of.
- Translation: does the name translate well from English to French (or vice versa)?

An example is the ESVI name created by the energy company, TransAlta: TACT — TransAlta Community Transformers.

The name of Canada Safeway' employee initiative is “ Because We Care”.

We'll talk about creating a logo and branding the ESVI in Phase 4.

### **Step 6: Community Consultation, Selection and Project(s) Creation**

#### **External Stakeholders: Community**

Now it's time to involve your external stakeholders in the development process. Although there are many members in the community stakeholder group, the focus for our purposes is on the nonprofit organizations that stand to benefit from an ESVI.



The ESVI committee needs to decide if the initiative should support an issue in the community or a particular nonprofit organization. Supporting an issue could mean volunteer activities with a number of organizations. For example, if one of the issues identified is hunger, the ESVI could align with groups that support the need for nutritious breakfasts for marginalized school children; soup kitchens that feed the homeless; the local food bank; and groups who provide meals to seniors and extended care patients.

If you choose an issue or cause in the community, understand that more research needs to be done. You could implement a community survey but this can be costly and time consuming. In most cases, other groups have already collected the information you are looking for. Excellent sources of community needs assessment information are your local United Way, Chamber of Commerce and/or Volunteer Centre. Municipal government is another good source. Given its commitment to community development issues, there is likely a wealth of information available to you at City Hall.

If the impetus is to support an individual organization, you already have most of the information you need. Employee surveys and focus groups have revealed the organizations where employees volunteer and the community issues they support or are interested in supporting. Your own research on company values, business goals and senior management objectives provides the information you need to help decide which organizations could be the best fit with internal stakeholder interests.

Rather than making a top-down decision, as in "we know what's best for the community," it is most important to undertake a community consultation process.

Make a short list of potential organizations identified with the issue areas you could support and set up discovery meetings with each. Meet with them in their own organizations to get a sense of how they operate.

Once you have decided which community organizations would be in best alignment with identified areas where employees want to make a difference, ask each organization to submit a proposal, not unlike the Request For Proposal (RFP) you would use if you were putting another business initiative out to tender. By doing so, you empower the community to be legitimately engaged in developing your ESVI.

The RFP can be very simple. Ask them to present you with options and recommendations as to their needs and to describe how they would engage your employee volunteers. Let them know you are asking for a proposal from each of the organizations identified in your research and that you will go through a review and selection process to determine which is the best match for employees, company and community.



Their proposal should identify:

- how they would like company employees to be involved;
- exactly what projects/activities the volunteers will be engaged in;
- what resources they have/need (material, financial, expertise);
- numbers of volunteers needed;
- variety of ways to get involved (team effort, individual effort, different activities);
- when and where the activities take place;
- duration of volunteer commitment (episodic, weekly, two-year board position, e.g.);
- how they plan to recognize employee volunteers;
- whether supervision is required or provided;
- how they intend to assess the outcomes (tracking, measurement, evaluation);
- why they believe your company should select their proposal; and
- any partnerships with other organizations.

When reviewing each proposal, focus on whether the request fits the mission of the ESVI and meets company and employee criteria identified in your research. Once you have found the closest match, be sure to respond to the organizations not selected with a brief rationale of why you were unable to select them at this time.

The next step is to sit down with the key people from the organization(s) you have selected and make decisions about what can be done and how all parties will go about it. Remind them you still need final approval from senior management and will inform them once a decision has been made. Summarize proposed projects and/or activities and add to your planning document.

## **Step 7: Resources: Human, Financial, Expertise**

Now the team needs to identify the resources required to carry out the activities you and your community organization have planned. Consider the range of resources to follow.

### **Human Resources**

Every business initiative has staffing requirements. Once the planning is done, who will do the work? Develop your plan to include adequate staff, employee volunteer and services. Can you hire an external consultant to oversee and coordinate the functions of your ESVI? Perhaps your coordinator could be a full-time or part-time staff person (within public affairs, community relations, or human resources) who can be reassigned to work with the ESVI to manage the initiative.



## **Financial Resources**

Ensure that senior management can make funds available for the initiative. Amounts of funding required depend upon the goals and expected outcomes of the initiative and the volunteer activities you have planned. Once you have developed your plan, the finance officer on the ESVI committee needs to build a proposed budget based on what the committee believes the company can support. Include such things as amounts for a salaried coordinator, if applicable; administrative services; costs associated with communicating the initiative (such as graphic design and production of print materials, or launch/kickoff), project/activities costs and recognition costs (for example, gifts, memorabilia, dinners ). The budget will be one of the first components senior management will review before making their final decision to support the ESVI. Be creative and be realistic.

## **Expertise/Alliances/Partnerships**

Many local, regional and national organizations are available to support your needs. Please see the section on resources at the end of the document.

