



Rediscovering a Strategic Resource: Your Employees

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In 1996, at the beginning of what would become a growing trend for U.S. companies, Philip Morris Companies, Inc. (now known as Altria Group, Inc.) made a radical decision: to stop participating in United Way campaigns and to revitalize its employee involvement program with an employee-driven, employee-run workplace giving campaign and grantmaking process.

Altria Group revamped its employee involvement program for two primary reasons. First, the company wanted to reinvigorate its workplace giving campaign; the number of pledges and employee participation had leveled off for the United Way campaign. Second, the company recognized its employees' growing desire to strengthen connections with their communities and to play active roles in deciding which nonprofit organizations received their financial support.

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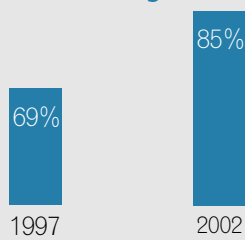
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Exhibit A: Number of Companies with Volunteer Programs in the US



Source: Points of Light Foundation, 1999.

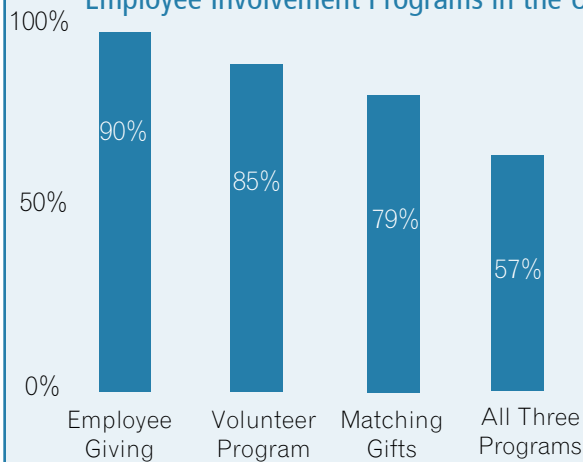
For the first time, Altria Group encouraged employees to engage in all aspects of an employee involvement program, and over the next several years this decision affected employees at its various operating companies, including Kraft Foods, Philip Morris USA, and Miller Brewing Company.¹

As part of this desire to more deeply engage employees in corporate community giving, Altria Group sought a mechanism that would address causes and issues that were more closely aligned with the Company, the interests of employees, as well as the specific needs of each of its companies' communities. In short, this mechanism needed to facilitate a more tangible positive change in the corporate communities where employees of Altria's companies lived and worked.

From this vision, Altria Group designed an alternative to the United Way campaign: the Altria Employee Fund—a separate 501(c)(3) charitable giving organization recognized by the IRS as a public charity. Employees are directly involved in every key aspect of this Fund: raising campaign dollars, determining grantmaking focus areas through surveys, identifying eligible non-profit organizations, reviewing proposals, selecting grantees, and presenting checks to recipients. With assistance from TCC Group, several of the Altria companies operate an Employee Fund. (See the Case Study on page 9 for more information.)

In 2001, Altria Group commissioned TCC Group to conduct a five-year review of the first Employee Fund, the Altria Employee Fund (AEF)². The review found that the Fund benefited Altria Group, its companies employees, and participating nonprofit organizations in the following ways:

Exhibit B: Number of Companies with Employee Involvement Programs in the US



Source: Points of Light Foundation, 1999.

- Higher employee morale (a source of tremendous pride in the workplace)
- Increased participation and average financial contribution of employees
- Improved quality of and access to programs and services for community members.

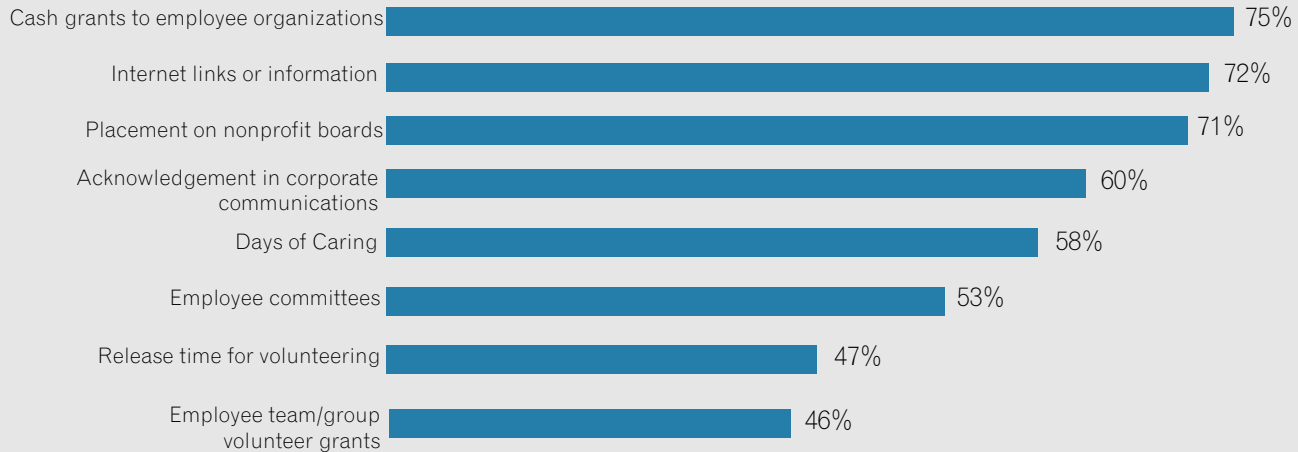
With the creation of the Employee Funds and a revitalization of a key community involvement program, both employees and the community share in the benefits delivered.

Employees: A Company's Most Valuable Asset

Many companies are beginning to recognize, as Altria Group did in 1996, that employee involvement programs are a critical part of successful community involvement programs. Employee funds are just one example of the continuing evolution and development of employee involvement programs; similar models have been developed under the titles of employee councils and committees.

One simple concept is driving the development of employee involvement programs: successful corporate community involvement utilizes all possible company resources to engage and serve communities. Companies can serve communities by creating employment and economic opportunities, giving in-kind and financial resources through sponsorships and grants, and connecting employees with the community

Exhibit C: Percentage of Companies with Varying Employee Involvement Program Components



Source: The Center for Corporate Citizenship at Boston College, "Community Involvement Index 2003."

through employee volunteer opportunities, loaned executives, and service on nonprofit boards. The more a company can leverage its resources in a way that aligns business goals with community interests, and the interests and skills of the employees, the better the company will be able to maximize its resources for the benefit of both the community and the business.

