

Measuring Employee Volunteer Programs: The Human Resources Model



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ISBN #1-58534060-X



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The Human Resources Model

*A joint research project of the Points of Light Foundation
and the Center for Corporate Citizenship at Boston College*

Acknowledgements

This publication is the result of a joint research effort conducted by the Points of Light Foundation and the Center for Corporate Citizenship at Boston College.

About the Points of Light Foundation

The **Points of Light Foundation** is a nonprofit, nonpartisan organization dedicated to engaging more people and resources more effectively in volunteer service to help solve serious social problems. Through its programs and partnerships with over 360 Volunteer Centers across the country, the Points of Light Foundation supports activities focused on engaging the general public and specific population segments — including workplace, family, youth, seniors, and faith-based communities — in volunteer activities that effect real change. Learn more at www.PointsofLight.org.

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Special gratitude to David Warshaw, GE Elfun Employee Volunteer Program Manager (retired) and former National Council on Workplace Volunteerism Chair, for assistance and guidance in developing this publication.

About the Center for Corporate Citizenship at Boston College

The Center for Corporate Citizenship at Boston College, a membership-based research organization, is committed to helping business leverage its social, economic and human assets to ensure both its success and a more just and sustainable world. As a leading resource on corporate citizenship, The Center works with global corporations to help them define, plan and operationalize their corporate citizenship. The Center offers publications including a newsletter, research reports, and white papers; executive education, including a Certificate program; events that include an annual conference, roundtables and regional meetings, and a corporate membership program: www.bc.edu/corporatecitizenship.

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We also gratefully acknowledge the following corporate sponsors whose intellectual and financial support made this publication possible:



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Executive Summary

This report documents the findings from a joint research project conducted by the Center for Corporate Citizenship at Boston College (Center) and the Points of Light Foundation (Foundation), which was undertaken to examine the value-added benefits of employee volunteering. Research, consisting of a literature review and best practices inventory, reflects the continuing need for practical tools to measure business benefits from employee volunteering which led to the focus of the report: *Measuring Employee Volunteer Programs: The Human Resources Model*. Human resources (HR) was selected because of the perception that many companies are not taking advantage of the powerful synergies between HR functions and workplace volunteering. It is important to note that the conceptual framework presented as a tool to facilitate measurement is applicable to other core business goals in areas such as community relations, public affairs, and marketing.

From this practical perspective, interviews were conducted with HR and employee volunteer program (EVP) administrators from a cross-section of companies currently facilitating an EVP at different levels of sophistication. Results of the interviews indicate that an EVP is effective in developing employees, improving public perception of the company, and enhancing business operations. Further, administrators believe an EVP is a sensible, efficient method to achieve general HR objectives in such areas as recruiting, retaining, and developing employees. Four categories of employee skill building were identified through the interview synthesis: project management, leadership development, interpersonal relations, and self-management skills. Though an EVP's asset to the company is generally viewed positively, most of the administrators interviewed did not use tools to measure HR outcomes.

Five Critical Success Factors

This study identifies five critical success factors that are essential when creating and implementing an EVP measurement process:

- 1. Take a strategic approach.** Identify the key goals you are trying to deliver.
- 2. Build a conceptual framework for your program.** Design a measure that specifically addresses the desired outcome.
- 3. Take an inventory of existing metrics.** When possible, take advantage of existing measures used inside the company.
- 4. Find the metric gaps and modify as necessary.** Identify a measurement process for each goal.
- 5. Engage key stakeholders.** Involve staff who have management responsibility for achieving the business goals the EVP will support.

The Conceptual Framework

With the five critical success factors addressed, EVP managers can build, test, and implement a measurement program in three steps to compare EVP outcomes against predetermined goals.

- **Step 1. Identify the relationship between the EVP company goals, stakeholder needs, and potential outcomes of the EVP.**

This involves identifying the key business goals of the EVP and building the conceptual framework in collaboration with key stakeholders. Then, with this due diligence completed, identifying specific EVP outcomes linked to relevant business goals will provide the data needed to ensure continued EVP relevance.

- **Step 2. Define measurement questions and criteria.**

This includes selecting the questions that will determine whether or not the EVP is meeting its goals, determining what metrics would answer those questions, and developing consensus among key stakeholders to commit to these metrics.

- **Step 3. Implement the measurement process to test the conceptual framework, which helps assess whether current programs support goals.**

If existing programs do not lead to the desired effect, then managers must strongly consider modifying EVP goals or developing a new EVP altogether. In addition, EVP managers should look for evidence of effective EVP communications.