## **Step 8: Getting the Green Light**

Now that you have all the elements of your ESVI plan, it's time to go after final approval from senior management. Put together a package with the initiative's vision, focus, policies, goals, proposed projects and activities and what will be required from management in terms of resources. Reinforce the benefits your ESVI can provide the company. Present your plan and feel confident of winning their endorsement to proceed.

Once you have the green light, you will need to communicate and promote your ESVI to all stakeholders. Let's move to Phase Four: Making it Work.



## Communication And Promotion

The success of your ESVI is directly related to how effectively you communicate the initiative to your stakeholders. Let's look at some of the challenges and opportunities you will face. Then we'll show you how to overcome them and make the best of your opportunities through a simple communications strategy.

### Challenges

There are three main reasons an ESVI can fail:

1. lack of company support;
2. inability to motivate employees; or
3. lack of community awareness and support.

These issues and more can be resolved by developing communication strategies targeted to the members of each of your stakeholder groups: company, employees, and community.

## Step 1: Communication Basics

### Objectives

Let's review the basic elements of an ESVI communication strategy. The first step is to identify your objectives. This is done very simply by expressing your challenges in a positive manner. For example:

ESVI Communication Objectives:

1. To engage the enthusiastic, ongoing support of senior management
2. To motivate and engage employees (launching the ESVI)
3. To raise awareness and support of the ESVI in the community (external launch).

Once objectives are spelled out, you need to reach your “audiences”: senior management, employees and community. How you communicate will depend on which group you are targeting and which tools are most effective. Some communication tactics can be used for all three groups, some will stand alone.

### Identity

At this point, you want to create an identity for your ESVI. You have a name for it, now what will help stakeholders remember it?



What is needed is a visual representation or brand that will be recognized and remembered. Work with a graphic designer to create a distinctive logo.

When directing the designer, there are a few points to consider.

1. The most important rule is to **KEEP IT SIMPLE**.
2. Strive for a corporate flavor with a community feel. The logo should have elements of the corporate logo or wordmark so people come to recognize the ESVI as an initiative of your company but it also needs to reflect the vision of the ESVI.
3. It can be a simple stand-alone graphic element or can be combined with a “wordmark,” a short phrase that represents the mission. For example, the identity for Canada Safeway's community initiative uses the Safeway corporate colours, the corporate logo, and the words, “because we care.”

The stylized heart enclosing the logo and wordmark adds the final touch.



4. Or you may choose to create a word mark and a graphic look that illustrates the purpose of the initiative, as SaskEnergy has done with its Share the Warmth initiative. Known locally as the “Warm Fuzzies” project, its mission is to recycle sweaters and other warm fuzzies for those in need (see case study at the end of this document).



5. If reproduction costs are an issue, create no more than a two-colour version.
6. Regardless of how many colours you use, always check to see how it looks in black and white (to work on a fax and for low-end print materials).



7. Consider how the name and the logo will fit on letterhead and other print materials as well as a variety of recognition items such as banners and t-shirts. It should stand out and be clear and bold to be easily recognized.
8. Have your designer create two or three versions and then test it on members of your ESVI team and senior management advisor to help select the most appropriate version.
9. As you may come to have more than one project under the ESVI umbrella, you will want to choose names and/or wordmarks for each project that incorporate the branding you create for the ESVI. SaskEnergy's Share the Warmth initiative has grown now to include a book-recycling project. You can see by this example how they have created branding for this project that is easily identifiable as part of the original ESVI.

### **Tactics And Tools**

Your new logo will be used in all print, electronic (for example, on a website) and promotional materials to reinforce the initiative's identity. Print and electronic materials you create can be used to reach most of your stakeholder constituents.

As a rule of thumb, most materials should include:

- mission statement
- identity unique to the ESVI (logo/wordmark)
- the reasons for creating the ESVI
- a description of the ESVI and how it works
- a call to action - how to get involved
- contact information (phone number, email address)
- a response/feedback mechanism

Communication materials to consider producing include:

- letterhead, envelopes, generic business cards for employee volunteers
- brochures
- posters
- outdoor/indoor banner for display at events and activities
- print newsletter or insert for company newsletter
- page on the company web site
- Intranet page, employee email templates
- appropriate items such as ball caps, t-shirts, coffee mugs, mouse pads, decals, or logo pins and buttons



There are many tactics you can use to communicate successfully with stakeholders. To save time and avoid duplication, break your stakeholders into two camps and plan your tactics for each:

- internal audiences (company, employees)
- external audiences (community)

Let's start with internal audiences and then move to external audiences. Keep in mind this is not a linear process. Elements of each can be developed concurrently and can be used to reach both.