While money and in-kind resources remain a vital component of community involvement programs, there is a substantial increase in the number and variety of employee involvement programs.³ A 2002 survey of one hundred companies by Charities @ Work and The Consulting Network reported that 77% of companies identified employee involvement programs as a high priority or a growing interest.⁴ Reflecting the diversity in volunteer capacity (time, money and interest), employee involvement programs include a range of aspects including Days of Caring, release time for volunteering, in-kind donations and/or grants to organizations where employees volunteer, loaned executives, walk-a-thons, retiree events, placement of employees on nonprofit boards, and more.

The three most common types of programs include cash grants to organizations for which employees volunteer, such as Dollars for Doers and matching gifts programs; intranet links or information databases on community-based nonprofits; and placement of executives and

employees on local nonprofit boards (see Exhibit C). Today, 90% of the surveyed companies have at least one employee involvement component, such as employee giving, volunteer, or matching gifts. Furthermore, 57% offer all three kinds of core employee involvement programs. (See Exhibit B).

Engaging senior management, as well as all levels of employees, provides opportunities to interact with one another and to act as "ambassadors" in building relationships with the community.

Employee involvement programs have also grown in structure. In a 2001 survey of companies about employee involvement program structures, 47% utilized hybrid programs (such as volunteer councils/committees), 29% maintained company-directed programs, and 15% of companies had employee-driven programs. Furthermore, the number of hybrid programs is increasing; the survey found that 33% of companies with company-directed programs planned to convert them to hybrid programs by 2002.

It is also important to note that programs are becoming more global; the same survey found that 72% of companies that maintained corporate volunteer programs in the U.S. also had volunteer programs at their international locations.⁵

80% of companies directly connect employee involvement to their overall business strategies (a 167% increase from a 1992 survey).

—Points of Light Foundation report

Exhibit D: Relevant Business Issues Volunteer Programs Need to Address



Source: Points of Light Foundation, 1999.

Leveraging Employee Skills and Talent is Good Business

Companies have realized that employee involvement (EI) programs benefit not only their employees and communities, but also their businesses. By leveraging their employees along with other resources, companies can further distinguish their brands and broaden their corporate community involvement portfolio. In fact, some companies have "branded" social causes, such as Avon and its association with breast cancer organizations and activities. Others have established strategic partnerships with specific organizations whose activities are directly tied to the companies' business objectives, such as Home Depot with Kaboom to build playgrounds in underprivileged neighborhoods.

The benefits to the business and community are a direct result of the increased energy and commitment from the employees. When employees feel the company is responsive to employee concerns and utilize the resources of the company effectively, their desire to participate and contribute increases substantially.

According to the Points of Light Foundation, American-owned businesses are increasingly committing resources and attention to their EI programs and aligning the programs with their business goals and strategies. Findings from several studies include the following:

- 80% of companies incorporate EI into their overall business strategies, a 167% increase from only 30% in 1992.
- 81% of companies base their employee programs on core business functions, an increase from 31% in 1992.
- 52% of companies stress a commitment to community service in their corporate mission statements.
- 48% of companies incorporate volunteer programs into their overall business plans, up from 19% in 1992.

Corporations can leverage corporate community involvement programs to complement core business strategies, especially their EI efforts, in the following ways:⁶

Public Relations

- Increase visibility within the community.
- Improve relations with surrounding community.
- Improve public image.
- Provide a basis for cause-related marketing.

Marketing and Communications

- Reinforce the company's commitment to worthwhile causes and to its community.
- Develop good relations with community leaders.
- Improve understanding of the community and the company's customers.
- Help establish and enhance corporate or brand reputation in new or existing markets.
- Offer new lines of communication with the community.

Human Resources

- Develop employees, improve recruitment and retention, and increase diversity and teamwork.

- Enhance employee job skills, including leadership and public speaking.
- Improve interactions among employees that strengthen morale, build team spirit, and increase productivity to build cohesive, motivated workforces.
- Increase opportunities for employees to interact across business units as well as within diverse communities.
- Reduce absenteeism.

Corporate Community Involvement

- Broaden the company's portfolio of community involvement activities.
- Add a potential source of information for corporate philanthropy and community relations programs.
- Diversify portfolio of opportunities for employee and community engagement.

In addition to the benefits outlined above for the business, employees and the community also benefit from a focused, integrated EI program:⁷

Employee Benefits

- Increase opportunities for employees to explore and develop new areas of expertise.
- Reduce isolation and increase interaction with employees in other segments and levels of the company.
- Reduce isolation of employees from the community.
- Add variety and fulfillment and increase sense of self-worth.
- Improve the community services employees and their families use
- Increase and provide opportunities for more family interaction and activity time.

Community Benefits

- Support quality of life and help maintain healthy communities.
- Alleviate or eliminate community problems or deficiencies that detract from the well-being of the community.
- Provide new talent and energy by increasing the number of volunteers and the pool of available skills (especially managerial and technical) to nonprofits.
- Increase understanding between businesses and the nonprofit sector.
- Provide community services that otherwise might not exist.

Despite these benefits, a majority of companies are not engaging their employees beyond traditional EI programs, such as volunteer activities and fundraising campaigns (workplace giving campaigns, walks, and raffles). To assist companies interested in maximizing the impact of their employee involvement programs in their communities and businesses, the next three sections will provide guidelines, best practices, and examples of innovative EI practices. ■

Employee Involvement Guidelines

To maximize the impact of employee involvement programs, companies should first assess their current programs.⁸ The Center for Corporate Citizenship at Boston College has identified three typical stages of employee involvement that most companies experience:⁹

Stage One: Basic Employee Involvement

- Employees volunteer primarily on their own time.
- The company sponsors "one-off" projects.
- The initiatives build employee morale but provide minimal business benefits.
- The activities change every year based on which groups approach the company for its support.
- The company does not formally organize or track volunteer efforts or their impact on the company.

Stage Two: Strategic Employee Involvement

- The company assesses employee interests, company needs, and community needs.
- A strategic plan guides employee involvement by aligning company needs and employee interests with the community program or need.
- Broad internal "buy-in" for employee involvement exists within the company.
- The company provides incentives for employees to participate, including matching contributions or paid time-off to work in the community.
- Two-way communication concerning employee involvement between the business and employees and between the business and the community exist.
- Community commitments are disclosed and promoted throughout the marketplace.
- The company partners with a reputable non-profit organization whose strategic interests match those of the company and that has experience coordinating corporate projects.