The importance of applying a *strategic approach* when designing, managing, and assessing an EVP cannot be overemphasized. Managers are encouraged to determine what the company hopes to achieve through an EVP and identify the measures that show success has been achieved. In addition, engaging key stakeholders in the measurement process, from the identification of data points to data collection methods, will foster buy-in and increase the relevance of the EVP for the company as a whole. The creation of an EVP measurement approach that factors in the company's broader goals will help support the case for continued EVP programming that meets the needs of the company, the employee, and the community.

Introduction to the Project

American businesses have long been committed to community service and they continue to galvanize their resources, partnering with colleagues and competitors alike to strengthen society. In December 2004, the tsunami disaster spurred spontaneous involvement from a multitude of private institutions such as Unilever in Sri Lanka, whose employees drove trucks to distribute relief supplies (Hymowitz, 2005). The private sector also attracts both government and non-profits as critical partners in providing resources to help reduce social problems and human needs. Business Strengthening America, a national network of businesses whose mission is to “mobilize the business community to support effective service and civic engagement by every American,”¹ is one of the most recent demonstrations of planned private sector involvement in communities.

Business leaders routinely invest in programs, whether planned or spontaneous, self-generated, or recruited through a collaborative venture, that address human needs. Increasingly, this investment is made with their most valuable asset — employees — by involving them in support of their communities through volunteering. The activities that result can range from nonprofit board service to time off for personal volunteering, company-wide national or global volunteer days, long-term company commitments to a nonprofit such as Habitat for Humanity, and many other company-endorsed volunteer initiatives.

The Points of Light Foundation and the Center for Corporate Citizenship at Boston College collaborated to examine the value-added benefits of employee volunteer programs. This report, focusing on HR, covers the following topics:

- **The Business Case for an Employee Volunteer Program (EVP)** examines reports suggesting that the benefits of employee volunteering extend beyond the communities where employees serve. Examples include increases in the leadership capacities of participating employees and brand recognition of companies hosting such programs. Findings also suggest that many companies — even those with the most advanced EVPs — often do not link the positive benefits of employee volunteering to business functions and often fail to make a strong case for employee volunteer programs.

1. <http://www.bsanetwork.com>

- **Introduction to the Conceptual Framework: The Human Resources Proxy Measure** reviews the current state of the EVP with a broad lens to identify impact measurement tools for EVP managers. A persistent gap in assessment of employee volunteering and its impact on the HR function was revealed. The conceptual framework proposed to measure EVP impact uses HR as the primary focal point of this analysis. Human resources is a proxy variable that can be replaced with virtually any other business objective.

- **The Human Resources / Employee Volunteer Program Link: A Literature Review and Observations from the Field** details evidence of a close connection between the HR function and an EVP. Benefits to HR include improved employee morale, recruitment, retention, and skills development.

- **Employee Volunteer Programs in Practice: A Synthesis of Participant Interviews** echoes findings from the literature review and suggests that an EVP positively impacts general HR objectives, including recruiting, retaining, and developing employees.

- **Five Critical Success Factors in Developing, Implementing, and Assessing an Employee Volunteer Program** describes elements necessary to create and implement a measurement procedure that communicates business impact related to an EVP, with a focus on creating internal buy-in for an EVP through measurement.

- **Building, Testing, and Implementing a Conceptual Framework** guides managers in measuring EVP outcomes in relation to HR objectives. The step-by-step approach contains examples from the field to illustrate the relevance of the framework in practice.

- **The Conceptual Framework in Action** applies the three-step approach to EVP elements and the HR business objectives. This approach includes building a conceptual framework, testing how current programs fit the conceptual framework, and measuring variables relevant to the framework.

The Business Case for an Employee Volunteer Program

Increases in the number and visibility of business-supported community involvement activities raise demands for demonstrated cost-effectiveness and return on investment from EVPs. Managers must choose among programs that appear to be equally worthy in terms of social benefit and emotional appeal based on value-added to sponsoring organizations. They must also determine what represents the most appropriate expenditure: direct service through the investment of human capital (volunteering), or more indirect community involvement through financial support of nonprofit programs. The *Community Involvement Index* (Boston College's Center for Corporate Citizenship, 2003) illustrates that companies are committed to integrating community activities into the business structure, with 65% of respondents factoring community involvement into their overall strategic plan and 80% of respondents including a statement in their annual report on their commitment to community relations or corporate citizenship.