## Step 2: Reaching Internal Audiences: Company and Employees

### Company: Senior Management

Communication Objective: To engage the enthusiastic, ongoing support of senior management

*“Reality is that without management support, Shell would not have the staff participation that we do. Leadership by example has made the difference; the pace is set right at the top, starting with the President. Management support is key to employee involvement in the community.”*

Barry Maguire  
Shell Canada Ltd., Calgary

### Tactics:

There are a number of tactics you can use to engage senior management. Keep time constraints in mind and simply present highlights of the ESVI as an overview.

#### 1. Generate Enthusiasm

- Strut your stuff. Unveil your logo and print materials.
- Invite a representative from your selected community organization to provide an overview of community benefits.
- Designate an ESVI spokesperson and have he or she highlight benefits reaped by employee volunteers that further company objectives.



## **2. Get Them Involved**

Involve senior management in volunteer activities. Once they have first hand experience, many will be hooked. Here are some ideas.

- Volunteer for a board or committee position at a community organization.
- Take part in hands-on activities outlined in the ESVI.
- Participate in a one-time (episodic) activity.
- At the least, participate in a launch and/or recognition event.

## **3. Education and Training**

Some individuals may lack experience or be unaware of the many facets of volunteering.

- Hold an educational session to cover the basics. Arrange for a spokesperson from your local volunteer centre or United Way or a peer whose company has an established ESVI.
- Follow up on employees' interests.

## **4. Regular Reports**

Keep the interest of senior managers by providing regular reports on the activities and accomplishments of your initiative. Include the following:

- the results of your tracking and evaluation efforts including goals achieved;
- any improvements you would like to make that require their approval;
- progress reports from your ESVI's community organization(s); and
- a summary of feedback from employees.

## **5. Media Coverage**

Part of your committee's job may be to attract media attention and generate positive stories about the company's involvement in the community. Keep a file of media clippings and present for review at regular interviews (more on media relations can be found in External Audiences, to follow).

## **6. Awards/Recognition**

If you can generate recognition from the community and the organization(s) served by your ESVI, these will lend credibility to your efforts. When you hold your own recognition events, be sure to invite senior managers to speak and/or attend.



## Employees

Communication Objective: To motivate and engage employees (launching the ESVI)

*“I volunteer for a variety of company-sponsored volunteer initiatives including Junior Achievement, ESIS trainer, the Blood Donor Clinic Committee, Staff Association Presidency and teaching at the Fitness Centre. With a busy work and family schedule, I probably would not volunteer at all if it weren’t for the ease of being able to participate in these activities through work. I derive a great deal of satisfaction from helping others. And these volunteer activities offer the opportunity to meet and network with people from all over the company. Most importantly, they make work a much more enjoyable place to go.”*

Eduardo Behar  
Manulife, Toronto

### Tactics:

Here are several recommendations that will immediately put energy into your new volunteer initiative:

- CEO/President endorses the initiative and is actively involved as a regular volunteer.
- Written information regarding the initiative and how it works is distributed to all employees.
- Details on how to participate are specific and easily available.
- Opportunities for involvement are varied (various causes, team effort, individual effort, different time commitments) and available.

Keep in mind that your employees already have a certain level of awareness of the ESVI because of their participation in the employee surveys and discussions. It is critical to the success of the ESVI to motivate and engage employees as quickly as possible. It's time to launch the initiative.



## To Begin

- Send out an interoffice memo or general notice on the internal electronic mail system to introduce the ESVI to employees. Describe the initiative and how employees helped develop the vision and plan.
- Emphasize the fact that the initiative is voluntary and will be powered by employees, not management.
- Congratulate employees who are already volunteering, articulate company support of their continued involvement and invite them to participate in the ESVI.
- Encourage non-volunteering employees to consider getting involved.
- Invite all employees to attend an introductory information session to learn more about the ESVI and how the company plans to support it.
- Provide a response mechanism, encouraging employees to attend.
- Ask their preference for a meeting time: breakfast meeting, lunch, mid-morning or mid-afternoon, or after business hours? This helps to set the tone of employee empowerment rather than top-down directives.

## Internal Launch

You can treat this meeting as an informal, internal launch of the initiative. Keep in mind it is important to establish credibility, vitality and relevance as quickly as possible. The presentation should last no more than 30 or 40 minutes. Coach participants to be upbeat, positive and enthusiastic in their delivery. Those who should be involved in the presentation include:

- you and/or your ESVI coordinator/spokesperson;
- CEO;
- employee volunteer spokesperson; and
- spokesperson from the cause/community organization supported by the ESVI.

The three most important elements of your launch are:

1. Information
2. Venue
3. Refreshments



## 1. Information

Put together an information package to include:

- results of employee surveys;
- a brief description of the ESVI, using the new letterhead and/or your new brochure;
- information on how to get involved and a call to action (ie, sign up sheet);
- a fact sheet on the issue/organization on their own letterhead and/or a brochure; and
- a trinket, if budget allows, such as an ESVI button or pin.