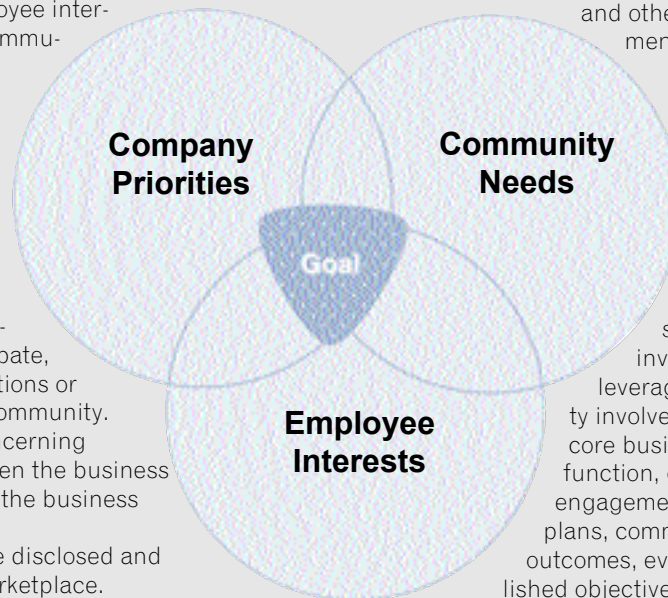
Stage Three: Integrated Employee Involvement

- The company establishes long-term partnerships with non-government organizations.
- Senior management and all company members actively support and engage in initiatives.
- The company measures and assesses employee involvement initiatives.
- The company takes a global view in defining "community," recognizing that community extends to all stakeholders who affect a company.
- The company does not distinguish between "socially responsible" and "business" frameworks because it believes all activities add value to the community and business.

After assessing their programs, companies should adjust their employee involvement programs based on company priorities, employee interests, and community needs, and make the intersection of the three areas the goal.¹⁰

Company Priorities:

Senior management should acknowledge the importance of employee involvement programs in achieving business goals by making the programs one of its top priorities and integrating them into corporate community involvement activities as well as other corporate activities (marketing, human resources, communications, etc.). Top management support is frequently cited as the most significant factor in developing a successful employee involvement program. In order for employee involvement programs to succeed, they must be supported at the highest corporate levels and be incorporated into the company's vision, mission, social policy statements, and other corporate community involvement efforts.



In particular, integrating social vision into the company's vision communicates that the company values civic engagement and considers volunteer work and community service essential components of business operations. To demonstrate integration, employee involvement programs should be leveraged in other corporate community involvement programs and treated as a core business function. Like any business function, corporate-sponsored civic engagement programs require business plans, communication plans, measurable outcomes, evaluation procedures, and established objectives and policies.

Employee Interests:

Companies should establish, support, and promote employee involvement programs that reflect employee interests and encourage employee participation. To encourage employee participation, companies should offer options that reflect their employees' interests. Employee interests can be gauged by surveys and other feedback mechanisms. Employee involvement programs should be assessed and adapted to reflect the changing interests of employees.

Community Needs:

To maximize impact, companies should focus their efforts on the most pressing community issues, and align employees' interests and skills to address those issues. Community needs assessments, employee surveys, and discussions with key community leaders can help identify critical areas in which employee volunteers and other corporate resources may be utilized. Issues should also be re-evaluated periodically. ■



Employee Involvement: Best Practices

To effectively target the "goal," Employee Involvement programs should incorporate the following seven best practices, as alluded to in previous sections:¹¹

1. Clearly define the strategy and purpose, align with the corporate mission and values, and integrate into other corporate community involvement programs

Success of any employee involvement program relies on a clearly defined strategy and purpose in order to share a unified message and to measure results. According to a Points of Light Foundation study, 69% of the larger companies surveyed have business plans in place for their employee volunteer programs that contribute to business goals.¹² Furthermore, a successful program aligns its mission with that of its company, and leverages the company's other community involvement activities, such as product donations, corporate grants and contributions, board placement of employees, etc., to maximize its own impact.

"Giving back is one of eight core values of the company," says Suzanne Apple, Home Depot's Vice President of Community Affairs. Volunteer activities should help a company meet its business objectives and should relate to, or reinforce, its brand identity. Home Depot's Team Depot, teams of Home Depot associates, gave seven million employee hours in 2002 to support community programs that are also funded by its foundation.¹³ For example, Home Depot's employees, grants, and product donations have helped people become homeowners through a partnership with Habitat for Humanity and to live in safer homes from a partnership with Rebuilding Together and Christmas in April.

2. Allocate proper resources

Companies must budget sufficient resources so that employee involvement programs achieve their goals and objectives. Employee involvement budgets should consider dedicated staff; employee release time and/or paid time for volunteer activities; measurement and evaluation

procedures; employee recognition; consultants; and communication to both internal and external audiences.

The amount of money that companies allocate to volunteer initiatives ranges from \$1.00 to \$10.00 per employee regardless of the number of employees who volunteer. On average, companies budget \$4.90 per employee.¹⁴

A key investment for employee involvement programs is dedicated staff, but the number of staff depends on a program's size and scope of activities. According to an LBG Associates survey, at a minimum, most companies with employee involvement programs maintain one full-time professional staff member at the corporate level to coordinate volunteer activities.¹⁵

Paid leave is another way companies allow employees to participate in employee involvement programs. A growing number of companies have begun offering employees paid volunteer leave. Currently, it is estimated that 22% of companies have adopted this growing best practice approach, the results of which have been a significant increase in the level of employee participation.¹⁶ For example, Wachovia's Time Away From Work for Community Service policy enables Wachovia employees to take four hours of paid time each month—or six days each year—to volunteer in their community. In the case of Home Depot, each store has a designated Team Depot representative who is responsible for organizing volunteer activities and serves as the community liaison for the store. The representative is allowed two hours per week "on the clock" to fulfill these responsibilities.

3. Establish an appropriate structure, set of guidelines and policies

Formal structure and policies are necessary for establishing the scope and parameters within which employee involvement programs operate and are organized. To ensure connection to the business, employee involvement programs should be in a department that has access and reporting lines to other key departments, such as communications, marketing, human resources, etc. The LBG Associates survey found that 87% of companies house their volunteer programs in corporate departments, and



13% of companies house their programs in foundations.¹⁷ According to other research, managers spend an average of 20% of their time managing the corporate volunteer program, and are often attached to the community relations, communications, public relations or human resource departments of their companies.¹⁸ Among the management structures commonly employed are 1) one staff person who coordinates all activity; 2) a staff person who works with a decision-making team of employees who plan and manage all activities; or 3) an outside consultant who develops and manages the program.¹⁹

Companies need to choose a structure which best fits their organizations and business cultures.