Increasing evidence demonstrates that a strategic EVP can produce a return on corporate investment. Benefits include improvements in the following areas:

- Employee morale, which can lead to greater company loyalty
- Recruiting tools — company support for employee volunteering involvement provides an additional incentive for strong candidates to accept job offers
- Employee skills development — participation in volunteer activities helps employees develop new skills and leverage their current skills in addressing community needs

- Company image within the community, which can help to differentiate a company from its competition
- Reputation among investors and consumers as a responsible corporate citizen

In the research report *The Corporate Volunteer Program as a Strategic Resource: The Link Grows Stronger* (Points of Light Foundation, 2000), the Foundation found that 81.7% of responding companies focus their EVP on core business functions and 52% of respondents stress a commitment to community service in their corporate mission statement to help build a cooperative corporate culture. In addition, respondents reported using their EVP to address public relations goals (83%), meet marketing and communications objectives (64%), develop employee skills (60%), and recruit and retain employees (58%).

Corporate community involvement managers need to be prepared to make a case for starting, expanding, and sometimes continuing their EVP program.

Yet with all of this internal support and evidence of value added, corporate community involvement managers need to be prepared to make a case for starting, expanding, and sometimes continuing their EVP program. As with any corporate investment, senior leadership needs to know the returns their organization receives from their support of volunteering and what benefits can accrue to the business, employees who volunteer, and communities.

Despite this need for information, few companies measure the outcomes of their EVP. Commonly cited reasons include the following:

- **A bias for action.** Most managers have incentives to deliver programs, not measure programs.
- **Measure-phobia.** Many managers have concerns regarding the technical demands of measuring.
- **Internal skepticism.** EVP managers find that key colleagues and executives may not believe in the results that measurement processes yield.

EVP managers would do well to keep two adages in mind: (1) what gets measured gets managed; and (2) what gets measured matters. Just like other business functions, employee volunteering is important enough to warrant increased scrutiny. And, with better measures, increased program funding may be a distinct possibility in future budget years. Conversely, and depending on the culture of the company, an EVP that does not get measured may not become part of the mainstream business. With every downturn in the business cycle, it can emerge as a potential program to cut.

To seize the opportunity and take a leadership role in defining strategic value to the employer, EVP managers must measure program outcomes. A critical tool for any world-class organization, measurement establishes an EVP as a serious, value-creating support function for the company, employee, and community. Equally important, it provides essential feedback to enable continuous improvement.

Introduction to the Conceptual Framework: The Human Resources Proxy Measure

Although research on EVP measurement exists, few if any measurement frameworks or tools are available for managers to readily employ, and the demand for such frameworks is high across all industries. In an attempt to fill existing gaps in EVP measurement and communicate the value-added benefits of hosting an EVP, the Center and the Foundation partnered to create a practical framework for EVP assessment. Initially, EVP literature

and practices were viewed with a broad lens to determine which business functions these gaps most heavily affect. Figure 1 depicts key business objectives as they relate to the business benefits of employee volunteering and the state of measurement resources available to practitioners.

From this general perspective, key characteristics of the HR function make it an appealing focus for measurement.

Figure 1. OBJECTIVES, BENEFITS, AND ASSESSMENTS FOR AN EMPLOYEE VOLUNTEER PROGRAM

Business Objectives	Business Benefits from Employee Volunteering	Current State of Measurement
Human Resources	<ul style="list-style-type: none"> • Positive impact on recruitment and retention • Builds employee morale • Creative opportunities for professional development • Potential links to increased productivity 	 High need, strong potential for metrics, <i>gap in available tools</i>
Leveraging other community involvement activity	<ul style="list-style-type: none"> • Volunteering leverages the impact of other community involvement programs from cash contributions, to in-kind giving, to partnership programs 	 Tool development under way through other projects; e.g. the Center at Boston College
Marketing/Sales	<ul style="list-style-type: none"> • Potential to develop relationships and enhance the loyalty of consumers and customers • Enhanced image • Links to branding campaigns 	 High need, but alternatives for tools exist; e.g. research conducted by Walker Information with the Council on Foundations
Operational Support	<ul style="list-style-type: none"> • Relationship building with key opinion leaders in the community; e.g., leverage for government relations • Builds community support for a variety of public affairs challenges • Reduces risks and costs of operations (license to operate) • Identifies and builds responses to social issues that pose either opportunities or threats for the business; e.g., education, work force development 	 Need is industry specific
Reputation	<ul style="list-style-type: none"> • Builds reputational capital – creates a positive “face” for the company • Increases goodwill • Enhanced reputation leverages other support areas • Increased reputation aids market performance 	 Need depends on buy-in for reputation management; e.g. research conducted by Walker Information with the Council on Foundations

First, the objectives of HR are more consistent and independent of industry functions (e.g., recruiting, retention, and skills development) than other business functions such as operation support and reputation management. It therefore appeared more feasible to create a reliable measurement system for HR. Second, there is a gap in available HR metrics that does not exist at the same level in other areas.