Hand out information kits at the beginning of the meeting to encourage people to review or at least glance over the materials before you get started.

## 2. Venue

Make sure you have a venue appropriate to the size of the session. This could be the employee lunchroom, the boardroom or a nearby conference facility. Keep your presentation informal. Think of it in terms of a simple “lunch and learn” event. If you have them, put up several posters and your banner at the meeting site.

## 3. Refreshments

Providing food and drink or light refreshments is an excellent incentive for attendance and emphasizes the casual, informal tone of the launch. This is a tried and true means of assuring a high turn out.

Begin your presentation. Here is a sample agenda:

1. Welcome and thank you remarks from ESVI spokesperson, who then introduces...
2. the CEO, who announces the name of the ESVI and unveils the logo, then recognizes employee volunteers and reinforces company support. CEO introduces...
3. employee volunteer spokesperson who gives a short motivational talk, then introduces...
4. guest speaker from the ESVI community organization who presents a brief synopsis of programs and services, how the employees can get involved and how their involvement will help the community.



Afterward, open the floor to questions and answers and then encourage people to take immediate action and get involved. ESVI team members should be ready with sign up sheets.

For those who can't attend, make sure they get the information package you hand out at the meeting. Positive word of mouth from employees who attended is also an effective means of reaching prospective employee volunteers.

As in the senior management scenario, be prepared to provide education and training sessions to establish a comfort and competency level with employee volunteers. This can usually be handled in one session, followed up with tip sheets and other relevant information as needed.

Once the initiative is in full swing, be sure to send out regular updates using appropriate communication channels: internal email, memos, newsletters, and bulletins. Be sure to take lots of pictures at events and activities and include them in your communication vehicles. Always include a feedback mechanism requesting employee input and suggestions. Your ESVI coordinator can act as an ombudsman to pass on employee volunteer concerns and suggestions to the committee as the initiative progresses. Methods of retaining volunteers are covered in Reward and Recognition.

### **Step 3: Reaching External Audiences: Community**

Communication Objective: To raise awareness and support of the ESVI in the community (external ESVI launch).

Throughout this document, we have identified and focused on the community organization as the main constituent of your community stakeholder group. At this point, good communication channels are in place and information is flowing in both directions. Now it's time to raise awareness with the other constituents of your community stakeholder group to gain public support of the ESVI.

Your external audiences are a fairly diverse group. Members include, but are not limited to:

- the media
- consumers/customers
- volunteers
- educational institutions
- community associations
- neighbours
- voluntary sector organizations
- government
- politicians



## **Tactics**

The best way to reach the various members of this audience is through a public launch of the ESVI, with members of the media invited to attend and cover the event.

Steps to incorporate:

### **Date, time and place**

Aim for a day and time where you won't be competing with major news events. Pick a venue that is easily accessed by guests and media.

### **Guest list**

Compile a list of all relevant stakeholders and send out invitations in advance. Follow up to confirm attendance.

### **Participants, launch agenda**

Use the same participants and agenda as for the internal launch. Keep speeches crisp and brief.

### **Media relations**

Depending on the size of your organization, you likely have someone who handles public relations activities, external communications and/or media relations. With luck, you have already managed to engage this person on your planning committee. Seek out expertise on how to handle the media.

Some pointers:

- **Originality:** be creative with your event to attract media attention.
- **Media list:** blend your company's business media list with your charitable organization(s) list to ensure you have representatives who cover community and voluntary sector issues. Aim for a good mix of print, radio and television on your list.
- **Communication tools:** media advisory and news release. Use internal resources to help you prepare and send out these pieces.
- **Create a media kit:** your information kit used at the internal launch becomes your media kit with the addition of the news release. Make the kit available to members of the media who attend and courier to those who are unable to attend, timed to be received as the launch gets underway. Basically, the kit contains everything the media needs to write the story, whether they attend or not.



### **Alternatives to Public Launch:**

If budget does not allow for a public launch, follow the plan to send out the news release when you are ready to announce your ESVI. Spokespersons for both organizations should be available to provide additional information.

Another suggestion is to combine resources with your community organization so some sort of public launch can be held. It doesn't have to have all the bells and whistles of a major event. As long as your media relations element is strong, you will reach the greater audience in the community.

### **Ongoing Tactics for Communicating with Community**

Once the initiative is established and employee participation is at a desirable level, inform local community organizations such as the volunteer centre and the local branch of the United Way on the logistics of the initiative. This will ensure information on your ESVI is readily available to anyone in the community who expresses an interest. Remember that leadership groups in the voluntary sector can be excellent resources regarding community needs and issues that could be incorporated into your ESVI. As the initiative gains momentum, be sure to follow up with all your community stakeholders in terms of updates and periodic progress reports. Keep in touch regularly with your media list when you have ESVI milestones or stories of interest to report.