Furthermore, successful structures include employees in some part of the decision-making process. Some companies rely on employee-staffed committees to advise the employee involvement programs' structures, policies, and activities. For example, the Altria Employee Fund Grantmaking Committee, the Steering Committee at Walt Disney Company, and the Advisory Committees at Weyerhaeuser are examples of committees that advise employee involvement programs. These committees play many roles, including acting as champions for their employee involvement programs, representing the interests of fellow employees, identifying opportunities for employee involvement, evaluating completed projects, and communicating their employee involvement programs' results to other employees.

The guidelines and policies should define at least the following:²⁰

- Which employees are eligible to participate
- Which organizations/services/activities will be supported by the company and employees
- Which organizations will employees be allowed to work with or donate to
- When employees can participate and for how long.

"Corporate Volunteerism - Essential Tools for Excellence in Corporate Community Involvement" by The Center for Corporate Citizenship at Boston College provides a good

example of an employee volunteer policy.²¹ (See page 5).

4. Identify employee interests and skills and align with company goals and community needs

Successful employee involvement programs recognize and align the interests and skills of company employees with company goals and community needs. In order to do so, employees first need a mechanism through which their interests and skills are communicated to the company. A common method of culling information from a broad range of employees is employee surveys. For instance, employees from the Altria family of companies determine which community issues they find most important, and the top issues then become the Altria Employee Fund's focus areas for funding.

Another example of a company that aligned employee interests and skills with its goals and its community's needs is Microsoft. In 2000, Microsoft partnered with NPower to build a network of thirteen independent, locally based nonprofit technology assistance providers who would meet the mounting technology needs in communities across the country.²² In 2003, TCC Group assisted Microsoft in evaluating the impact of NPower. In its evaluation, TCC Group identified the enthusiastic participation of Microsoft employees in NPower as one of the key benefits and reasons for success of this corporate, non-profit relationship. By aligning employee interests and skills with its goals and community needs, Microsoft helped make NPower a success.

5. Integrate marketing and communications

Employee involvement programs allow employees to make visible contributions to their communities, which often enhance their companies' reputations. Companies can further highlight those programs in their internal and external outreach efforts, especially through their marketing, communications, and public relations departments.²³ The Points of Light Foundation study revealed that 64% of companies use employee volunteer programs in their marketing and communications strategies, and 83% use employee involvement programs in their public relations activities.²⁴

However, a 1998 survey on managing volunteers found that only 26% of employees were aware of employer sponsorship of community service projects.²⁵ Employers involved in volunteer efforts need to consistently and conscientiously communicate employee volunteer opportunities to their employees so that the employees can act upon them. Communication should include information on the various volunteer opportunities, guidelines, upcoming events and activities (i.e., who, what, where, when, and how) as well as highlights of employees' achievements and the success of past initiatives.

Mechanisms to communicate employee involvement activities to both internal and external stakeholders include:²⁶

- Employee publications
- News releases
- Fact sheets
- Annual reports
- E-mail
- Bulletin boards/internal postings
- Corporate citizenship reports
- Internal and external websites
- Retail display
- Speeches and presentations by the CEO and senior management
- Employee orientation programs.

6. Recognize employees' efforts

Companies with successful employee involvement programs recognize their employees' efforts. The LBG Associates survey found that 92% of companies recognized employee effort.²⁷ By doing so, companies ensure the continued participation of employees in employee involvement programs and the continued success of their employee involvement programs.

Recognition includes showcasing volunteers in company publications (85%), providing awards and certificates (78%), hosting volunteer recognition events (71%), and sending letters of commendation to volunteers (64%).²⁸ Other ways to acknowledge employees' time and efforts include the following: plaques, gifts (pins, t-shirts, mugs, etc.), coupons, write-ups on company website, or letters from the CEO.

Founded in 1928, General Electric's volunteer organization, the Elfun Society, now has over 52,000 members including retirees, and operates 138 chapters in 33 countries. Demonstrating Best Practice #6, the Society presents awards each year at the chapter, area, and global level to a "New Elfun of the Year," "Regular Elfun of the Year," "Senior Elfun of the Year," and "Elfun Team of the Year." Various chapter awards are also given annually. In addition, every two years the Company runs the Phillippe Awards Program, named after former GE CEO Gerald Phillippe, to recognize GE employees for their outstanding community efforts.²⁹

In addition to traditional ways of recognizing employee involvement, companies should consider innovative means by which to acknowledge employees such as:³⁰

- Host employee appreciation days/events to recognize employee volunteer, public service, and charitable efforts
- Organize breakfasts, luncheons and/or dinners for outstanding employees hosted by the CEO
- Implement a prize-based program that awards employees based on the number of hours they volunteer or serve
- Establish employee volunteer and citizen of the month/year awards, including the presentation of cash awards and/or plaques to recipients and/or their organizations.

An excellent example of a "reward" program is "Dollars for Doers," a national contribution program that donates cash grants to qualified non-profit organizations to reward an employee for his or her efforts in the community whether or not they are made on behalf of the company. The purpose of the Dollars for Doers program is to act as an alternative to the matching gifts program for employees who can donate time but not money, and to motivate employees to participate in volunteer events and activities. Bank of America's Volunteer Grants program awards a \$250 grant for every 50 hours of volunteer time in a calendar year per associate and a \$500 grant for every 100 hours of volunteer time per associate. In 2001, Bank of America distributed \$145,000 in Volunteer Grants.

7. Measure and evaluate

Similar to corporate philanthropy, the contributions of employee volunteering have long been undervalued because no ready formula or standard mechanism to measure and value contributions of volunteers exists.³¹ Measurement and evaluation are vital because they allow an employee involvement program to determine its true level of impact on the community, employees, and the business. In addition, it is essential to solicit employee feedback, both criticisms and recommendations, on past and future initiatives in order to provide insights into how to continuously improve.

By comparing the results of employee involvement programs to pre-determined goals and objectives, companies can assess the success of their programs as well as review and revise their goals and objectives each year based on the evaluation of the previous year's initiatives. Furthermore, the data gathered from the assessment can be used to generate significant support and buy-in from upper management as well as build the company's brand through external communication efforts. The Points of Light Foundation survey found that programs succeed long-term when identifiable outcomes can be explicitly aligned with the interests of all stakeholders- nonprofits, employees, communities, and companies (as noted in Best Practice #4).³²

Some 70% of companies surveyed now conduct some level of internal and external assessments to measure the impact of volunteering. A growing trend related to data collection involves companies collecting data on more variables than only the number of volunteers and hours volunteered to measure the impact of volunteering on employee morale and team building. The Points of Light survey found that 26% of companies gather data to determine employee morale, and 25% to assess team building. Furthermore, 6% of companies sought to measure the effect of volunteering on employee turnover/absenteeism.³³

Measurement and evaluation incorporates both informal (i.e., anecdotal stories) and formal tools and techniques (i.e., focus groups, surveys, questionnaires, tracking software, external consultants, etc.). The following are some popular mechanisms for feedback:³⁴ e-mail (63%); surveys (62%); post-event evaluation forms (44%); testimonials (35%).