With HR objectives identified as the chief business focus, this project took a highly participatory approach. Project sponsors — Farmers Insurance, Freddie Mac, Pitney Bowes, Sears Roebuck and Co., and Business Strengthening America —

Although research on EVP measurement exists, few if any measurement frameworks or tools are available for managers to readily employ, and the demand for such frameworks is high across all industries.

identified priority areas to study, including professional development through volunteering and demonstrated return on investment for business. In addition, project sponsors and other selected companies participated as subjects for this research, and relevant features of their volunteer activities are highlighted in a case study format.

Throughout this report, the HR function serves as the focal point. Yet it is impor-

tant to note that the conceptual framework presented here can be applied to any functional goals and measurement outcomes (the *Building, Testing, and Implementing a Conceptual Framework* section on p. 18 details the model at length).

The Human Resources / Employee Volunteer Program Link: A Literature Review and Observations from the Field

The lack of quality tools to measure EVP benefits has led to scant literature documenting the relationship between HR and employee volunteering. Increasingly, however, surveys report that businesses are linking HR with EVP efforts, and HR professionals are beginning to see the benefits of achieving HR goals through employee volunteering.

The Center's 2003 *Community Involvement Index* showed that HR departments are increasing their stakeholder involvement in community relations (CR) programs. Of the 151 professionals from a variety of industries who responded, 58% of HR departments are involved in CR programs, the third highest business function participation rate, behind media/public relations and government relations.

In addition, the Consulting Network's 2002 survey of 100 companies, *Practices in Corporate Employee Involvement Programs*, reported that 85% of respondents host employee volunteer programs, 29% of which connect volunteering with HR goals. Fifteen percent of survey respondents reported that the responsibility for managing the EVP is housed in the HR department.

Improved Employee Morale

In 2001, the Council on Foundations sponsored a robust corporate philanthropy research initiative with Walker Information, Inc. This research found that a company's community engagement activities have a positive effect on the average employees' satisfaction and loyalty. John Weiser and Simon Zadek highlighted this work in *Conversations with Disbelievers*: "A company's

support of employee volunteerism is a key driver directly influencing employees' feelings about their jobs. For example, employees involved in employer-sponsored community events were 30% more likely to want to continue working for that company and help it be a success."

From its survey representing businesses of at least 50 employees (n = 2,400), the Walker Information report also revealed that employee volunteering is a major factor in favorably influencing employee perceptions of the company — more than cash donations, in-kind contributions, or nonprofit sponsorship.

Improved Employee Skills Development

In its 1998 study *Valuing Employee Community Involvement*, the Corporate Citizenship Company examined the self-perceptions of staff who participated in volunteer programs, measuring

Walker Information found that a company's support of employee volunteering is a key driver directly influencing employees' feelings about their jobs.

Source: Zadek & Weiser, *Conversations with Disbelievers*, 2000

competency gains with “before and after” self-assessments. These employees, nearly 400 representatives from U.K.-based companies, assessed their performance as showing an overall improvement of 17% attributed to participation in volunteer programs. The supervisors who assessed the same employees rated them as showing an overall improvement of 14%. Both findings compared favorably with the ratings of traditional training programs. The top three competencies showing the most development gain were communication skills, collaboration and team-working skills, and creative thinking skills. In its *The Link Grows Stronger* report, the Points of Light Foundation (Foundation) found that 60% of responding companies (n = 248) use employee volunteering in developing employee skills (Points of Light Foundation, 2000).

More recently, the Institute for Volunteer Research for Barclays Bank reported that employee volunteering benefits both employees and the company in tangible ways. Through a comprehensive investigation including surveys and case studies, researchers found that employees who participated in community service activities improved their skills and were more likely to stay with Barclays Bank than those who did not volunteer. Other positive findings included that 58% of responding managers “reported that their staff worked better together after volunteering” and 61% of responding volunteers felt “that their team-work skills had grown” (Institute for Volunteering Research, n.d., p. 2).

Improved Recruiting and Retention

Recruiting and retaining employees are critical success factors for many companies. The Foundation found in 2000 that 58% of responding companies use employee volunteering in recruiting and retaining employees (*The Link*

Grows Stronger). In addition, over 90% of respondents believed employee volunteering improves employee teamwork and helps improve employee morale.