(See Resources and References for how to access more detailed information on communicating and launching your ESVI)

### **Sustaining the Momentum**

Periodic "awareness days" to rekindle the energy or publicizing upcoming volunteer opportunities may be necessary throughout the year. National Volunteer Week in April would be an appropriate time to create further awareness. Celebrate milestones in the program, the differences employee initiatives have made in the community, the focus of the program and its successes to date. Be sure to have project sign-up sheets and teasers of future projects available for pick up.

Now it's time to look at the two remaining aspects of sustaining and perpetuating the ESVI. Rewarding and recognizing employee volunteers and evaluating the initiative are the keys to its longevity. These can be considered part of the communication strategy. Reward and Recognition is next, but we have given Evaluation its own section (Phase Five) to highlight the critical importance of this process to the ongoing success of your ESVI.

*National Volunteer Week is an excellent time to recognize employee volunteers, begin a new volunteer project, or launch an employer-supported volunteer initiative. It takes place annually during the third week in April.*



## Step 4: Reward and Recognition

### Reward + Recognition = Retention

Motivation, retention of volunteers, enthusiasm and improved employee morale are all benefits realized by companies who take the effort to recognize employees who participate in the ESVI.

Recognition for employee involvement is critical to the success of any level of ESVI.

It is absolutely essential your CEO stays involved and continues to articulate the value of the ESVI to company and community. Senior management acknowledgement and recognition of volunteer employees should be highly visible.

Quote the CEO in newsletter articles, information pamphlets, and recruitment pieces and publish articles in company and community newspapers. Direct CEO participation in volunteer activities and recognition events is recommended.

Recognition can take the form of earning approval from senior executives through:

- personalized accolades from senior management;
- supporting employee efforts by allowing paid time off for workday volunteer activities, once a certain number of volunteer hours have been logged; or
- rewarding employees who go the extra mile with a cash bursary to their charity of choice.

Your ESVI committee may want to piggyback on National Volunteer Week and the various, national, provincial, and municipal events and activities that recognize volunteers. You could also look for recognition opportunities with the organization(s) you support. Many have recognition strategies that you can tap into.

### Additional Suggestions

- Select an Employee Volunteer of the Month based on peer feedback and profile the individual internally and externally (company and community).
- Host periodic recognition events, inviting family and community members to celebrate ESVI successes and outstanding volunteer contributions.
- Recognize employee volunteer hours in terms of increments of service (for example, 10 hours, 25 hours, 50 hours) with ESVI service pins or other suitable gifts.
- Golden rule: ask your volunteers how they would like to be recognized.



## **Understanding the Need**

Many ESVIs fail because this important final step is missed. To perpetuate your initiative you need to evaluate it on a regular basis to find out what's working and where improvements can be made. Like any other business initiative you have to prove its value so you can continue to receive the funding, resources and support required.

Tracking and evaluating results and measuring the effects of your ESVI provides information on the impact the initiative is having on the company and on the issues within the community. The evaluation also provides important information to set future directions.

The evaluation process closes the loop and completes the circular process involved in sustaining any business initiative. It brings you back to the beginning where the process starts anew, stronger and more vital than before.

## **Step One: Mechanics of Evaluation**

Here's how to get started:

### **Stakeholders**

List the main stakeholders of the initiative (for example, employees, community organizations, senior managers, advisory committee/ESVI committee). These are the people that will provide the feedback you seek and to whom you will report your findings.

Determine what you and your stakeholders want to achieve by evaluating the initiative, who will use the evaluation information, and what resources are required to carry it out.

### **Timetable**

Establish an evaluation timetable in terms of the form of evaluation to be undertaken, how often it will be conducted and communicate this information to evaluation participants. In most cases an annual evaluation will suffice. The form of your evaluation is discussed in Step Three, to follow.

### **Review ESVI Goals, Articulate Outcomes**

When you were developing the plan for the ESVI, you defined a number of goals and objectives you wished to achieve. With clear and measurable goals established at the beginning of the initiative, the impact of the ESVI is easy to monitor.

Evaluation is simply a process of finding out if goals were met and objectives were achieved. Revisit the goals you outlined and rephrase them as outcome statements,



Then decide on how to best to discover if the ESVI achieved the desired results.

Here are some examples:

- Goal: to build the strength of company teams.
- Outcome statement: Employee team building skills were strengthened.
- Evaluation:
  - What teams participated?
  - What activities took place to practice communicating, to experience trust, to build respect?
  - What did employees learn about working with peers?
  
- Goal: to develop new community or business contacts.
- Outcome statement: New contacts were established in the community and in the business sector.
- Evaluation: Which community organizations or other companies participated in the volunteer work?
  