Best Practices at Work: Altria Group, Inc.

The structures of the various Employee Funds of the Altria family of companies mirror the aforementioned best practices for employee involvement. By thoughtfully and comprehensively engaging employees in grantmaking, Altria Group has established a successful employee involvement program whereby employee interests are aligned with community needs.

1. Clearly define the strategy and purpose, align with the corporate mission and values, and integrate into other corporate community involvement programs

The creation of the Employee Funds at the Altria family of companies was driven by strategy and purpose, and reflects one of their seven shared attributes with its operating companies, "commitment to responsibility." With a readiness to engage with communities responsibly and to behave as good corporate citizens, Altria Group designed its own employee fund with the assistance of TCC Group. The goals were to increase the company's connection to its communities, increase employee participation, reinvigorate employee giving, and respond to employees' desire to become more personally involved in community projects. In 1996, the company formed the Philip Morris Employee Fund (PMEF) now the Altria Employee Fund, (AEF), a 501(c)(3) public charity. In subsequent years, Altria introduced the Fund to two of its operating companies, Kraft Foods and Philip Morris USA, resulting in the Kraft Employee Fund (KEF) in Chicago and the Philip Morris Employee Community Fund (PMECF) serving Cabarrus, North Carolina and Richmond, Virginia. In 2004, Kraft Foods introduced the Kraft Employee Fund New Jersey (KEF NJ) for the new Kraft employees in New Jersey. Each of these funds is a separate 501(c)(3) public charity.

While each of the Employee Funds has adopted a mission unique to employees' interests, local company resources, and local community needs, all of the funds ultimately seek to complement the company's contributions programs, reinforcing the company's position and social impact in the community. As each Employee Fund was





established, research was conducted to determine the community needs of each key corporate location. Typically revisited annually, this research is critical in identifying grantmaking focus areas for the employee survey of each Employee Fund.

For example, when the Kraft Employee Fund (KEF) conducted a needs assessment in 2002 for its communities, data suggested that over-eating and unhealthy eating as well as increased lack of supervision of youth during after school hours was on the rise and negatively impacting the quality of life of many families. KEF launched a new focus area of Healthy Lifestyles to support after-school programming that included a health and physical activity component. Simultaneously, Kraft Corporate Contributions sought to engage pro-actively in understanding and impacting the obesity epidemic in the nation.

Leveraging internal resources is critical to the success of the Employee Funds. The Funds often complement other Altria family of companies' efforts in the community, including some grantees being chosen as project sites for employee volunteer "Cares Days." Perhaps the most valuable internal resource has been building on the workplace giving campaigns that occur annually at each company location. All dollars raised at the campaign are invested by the Employee Fund Grantmaking Committee.

2. Allocate proper resources

Each of the Employee Funds has employees dedicated to the planning and implementation of employee involvement programs. The number and level of staff is determined by the scope of each Fund (the number of grantmaking cycles, the number of employee council members, the number of proposals received, the amount of awards made, etc.), but in general, the number ranges from one to three employees. For example, the AEF receives TCC Group's continued consulting support in addition to full-time and part-time staff in its employee involvement programs. In addition, resources were committed to employee committee orientation and training, employee release time, program implementation, and employee recognition. Furthermore, a number of these and other tasks are outsourced

to consultants who provide expertise and assistance in grantmaking practices and procedures (orientation and training of committee members, Request For Proposal processes, financial review of applicant organizations, objective facilitation of proposal review, and grant decision-making). All of these resources are paid directly by the company, allowing all dollars raised for the Employee Funds to go directly to charities at work in the community.

3. Establish appropriate structure, guidelines and policies

As the Employee Funds continue to mature, they are evolving to include stronger structures and policies each year. A Fund is typically housed in the Corporate Contributions department so as to leverage and integrate other resources and activities, such as other employee involvement programs (volunteer opportunities, etc.). The Fund structure is such that two chair persons lead their peers on the employee committee. The committees are structured to represent the diversity of each company's departments and locations.

Clear guidelines and policies increase the effectiveness of the Employee Funds. The Committee has an orientation and a formal training manual that outlines the expectations (work and time) and policies of the Fund. In addition, the guidelines for applicants are clearly described, especially as related to applicant criteria, funding restrictions, the focus areas and reporting requirements. Applicant information is available in Fund materials, such as the website and mailers. These guidelines are revisited annually, and the application process has been altered based on feedback from applicants.

4. Identify employee interests and skills and align with company goals and community needs

The Altria Employee Fund was created out of the desire of employees to be more involved in their communities. Through an annual survey, employees select the community areas of interest. The employees' top focus areas (four to six, depending on the Fund) are researched to determine the specific needs in the community that are reflected in the guidelines of the RFP. The five-year AEF evaluation conducted in 2001 found that "staff, employees, observers and



committee members agree that the focus areas have been reflective of employee interests and community need." In addition, the evaluation noted that "a large part of Ambassadors & Committee members agree that [AEF's] goals are clear and that it represents the interests of employees of the Altria family of companies."

The Funds demonstrate a way to bring together employees with a common passion for serving their communities' needs by leveraging their company's resources. Employees must apply for volunteer service on the Employee Fund Committee and, in so doing, demonstrate a level of commitment to and interest in grantmaking and values.

5. Integrate marketing and communications

The Employee Funds help build internal and external relationships. Internally, the Funds' activities help increase workplace campaign participation and dollars, recruit volunteers and new committee members, and highlight employee volunteering. Externally, the Funds demonstrate the employees' interests and care for their communities. Information about the Funds is shared with the communities primarily through an annual report, information on the employee involvement website, and at an annual reception for grantees. Beyond their role in reviewing proposals and making decisions about grant awards, committee members also serve as representatives of the Fund, both internally and externally.

6. Recognize employee involvement

Throughout the Employee Fund process, employees are recognized for their dedication. They are acknowledged at meetings (orientations, trainings, check presentations, etc.), noted in the Fund's annual report, and invited to a post-process dinner party. Furthermore, committee members are informally recognized by their peers who thank committee members for their work and by nonprofits in thank you letters and in grant reports.