Although the literature documenting a relationship between HR goals and employee volunteer programs is not substantial in quantity, there appear to be clear indicators of a link. Specifically, the benefits of employee volunteering as related to the HR function include improved employee morale, skills development, recruiting, and retention.

Observations from the Field

Linking EVP with the HR function provides an effective way to measure benefits for employees and the company. In the Foundation's *The Link Grows Stronger*, of the 248 U.S. companies that responded, 81% track the benefits to employees and 84% measure the benefits to the company from employee volunteering.

Companies are not taking advantage of the powerful synergies between HR and an EVP. EVP managers design programs to fit a broad array of interests. The resulting portfolio typically includes programs that respond to interesting and compelling requests from nonprofits, executive board placement, generalized volunteer job placement, and one-day events that often involve charitable walks and clean-up activities. Programs that engage employees to provide *pro bono* services — such as providing strategic management guidance to social service agencies — are becoming more common. Finally, some companies design one or more strategic volunteering initiatives around a core focus of social impact.

After implementation, programs often receive only a cursory review to determine if they have generated benefits for the corporate bottom line. Lacking an intentional connection of the EVP to

business goals, this approach relies on good intentions rather than strategy to generate return on investment.

On the basis of the review of the state of the field and the experience of several companies committed to building excellence in an EVP, the

Center and the Foundation have designed a simple yet rigorous approach to measuring EVP impact that will overcome the obstacles mentioned above (a bias for action, measure-phobia, and internal skepticism) and strengthen EVP's value and performance overall.

Employee Volunteer Programs in Practice: A Synthesis of Participant Interviews

Interviews conducted with HR administrators echoed the findings from the literature review and field observations. The interviews were designed to garner a better understanding of how HR administrators view their EVP, particularly with respect to contributions to HR goals and priorities. Participants were project sponsors from Farmers Insurance and Pitney Bowes, in addition to selected representatives from Safeco, Deloitte & Touche (Deloitte), and IBM.² A cross-section of companies with differing levels of EVP involvement ensured that a spectrum of opinions was gathered. In spite of their differences, all the companies reiterated the supposition that their EVP positively impacts employee morale, skills development, recruiting, and retention.

The interviews consisted of eight open-ended principal questions, intermixed with a series of sub-questions used to clarify responses as necessary.³ The 13 HR professionals who participated in the telephone interviews brought extensive experience to the discussion (ranging from 3 to 36 years of corporate experience per participant). Following is a synthesis of participant responses that focuses first on the EVP as it impacts the company in general, second on the EVP as it impacts the corporate HR office, third on the EVP as it impacts employee volunteers, and finally on measuring the impact of EVP on external and internal outcomes of human resources.

Impact on the Company

In summary, representatives from participating companies felt that their EVP develops employ-

ees, improves public perception about the company, and enhances operations.

Develop employees

An EVP provides an opportunity for employees to:

- Demonstrate an interest in and ability for taking on new and different responsibilities
- Broaden skill sets
- Get noticed by management and become “promotable”
- Build competencies through an employment-related volunteer activity

Improve public perception

An EVP provides an opportunity for the company to:

- Improve brand recognition and corporate reputation
- Maintain positive perceptions
- Be a “good neighbor in the community”
- Meet expectations that the company is “involved in communities where . . . employees live and work”

Enhance operations

An EVP provides opportunities to:

- Bring together staffers across job functions to develop projects
- Highlight messaging regarding the company's ability to “provide service to customers and the community”
- Improve cross-functional relationships
- Offer “high potential” leadership and project management skills
- Build client relationships

2. See appendix A for interview participant volunteer program descriptions

3. See appendix B for interview script

- Foster a strong sense of community because “employees look for ways to become involved in local issues”
- Send positive messages to potential clients and employees

Impact of an Employee Volunteer Program on Human Resources

When viewing the impact of an EVP from the HR perspective, respondents consistently cited that the EVP improves the effectiveness of the HR office to recruit and retain qualified employees.

Recruitment

All respondents agreed that the EVP enhances recruitment efforts. One respondent, for example, uses the EVP as a tool to “talk about what we do and to see whether our interests match theirs.” This view is echoed by another example in which the company hosts a student leadership conference that includes a community service component and discusses community involvement in recruitment material to demonstrate that “service is part of our culture.” Even when the company does not have community involvement activities as a standard component in its recruitment or orientation processes, the EVP message appears to reach the desired audience, even if “it is more word of mouth . . . not part of the package, but part of the conversation.”