- Goal: to experience and learn about important social issues (family violence, homelessness, literacy, etc.)
- Outcome statement: Internal stakeholders have a greater awareness of social issues and community concerns.
- Evaluation: Review what information was given to volunteers, poll employees about what learning opportunities were to be had and how the experience has affected their view of the issue.

## **Step 2: Decide on the Process**

Now you need to look at how you will go about evaluating results. Select your evaluation process based on your outcome statements. There are a number of methods you can use. Here are three of the most common, along with the pros and cons of each method.

### **1. Case Study Evaluation**

In some instances, companies use case studies based on interviews and observations or a description of specific situations encountered by participating employees.



Advantages of Case Study Evaluation	Disadvantages of Case Study Evaluation
<ul style="list-style-type: none"> <li>• Focuses on the content and meaningfulness of what the ESVI accomplishes</li> <li>• Company is able to monitor the program's size, the level of volunteer activity of employees and the scope of the ESVI's involvement in the community</li> <li>• The company will also be able to monitor the growth rate and cost effectiveness of the program</li> </ul>	<ul style="list-style-type: none"> <li>• Difficult to design properly</li> <li>• Depending upon the questions asked, this evaluation method may not indicate how the ESVI is working and/or the effect it is having on its stakeholders</li> </ul>

### 3. Process Evaluation

This form of evaluation determines how effectively an initiative or activity is being managed. It is used most often to evaluate how particular elements of the ESVI are operating but not necessarily the overall results. For example, if the company were planning to recruit volunteers through the company newsletter, through this form of evaluation the administrator would evaluate how well this method accomplished its goal.

Advantages	Disadvantages
<ul style="list-style-type: none"> <li>• Offers an opportunity to refine and redesign the ESVI's operations and procedures</li> </ul>	<ul style="list-style-type: none"> <li>• May generate little information on the scope and size of the initiative</li> <li>• May generate little information on the success of the ESVI to address communities needs</li> </ul>

After reviewing these various methodologies, your committee can decide which tactics to employ. You can choose one method or a combination, depending on what it is you want to know.



## Step Three: Gather the Data

Through the use of a written survey, reports from participants, and other formal information tracking systems, you can gather and analyze information about the ESVI.

Data most often tracked throughout the ESVI includes:

- number of employee volunteers that participated;
- number of volunteer hours;
- number of activities or projects the volunteers are involved in;
- types of volunteer involvement (technical advice, manual labor, serving/helping hands, board positions, e.g.);
- number of community service organizations that are assisted/served by the ESVI;
- skills, competencies used, practiced, or gained; and
- impact statements/testimonials from those benefiting from the efforts of employee volunteers.

## Measuring the Value to the Company

While most evaluation techniques focus on the impact an ESVI has on the employees and the community, some time should be spent addressing how the initiative links with business strategies. Look beyond the numbers to see if there are relationships between the ESVI and your company's overall business goals. Go back to the questions you asked when creating the goals of the initiative and see if the answers are satisfactory. For example:

- How does the ESVI help workers perform their jobs, gain professional skills, team build, think creatively and contribute to job satisfaction?
- How does your ESVI's effectiveness compare to that of peer companies?
- Does the initiative leverage the company's ability to attract and retain quality employees?
- Is it strategically linked to the company's products or services? Is it linked to the philanthropic strategies?
- Has positive media exposure increased? Has the corporate reputation improved?
- Are people more likely to buy certain products or use the company's services during a given period? Can an increase in business be linked to the publicity gained from participating in a community cause?



#### **Step 4: Communicate Findings, Review the Plan**

Communicate the results of the evaluation to management, employees, those who participated in the evaluation and any other stakeholders and discuss how the results will affect the direction of the ESVI.

Review the ESVI's strategic plan and make adjustments based on your findings.

Remember that without evaluating your results and revisiting your original plan to make changes and improvements, it will be difficult to perpetuate the initiative.

Congratulations! You've walked through all the steps. Now you have all the basic tools to create an ESVI in your company.

In considering an employer-supported volunteer initiative, there are many challenges and there are many benefits. Each company is different in the way it operates, communicates, interacts, and motivates its employees. Each has unique ways of operating within a community and participating in community life.

The information in this resource is designed to assist with the development of any employer-supported volunteer initiative — short-term and informal through to year-round and formal.

Your company can choose to do once-a-year types of activities such as participating in building a home with Habit For Humanity or you could choose to establish a more formal employer-supported volunteer initiative involving a deeper level of commitment and support from stakeholders.

A sound ESVI will take time to pull together; however, the benefits to all stakeholders are manifold. Follow the steps in this resource. Look to the resources we've provided for additional guidance. You have all the tools to mobilize employees in your company and earn the long-term support of senior management.