7. Measure and evaluate

In 2001, after five years of experience, AEF undertook a retrospective look at its accomplishments to learn how it could improve going forward. AEF retained TCC Group to conduct a

review of AEF's impact on Altria Group and the community as well as to assess its processes. The results reaffirmed Altria Group's commitment to the AEF as key findings demonstrated positive results for both Altria Group and its employees:

- Higher employee morale (a source of tremendous pride in the workplace)
- Increased participation and average financial contribution of employees
- Improved quality of and access to programs and services for community members.

Some of the Funds have implemented other evaluation mechanisms, such as surveys, after each major Fund activity (orientation, training, grantmaking days, etc.) to continue to improve the process.

Furthermore, grantee organizations are required to complete interim and/or final reports. From these reports, the Funds are able to determine the impact of their funding.

Overall, the Funds recognize the value of evaluation as a means for improving administrative processes, for keeping community information current, for adding value to the professional development of committee members as they review proposals and make corporate giving decisions, and for future planning and enhancement of the Funds.

A review of Altria Group's Employee Fund resulted in the following key findings:

- *Higher employee morale (a source of tremendous pride in the workplace)*
- *Increased participation and average financial contribution of employees*
- *Improved quality of and access to programs and services for community members.*

Cutting Edge: Innovative Employee Involvement Practices

A growing number of companies are developing innovative employee involvement programs that more closely align program goals with company goals and involve employees on a deeper level. The following examples offer new and creative approaches to employee involvement.

Extended Leave: Xerox and Pfizer

Some employers grant "social leave" or an "extended leave" to select employees, giving those employees the opportunity to work full time on a special project with a nonprofit organization for a specific period of time. At the end of the "leave," employers' and employees' jobs are waiting for those employees. While only a handful of companies currently allow employees to take sabbaticals (about 5%), in the past two years, the number of companies that allow employees to go on sabbatical has increased, especially during this time of corporate downsizing.³⁵ To be eligible, employees must demonstrate a history of sustained commitment to the organizations or projects in which the employees plan to participate. According to the companies, employees return from social leave with new ideas, increased energy, and greater appreciation for the leave policy and the companies.³⁶

In 2004, nine **Xerox** employees were granted three to twelve-month fully paid sabbaticals to devote themselves to diverse community causes. The sabbaticals are part of The Xerox Foundation's long-standing Social Service Leave program, which has granted sabbaticals of up to one year to 453 employees since the program began in 1971. "These employees have a special opportunity to make an impact in the communities where they live and work, and we deeply respect and value their personal dedication to these worthy causes. It's an inspiration to all of us," said Anne M. Mulcahy, Xerox chairman and chief executive officer, "Social Service Leave embodies Xerox's commitment to corporate citizenship and our belief that companies have a moral obligation to give back to and invest in their communities."³⁷

Social Service Leave was conceived by former Xerox president Archie McCardell in 1970. He and another Xerox executive were on a flight from California, where they had made a donation to a

university on behalf of Xerox. A conversation about how "easy" it was to give money turned into a discussion about what kind of philanthropic gesture would represent a genuine sacrifice for Xerox. They concluded that the company's most valuable asset was its employees, and that offering employees' time would demonstrate a true philanthropic commitment by the company. Then-CEO C. Peter McColough said in a letter to employees announcing the program in 1971: "Each year we contribute several million dollars to worthwhile institutions and projects. Yet we don't think that's enough ... so we decided to offer what we can least afford to give: the full-time service of Xerox people."³⁸

Through the **Pfizer** Global Health Fellows, Pfizer sent eighteen employees for up to six months to support non-governmental organizations (NGOs) fighting HIV/AIDS in developing countries in 2003, while complementing and strengthening the impact of Pfizer's existing grant and product access programs. Pfizer physicians, nurses, epidemiologists, laboratory technicians, health educators, and IT specialists from the United States, Europe, Latin America, Australia, and Africa have been loaned to non-governmental organizations (NGOs) working to fight HIV/AIDS and other diseases in locations such as Kenya, Honduras, Uganda, and Vietnam. Pfizer Global Health Fellows play vital roles in helping reduce mother/child HIV transmission, improving workplace HIV/AIDS awareness, and providing prevention education for high-risk youth. The specific needs and positions are identified by Pfizer's NGO partners.

"Pfizer's commitment to increasing access to health and healthcare starts with our industry's commitment to research and extends through some of the most innovative donation programs ever launched," said Hank McKinnell, Pfizer Inc.'s chairman and chief executive officer, "We are now taking our commitment to a new level by sharing the skills and knowledge of the colleagues who play such a vital role in our success."

Global Health Fellows are selected in part for their desire to make a difference in the world, their strength in teaching and training, and their willingness to see their work carried on by local teams. Pfizer has committed to fund transportation, lodging, and other expenses for the Fellows, while maintaining the Fellows' positions within the company.³⁹

Corporate Teams: Bank of America and Merck

Companies such as Bank of America and Merck have created corporate teams that allow them to partner with various nonprofit organizations to maximize the companies' nonprofit efforts.

The Team **Bank of America** Volunteer Network is a grass-roots initiative run by volunteers in local markets. A volunteer associate coordinates community events and projects for local employees. The national office for Team Bank of America supports the associates, but the volunteer activities are often sponsored locally as well. Team Bank of America Volunteer Network donates more than 650,000 hours a year. Team Bank of America volunteer opportunities include tutoring students in public schools, restoring homes for senior citizens, sponsoring AIDS fundraisers, and cleaning up coastlines.⁴⁰

Through the Pro Bono Legal Program, **Merck** lawyers and support staff provide free legal services to the poor. Seven volunteer attorneys from Merck's Patent Department started this program by working with Union County Legal Services in 1994. Today, the program partners with Legal Services of New Jersey (LSNJ), including more than fifty participating Merck attorneys, and has pro bono teams in four Merck facilities. Every year, Merck attorneys accept a number of cases related to family, financial, and Social Security matters. The attorneys also provide advice to walk-in clients in New Jersey and Pennsylvania. LSNJ provides training and ongoing support for the volunteer attorneys in specific areas of law.⁴¹

Customer Partnerships: Starbucks and Timberland

In 2000, **Starbucks** created Make Your Mark, a program that matches its employees' volunteer hours with cash contributions to designated nonprofits—\$10.00 for every hour, up to \$1,000. In addition, the match is available to customers that participate in the organized volunteer events. Since the Make Your Mark program started in January 2000, Starbucks employees and customers have volunteered 250,000 hours, generating more than \$1.2 million for local charities.⁴²

In partnership with VolunteerMatch, **Timberland** allows its website viewers access to a user-friendly volunteer database with over 30,000 opportunities so that viewers can find out how they can get involved locally. While Timberland does not sponsor or endorse organizations in the VolunteerMatch network, it provides links to various organizations to encourage volunteerism and community service.⁴³

Leveraging Technology: Bank of America, Booz Allen Hamilton, and Citigroup

AngelPoints allows **Bank of America** to track its employees' volunteer activities and to leverage the information for the bank's CRA credits.⁴⁴ The Web-based AngelPoints system records, quantifies, and uploads all of Bank of America's community programs into a CRA file. Through a central site, employees can enter their volunteer hours and employers can manage and report the institution's cumulative activities. An optional CRA module presents a questionnaire that determines, among other things, whether or not a particular service qualifies for CRA credit.