Generally, respondents believed an EVP aids recruitment efforts in two key ways:

- Draws people who have an interest in the community
- Increases access to the best people

Retention

When asked if the EVP helps retain employees, all respondents agreed that it does. Specifically, respondents felt that volunteering:

- Brings to the forefront face-to-face interaction among colleagues
- Can make “jobs easier in local markets” because of positive job image, thus boosting retention on a local level
- Deepens the strength of relationships among employees and with employers
- Helps achieve the HR goal to ensure “employees see themselves as more than just cogs in a wheel”
- Keeps employees engaged by breaking the monotony and isolation of many low-skilled jobs
- Solidifies the company as an “employer of choice”
- “Strengthens the relationship with employees outside the normal scope of the job”

In addition to recruitment and retention as the EVP’s most valuable contributions to the HR function, respondents mentioned that the EVP reinforces the “connectivity and ties that bind HR with our people” to increase employee morale, develop employee skills, and generate a positive public image.

Impact on Employee Volunteers

Across the board, respondents agreed that EVP participants develop skills through volunteering. Although three companies do not track skills development and other companies admit their monitoring systems are not accurate, all respondents believed a change in skills occurs after EVP participation. Two respondents felt the development of skills through the EVP is especially pertinent to junior staff and/or those in lower-skilled positions. Figure 2 lists the skills respondents felt were enhanced through their EVP.

Generally, respondents believed these skills could be as effectively attained through volunteer programs as in other, more traditional ways; e.g., for-

Figure 2. Transferable Workplace Skills Employees Develop through Volunteering

<i>General skills</i>	<i>Specific competency</i>
Project skills	Budgeting Company liability Communications Task execution Planning and organizing Presentation Project management Public relations Supervision
Leadership skills	Ability to influence others Learning about the community Mentoring Relationship building Teamwork
Interpersonal skills	Networking Sharing expertise with others Team building
Personal skills	Healthy whole-person Perseverance Work/life balance

mal courses, training, or seminars. Some respondents, for example, noted that courses, job coaches, or on-the-job assignments can foster skills development, but stated that these avenues are not applicable to all employee positions or learning styles. In addition, one respondent said an EVP is more cost-effective than other skills development programs that would stimulate similar outcomes. Another respondent noted that with more cost-

effective solutions; e.g., online training, the same skills development does not take place; e.g., relationship skills, leadership.

Respondents suggested several strategies to enhance the capacity of an EVP to foster skills development. Most frequently mentioned were funding and staffing the program more fully, collaborating with clients on projects, and tracking specific workplace competencies integrated into volunteer activities.

Measuring the Impact of an Employee Volunteer Program on Human Resources

When respondents were asked “What particular outcomes resulting from an EVP would be most meaningful to you in your HR efforts,” responses fell into two categories:

- Internal outcomes — leadership and skills development and advancement of EVP participants within the organization
- External outcomes — EVP accomplishments that build public trust and increase brand recognition

To measure these outcomes, one company includes internal outcomes in its individual employee performance evaluation plans; another measures external outcomes by using an advanced intranet to “conduct baseline studies in communities . . . to assess community impact on brand and reputation.” Other companies do not have systems in place. One respondent stated that identifying relevant and measurable outcomes would be quite difficult because the respondent had not even considered measuring impact in this way. Another respondent group stated they would hope to avoid “behaviorally angled questions, which would not get at the benefits of an EVP around employee engagement,” but instead “track frequency and depth of [volunteer] engagement.”

The systems currently used to measure EVP outcomes vary dramatically. The same company that uses an advanced intranet to measure external outcomes also applies it to internal EVP processes, including connecting employees to service opportunities, surveying employee opinions and satisfaction levels, providing information on grant programs, and tracking participant hours. Other companies use less complex methods that include tracking output measures on volunteer projects for company-sponsored activities and donation programs or requesting information on individual community service participation on a purely nonobligatory basis. In addition to these less formal methods, one respondent complements the information with surveys to assess the impact of community involvement on employee participants and host agencies. Most respondents stressed that contribution of this information by employees is strictly voluntary.

A few respondents explained how they use the data collected on an EVP to inform work. Whereas one respondent collected output information only to support a biennial report and

another cited the importance of participation numbers to inform budget development, others emphasized the importance of focusing on actual results. A few programs use EVP data to select awards program winners, inform and enhance marketing materials, create rotating success stories on corporate websites, and develop tools volunteers can use at agencies.