*“Volunteering in the community is where Chevron employees get to display the Chevron spirit. I think it's great that the company encourages community involvement and provides opportunities that allow team building with fellow employees outside the workplace. After volunteering, I always walk away feeling that I have made a positive impact on the community. It is through corporate support that community programs can thrive. I am very proud to be part of a company that cares about the community.”*

Rose Marasco  
Business Development Analyst,  
Chevron Canada Resources (Calgary)

To follow is a case study on SaskEnergy as an example of what other companies are doing in the area of employer-supported volunteer initiatives. More case studies will follow, online at [www.volunteercalgary.ab.ca](http://www.volunteercalgary.ab.ca). Send us your story and we'll add it to the website so others can learn from your example.

Good luck!



### **SaskEnergy — Share the Warmth**

SaskEnergy is a 13-year-old provincial Crown corporation with roots of more than 45 years in Saskatchewan. It is the province's natural gas distribution utility, purchasing gas from independent suppliers, using its 64,000 km distribution system to provide energy to more than 317,000 homes, farms, commercial and industrial customers in over 585 Saskatchewan communities.

After breaking away from SaskPower, SaskEnergy was struggling to emerge with an identity of its own. Senior management pondered that finding a unique way to participate and contribute to the community could help strengthen their fledgling identity and build good will with their customers.

SaskEnergy executives returned from a natural gas utility conference in the United States with the idea of an autumn campaign to collect and distribute sweaters for those less fortunate around the province. It was a good fit for a company in the business of keeping people warm. They saw it as a company-supported volunteer initiative that could include all SaskEnergy employees. In 1994, the Share the Warmth Sweater Recycling project was born and employees began volunteering to collect and distribute second-hand sweaters.

Saskatchewan has one of the highest per capita rates of volunteerism in Canada. People here have a long history of helping each other. The Share the Warmth Recycling Project quickly caught on with employees and customers alike.

At the outset, the initiative consisted of one special day in a particular city. Approximately 20,000 sweaters were collected in the first year and distributed to those in need to help them stay warm throughout the cold Saskatchewan winter.

The program was tracked and evaluated annually. After three years, it was discovered the initiative was leveling off. It was time to expand from the local level to a province-wide campaign. The company opened it up to any community group in the province who wanted to help. By 1997, new partner groups such as 4H clubs, Girl Guides, Scouts and high school student groups could register with SaskEnergy and receive guidelines and support for their own sweater collection efforts.

Branded as the Share the Warmth Recycling Project, it has been repositioned as the “Warm Fuzzy” campaign and includes the donation of sweaters, mittens, gloves, toques, scarves and even blankets. 2001 has seen the introduction of collecting children’s books to be distributed through the Saskatchewan Literacy Network in the same way the United Way helps to distribute the clothing items. The new partnership with community groups has exceeded expectations. Managing the project has become a full time job for part of the year and there is now a seconded position within the company to coordinate Share the Warmth activities in the northern part of the province.



In 1999, Share the Warmth expanded to various other community relations programs and in particular, the Share the Warmth Fund. The company makes funds available up to \$2,500 for individual community groups that qualify in the company's interest areas of education, community initiatives and "Saskatchewan Pride." A province-wide advisory council made up of SaskEnergy employees receives requests for funding and makes decisions based on the fit with the initiative's broad based, grass roots commitment to community. By decentralizing decision-making and empowering employees to make funding choices, all stakeholders have benefited. Some of the recipients have extended their partnerships to work with SaskEnergy employees on other community-focused projects.

The various Share the Warmth initiatives have produced positive outcomes not anticipated by the company at the outset. While senior management brought home the initial concept, it is through the dedicated engagement of the company's community relations professionals that the expansion and value of the initial ideas have been realized. An additional benefit is employee volunteers have shown a significant improvement in team building skills. They are integral to the company's community relationship building and their voluntary efforts spell the success of these programs. There is a great sense of pride and ownership among employees and in the community. SaskEnergy has achieved its business objective of increased visibility in the community and stand-alone identity.

#### **Warm Fuzzy 2000 Statistics:**

- 200 staff (20 per cent) participated
- 1,800 volunteer hours to collect and distribute warm fuzzies
- 37 liaison teams around the province
- 73,000 warm fuzzies collected
- 163 communities involved/served
- 215 schools participated
- Total "warm fuzzies" collected over the past 7 years: over 300,000
- Current employee participation in programs and initiatives: 46 per cent

For more information on SaskEnergy's Share the Warmth programs and its other community initiatives, please visit the website at: [www.saskenergy.com](http://www.saskenergy.com).