Booz Allen Hamilton utilizes PledgeFirst, an online workplace giving campaign solution provided by America's Charities. Through PledgeFirst, companies can have fully customized campaigns online, including electronic pledge forms for payroll deduction giving, as the employees access charity descriptions through links from PledgeFirst.⁴⁵ In addition, the technology allows reports in real time (administrators can see the progress of contributions, participation, most-selected charities, and other up-to-the-second campaign data); employees can learn about upcoming events and programs; and the company has full control of the content of its PledgeFirst site. "Technology offers a tremendous advantage when used to support workplace philanthropy. Employees demand choice and prefer access to a portal to where they can become more informed donors and pledge online," said Steve Delfin, Director of Community Relations at Booz Allen Hamilton.⁴⁶

Citigroup utilizes technology to streamline its Matching Gift Program and Volunteer Incentive Program. The Matching Gift Program encourages employees to give financial aid to qualified organizations of their choice and the company demonstrates its support by "matching" the amount, up to \$1000 per year, for qualified organizations. The Citigroup Volunteer Incentive program recognizes employees who devote their personal time to community service by giving a financial gift to the nonprofit organizations for which the employees volunteer. With more than 250,000 employees and gifts totaling over \$2 million, Citigroup manages these programs through easymatch.com, which provides an online site for information on each program, answers to frequently asked questions, guidelines, downloadable forms, and registered employees' giving histories.⁴⁷

A Final Word

TCC Group's work with corporations continues to focus on one key issue: how to build Corporate Community Involvement programs that have a major impact on society and the business. When we ask senior management what the most beneficial impact could be for the business, the answer is invariably the same—recruiting and retaining talented employees.

Companies are interested in building a program that engages the employees, aligns with the values of the company, and makes the employees proud to be associated with the company. This briefing paper has provided the information, examples and guidelines that can be used to build an effective employee engagement program, ultimately resulting in major benefits to the company and society.

We hope you found this paper useful, and we welcome your thoughts and ideas about innovative programs that go beyond what has been presented here. ■

Endnotes

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- 2 - At the time of the evaluation, it was called the Philip Morris Employee Fund or PMEF.
- 3 - David Logan, ed., *Employees in the Community - A Global Force for Good*, (London: The Corporate Citizenship Company and New York: Center for the Study of Philanthropy, CUNY, 2002).
- 4 - The Consulting Network, "Employee Involvement Growing in Companies throughout the U.S.," 2003.
- 5 - The Consulting Network, "Trends and Practices in Corporate Employee Involvement," 2002. Note: Presentation of survey commissioned by Charities @ Work™ and conducted by The Consulting Network.
- 6 - The Points of Light Foundation, *The Corporate Volunteer Program as a Strategic Resource: The Link Grows Stronger*, Executive Summary (Washington, D.C.: The Points of Light Foundation) http://www.pointsoflight.org/pdfs/grows_stronger.pdf, February 2004, and The Center for Corporate Citizenship at Boston College, "Corporate Volunteerism - Essential Tools for Excellence in Corporate Community Involvement," <http://www.bc.edu/centers/ccc/Media/volunteerism.pdf>, February 2004.
- 7 - The Center for Corporate Citizenship at Boston College's "Corporate Volunteerism - Essential Tools for Excellence in Corporate Community Involvement," <http://www.bc.edu/centers/ccc/Media/volunteerism.pdf>, February 2004.
- 8 - For guidance on how to develop a program, refer to the paper by The Center for Corporate Citizenship at Boston College, "Corporate Volunteerism - Essential Tools for Excellence in Corporate Community Involvement," <http://www.bc.edu/centers/ccc/Media/volunteerism.pdf>, February 2004.
- 9 - The Center for Corporate Citizenship at Boston College, "Employee Involvement in Focus," http://www.bc.edu/centers/ccc/Media/InFocus_Emplnv.pdf, February 2004.
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- 11 - As identified by Points of Light Foundation and the USA Freedom Corps and expanded upon by TCC Group. Sue Vineyard, ed., *Best Practices in Employee Volunteer Programs*, (Washington DC: Points of Light Foundation, 1997); the USA Freedom Corps, http://www.usafreedomcorps.gov/for_organizations/businesses/actively_engaging_employees, February 2004.
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- 13 - Team Depot website, http://www.homedepot.com/HDUS/EN_US/corporate/corp_respon/corp_respon.shtml, February 2004.
- 14 - LBG Associates, "Corporate Volunteerism: Innovative Practices for the 21st Century," (2001, http://www.lbg-associates.com/Publications%20%26%20Reports/publications_and_reports.html, February 2004.
- 15 - Ibid.
- 16 - USA Freedom Corps, "Today's Best Practices," http://www.usafreedomcorps.gov/for_organizations/businesses/match_todays_best_practices/paid_leave_sabbaticals.asp, February 2004.
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- 18 - "Employee Volunteer Programs -- An Introduction" brochure was prepared by John P. Dessauer, Volunteer-in-Residence at Bloomington Volunteer Network. It is based on research conducted in 1998 by Jim Bergstrom, and on the following publications: *Corporate Volunteer Programs: Benefits to Business*, The Conference Board, 1993; *Best Practices in Workplace Employee Volunteer Programs*, Sue Vineyard, editor, The Points of Light Foundation, 1996; *Developing and Strengthening a Corporate Volunteer Council: Guidelines for Success, 2nd edition*, The Points of Light Foundation, 1993, <http://www.city.bloomington.in.us/volunteer/evp.html>, February 2004.
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- 36 - City of Bloomington, Employee Volunteer Programs - An Introduction, <http://www.city.bloomington.in.us/volunteer/evp.html>, February 2004.
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- 41 - Merck website, http://www.merck.com/about/cr/policies_performance/social/probono_legal.html, March 2004.
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- 44 - Angelpoints website, http://www.angelpoints.com/press/aba_11.9.03.pdf, March 2004.
- 45 - PledgeFirst website, <http://www.pledgefirst.com/>, March 2004.
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Corporate Citizenship Resources

Building Value: The Corporate Volunteer Program as a Strategic Resource for Business (Washington: Points of Light Foundation, 2001). This is the Points of Light Foundation's most-up-to-date resource book for managers of corporate volunteer programs, packed with strategies and examples from companies with guidance on how to take a successful volunteer program to the level of a strategic business resource.