Conclusion

All HR administrators interviewed as part of the project believed an EVP is a sensible, efficient method to achieve general HR objectives, including recruiting, retaining, and developing employees. Beyond the HR function, respondents viewed the EVP as evidence of the company's solid dedication to improving communities in which employees live and work. Despite the fact that the EVP is generally viewed as a positive asset to the company, externally and internally, even the most advanced employee volunteer programs appear to possess few tools to measure meaningful outcomes.

Five Critical Success Factors in Developing, Implementing, and Assessing an Employee Volunteer Program

Five success factors are essential in creating and implementing a measurement process that communicates business impact related to the EVP and helps create internal buy-in across business functions.

- 1. Take a strategic approach.** Start by clearly identifying the key goals you are trying to deliver. For example, what specifically should the EVP deliver for the company, employee, and community? If employee morale and retention are key goals, specify these goals up front, before designing volunteer programs. Setting goals and planning to measure them will drive how volunteer programs are designed.
- 2. Build a conceptual framework for your program.** As documented by two accounting faculty members from Wharton Business School, successful, high-performing companies measure staff support functions as well as the bottom line (Ittner & Larcker, 2003). Set clear goals and build a conceptual framework for employee volunteer programs. If you want to use an EVP to support employee recruiting, design a program that specifically speaks to that outcome. An example would be a targeted and extensive communications campaign about the company's EVP, used at critical campus recruiting sites to draw the type of entry-level candidates the company wants as well as to increase the yield rate of those accepting offers. Design a process to measure recruiting success at those campuses and the relationship of that success to EVP communications.

3. Take an inventory of existing metrics.

Where possible, try to piggyback on existing measures used inside the company. For example, if HR uses employee opinion surveys to measure morale, EVP managers should use a similar process, or better yet, include several questions on HR surveys to assess employee experience, awareness, and attitudes toward the company's support of volunteering (Ittner & Larcker, 2003; Rochlin, Coutsoukis, and Carbone, 2001; Weiser & Rochlin, 2004).

4. Find the metric gaps and modify as necessary.

It is understood that most EVPs have multiple goals that may be serving the needs of HR, community relations, and marketing. The point is to make sure all goals can be measured in some way. What happens if a company specifies its EVP goals clearly, but it appears that existing EVP initiatives will not produce the result the company hopes to achieve? It may be necessary to modify volunteer programs or start over with a new program design.

5. Engage key stakeholders.

Overcome skepticism by making the process participatory. Approach colleagues from key staff and business lines that have ownership of the business goals that the EVP is looking to support. Involve these colleagues in the design and measurement process, asking what metrics would convince them that the EVP added value. For instance, EVP managers should work across functional departments in areas such as sales, marketing, and operations to bridge the EVP into other parts of the company.

Building, Testing, and Implementing a Conceptual Framework

With the five critical success factors as background, companies can follow a simple yet rigorous three-step approach to measurement:

STEP 1. Build a conceptual framework

STEP 2. Define questions and the measurement scheme

STEP 3. Implement the measurement scheme to test the conceptual framework

The following describes each step in detail. The experiences of Safeco Insurance, IBM Corporation and Deloitte & Touche, three project participants, are used to illustrate the process where appropriate.

STEP 1. Build a conceptual framework

In this first step, the EVP manager must identify the relationship between the EVP and company goals, stakeholder needs and interests, and potential outcomes of the EVP.

Element 1. Identify the key business goals of the employee volunteer program

Ensure that the company is clear about the goals it wants to achieve from its EVP. Though the focus of this discussion is on business value, it is essential that companies balance bottom-line goals with employee benefits and community objectives.

Example from the field: Safeco identifies the use of its EVP to support the professional development of employees as one of its key goals.

Element 2. Collaborate with key stakeholders

Instead of building the framework in isolation, EVP managers should engage internal stakeholders. Typical EVP stakeholders include the company (as a whole and as represented by specific functions), employee volunteers, and the organizations where employees volunteer.

Example from the field: In Safeco's case, the managers of the EVP do not possess any responsibility or ownership over the company's training and development goals and operations. By developing relationships and through dialogue, Safeco EVP managers not only built buy-in for this goal but also generated enthusiasm.

“Each Safeco manager and employee determines together what skills they want to build through volunteering, training, and seminars.”

Safeco EVP Manager

Example from the field: For IBM, the launch of its EVP intranet brought together staff from HR, information technology, and community relations to develop a system to meet the goals of its EVP. Paired with backing from IBM senior leadership, cross-departmental involvement in creating the community-giving program produced enterprise-wide buy-in. From a HR perspective, IBM believes the positive community image resulting from the program will “help us get the best people.”