**Volunteer Canada** — Volunteer Canada is the national voice for volunteerism in Canada. Volunteer Canada's board members, partners and members represent hundreds of different communities across Canada. Volunteer Canada actively engages in research, training and other national initiatives designed to increase community participation. The organization provides leadership on issues and trends in the Canadian volunteer movement. Volunteer Canada can be contacted by telephone at 800-670-0401, by email at [volunteer.canada@sympatico.ca](mailto:volunteer.canada@sympatico.ca) or on the web at [www.volunteer.ca](http://www.volunteer.ca).

**Volunteer Calgary, Calgary Workplace Volunteer Council (CWVC)** — Check the website to find examples, case studies, and further resources that can help you prepare your ESVI. You will also find a detailed version of the communication basics outlined in this document, entitled, “Communication Basics: Launching an ESVI”, [www.volunteercalgary.ab.ca](http://www.volunteercalgary.ab.ca)

**IMAGINE** — Founded in 1988 as an initiative of the Canadian Centre for Philanthropy, IMAGINE is a national program to promote corporate support for Canada's voluntary sector. Through IMAGINE's Caring Company program, over 550 Canadian companies have committed to giving a minimum of 1 per cent of pre-tax profit to voluntary and charitable organizations, and to encourage employee giving and volunteering. In addition, IMAGINE has over 1,300 nonprofit charity and community partners that are committed to building and sustaining communities across Canada. Many Caring Companies actively encourage employee volunteerism in a variety of ways. This organization is an excellent resource and can be contacted at 416-597-2293 (extension 229), or by email at [info@imagine.ca](mailto:info@imagine.ca) or on the web at [www.imagine.ca](http://www.imagine.ca).

**Canadian Centre for Philanthropy** — This is a national charitable organization dedicated to advancing the role and interests of the voluntary sector for the benefit of Canadian communities. It is a membership-based leadership organization for charitable organizations and the corporations and foundations that support them. The Centre generates and gathers information and analysis on the environment in which Canadian nonprofit organizations operate. It helps strengthen these organizations through public affairs, research, information resources, and the IMAGINE program. The Canadian Centre for Philanthropy can be contacted at 416-597-2293, by email: [general@ccp.ca](mailto:general@ccp.ca), or on the web at [www.ccp.ca](http://www.ccp.ca).

**The Conference Board of Canada** — The Conference Board of Canada's Canadian Centre for Business in the Community (CCBC) established the Corporate Community Investment program to help organizations advance their community investment initiatives as integral to their overall business strategy. The Conference Board of Canada can be contacted at 613-526-1747. You can contact them by email via their website at [www.conferenceboard.ca](http://www.conferenceboard.ca)



**United Way of Canada** — United Way organizations support a network of community care and work at the community level to develop new and more effective ways of delivering solutions. These organizations mobilize the community's resources and provide funding to essential services. They work with other funders and community organizations to address social issues. You can reach United Way's national office at 613-236-7041, by email: [info@unitedway.ca](mailto:info@unitedway.ca) or on the web at [www.unitedway.ca](http://www.unitedway.ca).

**Your local volunteer centre** — Always an excellent source of community information. Check your telephone directory for the number in your area or visit [www.volunteer.ca](http://www.volunteer.ca).

**Colleges, Institutes, Universities** — Many educational institutions across Canada work with individuals and organizations to improve the managerial effectiveness of the nonprofit sector. Charity Village keeps a list of learning programs on their web site at <http://www.charityvillage.com/learn/index.asp#npomgmt>.

#### **Additional Resources:**

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Connors, T., ed. (1995) *The Volunteer Management Handbook*. New York: John Wiley & Sons.

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Parker, M. (1999) *Partnerships: Profits and Not-for-Profits Together*. Edmonton: The Muttart Foundation.

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The Conference Board of Canada (July 1997). *Establishing a Corporate Volunteer Program*. Ottawa: The Canadian Centre for Business in the Community.

\_\_\_\_\_. (1993). *Corporate Volunteer Programs: Benefits to Business*. Conference Board Report 1029. Ottawa: The Conference Board of Canada

Business Council on National Issues, *Jobs, Growth and the Community: Large Enterprises at Work* (Ottawa: BCNI, June 1997)

Imagine (1999) *Connecting Companies to Communities: A Guide to the Design and Management of Community Investment Programs*. Canada.



Points of Light Foundation (1996). *Developing a Corporate Volunteer Program*. Washington, DC: Library of Congress Catalogue No. 92-91212

LBG Associates (2001) *Corporate Volunteerism: Innovative Practices for the 21st Century*. USA

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Adapted from Petro-Canada (May 1998). Petro-Canada employee/retiree volunteer survey. *In Brief: Special Edition*. Calgary: Petro-Canada, pp. 25-26.

Adapted from Lautenschlager, J. (1993). *Volunteering in the Workplace*, Voluntary Action Directorate, Department of Canadian Heritage. ISBN 0-662-22222-9