Corporate Volunteerism (Boston: The Center for Corporate Citizenship at Boston College, 1999). This book on Corporate Volunteerism provides how-to's, facts and case studies to help community relations practitioners implement or improve employee volunteerism programs.

Employee Volunteering - The Guide (UK: The UK National Centre for Volunteering, 2001). Produced in conjunction with the International Year of the Volunteer 2001 in the United Kingdom, this summary booklet provides practical information and guidance on employee volunteering. A more comprehensive guide in book form will follow.

From the Top Down: The Executive's Role in Volunteer Program Success. Ellis, Susan J., (Energize, 1996). This book addresses the top decision maker's role in a volunteer program and examines the issues necessary to facilitate volunteer program success.

CECILE Network: A Complete Guide to Employee Community Involvement. Halley, David, (London: The Corporate Citizenship Company, 1999). This study from the Coordinating Employee Community Involvement Links Europe (CECILE) network of companies examines how companies support employee community involvement and the benefits that companies, employees and the community gain. It includes case studies.

Practices in Corporate Employee Involvement Programs. (Vienna, Virginia: The Consulting Network, 2002). This survey examines employee involvement programs at 100 companies.

Corporate Volunteer Program as a Strategic Resource - The Link Grows Stronger (Washington: Points of Light Foundation). Based on extensive research, this publication spotlights companies strategically integrating effective employee volunteer programs into their core business functions.

Corporate Volunteerism: Innovative Practices for the 21st Century (LBG Associates, 2001). This comprehensive report provides examples of success leading edge volunteer programs by major US companies.

Engaging Employees in the Community (Calgary, Canada: Imagine, Volunteer Canada and The Calgary Workplace Volunteer Council, 2002). In a step by step process, this workbook provides companies with a basic framework for promoting, developing, implementing, evaluating and sustaining an employer supported volunteer initiative.

Heroes after Hours: Extraordinary acts of Employee Volunteerism. Forward, David C., (Jossey-Bass, 1994). This book offers stories from employee volunteers and managers around the U.S. and describes why and how employees become involved and the benefits that accrue.

Employees in the Community: A Global Force for Good. Logan, David, (London: The Corporate Citizenship Company, 2002). This study takes a global approach to exploring how employee community involvement is valued and how its impact is measured. Case studies feature Zurich Financial Services, Danone Group, GE, IBM and Samsung.

Online Resources

[Business for Social Responsibility \(BSR\):](http://www.bsr.org)
www.bsr.org

[Business for Humanitarian Forum Association:](http://www.bforum.ch)
www.bforum.ch

[Business in the Community:](http://www.bitc.org.uk)
www.bitc.org.uk

[Business Partners for Development:](http://www.bpdweb.org)
www.bpdweb.org

[Business Roundtable:](http://www.brtable.org)
www.brtable.org

[Business Strengthening America:](http://www.bsannetwork.org)
www.bsannetwork.org

[Center for Corporate Citizenship:](http://www.uschamber.com/ccc)
www.uschamber.com/ccc

[Center for Corporate Citizenship at Boston College:](http://www.bc.edu/centers/ccc)
www.bc.edu/centers/ccc

[Center for Ethical Business Cultures:](http://www.cebcglobal.org) www.cebcglobal.org

[Charities@Work:](http://www.charitiesatwork.org)
www.charitiesatwork.org

[Cone, Inc.:](http://www.coneinc.com)
www.coneinc.com

[Conference Board:](http://www.conference-board.org)
www.conference-board.org

[International Business Leaders Forum:](http://www.iblf.org) www.iblf.org

[Points of Light Foundation and Volunteer Center National Network:](http://www.pointsoflight.org)
www.pointsoflight.org

[TCC Group:](http://www.tccgrp.com)
www.tccgrp.com

TCC Group

About TCC Group

For over two decades, TCC has provided strategic planning, program development, evaluation and management consulting services to non-profit organizations, foundations, corporate community involvement programs and government agencies. In this time, the firm has developed substantive knowledge and expertise in fields as diverse as community and economic development, human services, children and family issues, education, health care, the environment, and the arts.

From offices in Philadelphia and New York, and full-time staff in Chicago, the firm works with clients nationally and, increasingly, globally. Our services include strategic planning, organizational assessment and development, feasibility studies, program evaluation and development, board development, restructuring and repositioning, as well as grant program design, evaluation, and facilitation.

Corporate Challenges and Opportunities

The increasing pressure to be responsible corporate citizens affects almost all companies, regardless of the industry. But the types of pressure and the standards required of companies vary by industry, region, and stakeholder.

Traditionally, Corporate Community Involvement Programs (encompassing corporate contributions, philanthropy, and community relations programs) have been the public face of the corporation within the community. These programs continue to provide the resources and the relationships from which a company builds its corporate citizenship program. Recently however, the issues involved in building successful programs have become even more complex.

Companies have found that a strong Corporate Community Involvement strategy, integrated with the business, can help respond to internal and external demands and simultaneously create value for the business and the community. TCC Group can help a corporation build that strategy.

For nearly a quarter of a century, TCC Group has worked with leading corporations nationally and around the world to develop and implement Corporate Community Involvement Programs that respond to multiple stakeholder needs and have strong impacts on both the community and the business.

Corporate Community Involvement Services

- **Strategic Planning**
- **Development of Signature Programs**
- **Grants Management and Outsourcing**
- **Program Evaluation**
- **Program Design and Implementation**
- **Organizational Assessment**
- **Employee Involvement Development**
- **Research and Benchmarking**
- **Advice and Counsel**

How We Work

For each engagement, TCC Group assembles a team of consultants with experience in the areas needed for a project. Individuals are selected based on their backgrounds in evaluation, planning, employee involvement, program design, or grants management systems and structure, as well as experience with clients in the same industry.

Depending on the nature of the assignment, we can also draw on individuals with domestic and international experience in specific issue areas, such as education, health and human services, arts and culture, children, youth and families, hunger and nutrition, community development, and the environment.

Every assignment we undertake benefits from this team approach, which brings a broad range of expertise and backgrounds to the assignment. Because of the depth and breadth of this experience and our collective knowledge of corporate contributions and corporate social responsibility, TCC Group is strongly positioned to respond to each client's specific needs.

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