“As [IBM] employees get involved, they develop a sense of value, worth, and identification of a global community.”

IBM EVP Manager

Element 3. Identify specific outcomes linked to relevant business functions most likely to be key advocates of the employee volunteer program

In this early stage, it is beneficial to anticipate the methods that will be required to collect data that support the business objectives. Will data be quantitative or qualitative? What level of measurement will best capture the data? For example, it might serve the company's objective to focus on the two most basic forms of measurement: inputs (resources required to create and run the EVP) and activities (the activities required to create and run the EVP). However, in the case of HR, the measurement focus will be on more advanced metrics, including outputs (immediate and direct results of impact) and outcomes (longer-term, direct and indirect results). Determining which data to collect, similar to

determining the EVP goals and aligning the EVP with the relevant business function (in this example, HR), is not arbitrary.

Example from the field: In Deloitte's case, linking HR goals to its EVP outcomes provides key opportunities to generate EVP support. For instance, Deloitte respondents focused on the migration of businesses to electronic communications, where volunteering brings people back together. For Deloitte, the EVP can be tied to a more connected workplace:

- Interpersonal skills (e.g., communications, public speaking)
- Leadership
- Teamwork
- Awareness of community
- Perseverance
- Execution

“[Deloitte's EVP] strengthens relationships with employees outside the normal scope of the job.”

Deloitte
EVP Manager

STEP 2. Define questions and the measurement scheme

Performance excellence demands that companies follow through with measurement in order to create a strategic EVP that adds value to the company, employees, and community. There are four elements to this step.

Element 1. Define the questions that when answered will determine whether or not the EVP is meeting its goals

Companies should ask, how will we know if our EVP is delivering on its goals? Other examples of questions for the goal of recruitment and retention follow:

- Does our EVP help attract and retain employees?
- Do candidates choose to work for us because of our EVP?
- Are employees who are aware of and participate in our EVP more loyal than those who are not? (Rochlin et al., 2001, p. 18)

Example from the field: With regard to Safeco's goal of professional development, questions could include the following:

- Do employees who volunteer develop their skills and competencies?
- Has their on-the-job performance improved as judged by supervisors?
- Has their leadership potential been enhanced as judged by supervisors and peers? (Rochlin et al., 2001, p. 18)

Element 2. Determine what metrics would answer those questions

Brainstorm potential metrics that would answer the questions identified. The way that questions are framed can help lead directly to obvious and useful metrics. In light of the complex nature of HR objectives, it is important to keep in mind that one data point might not fully capture projected EVP impact. For instance, when an attempt is made to isolate the change in time

management skills pre- and post-EVP participation, numerous variables can serve as indicators of change. Supervisor ratings, amount of time spent on projects, and punctuality in reporting to work, though not direct measures of improved time management, can logically be tied back to HR goals. In other words, it is good practice to use more than one indicator to measure outcomes, especially for the complex requirements of HR.

The following five characteristics of good indicators will help EVP managers and key stakeholders select appropriate and feasible data points to collect:

1. Relevant to the goals of the program to be evaluated
2. Understandable, simple, and unambiguous
3. Realizable given logistical, time, technical, or other constraints
4. Conceptually well-founded
5. Limited in number and able to be updated at regular intervals

Some general examples of metrics for goals reflecting recruitment and retention include the following:

- Survey those aware of the company's EVP versus those who are not. Compare the turnover rate for employees who are aware with the rate for those who are not.
- Do the same for those who participate in an EVP. (Rochlin et al., 2001, p. 20)

Example from the field: For Safeco, potential metrics include:

- Supervisor assessment of the results of employees' volunteer experiences
- Comparative supervisor performance appraisals for employees participating in the program versus those who do not
- Testing skill and competency development of those employees volunteering in the program compared with employees who use other skill development means
- Records of promotions, raises, bonuses, and internal recognition for employees in the program versus those who do not participate
- Compare the costs of using an EVP for professional development versus traditional classroom approaches

In conducting this measurement audit, it is important to go beyond feeling and intuition and search for evidence of the impact of existing programs on the goal(s) in question. This evidence could be quantitative in nature: for example, use of employee volunteer programs as a training and development tool is saving the company thousands of dollars over the use of more traditional classroom methods. It also could be qualitative: for example, several supervisors report compelling anecdotes indicating how their staff is returning with valuable new skills. However, it is important to base decisions as much as possible on facts and data.

Element 3. Identify appropriate methods to gather metrics (e.g., surveys, cost-benefit analyses)

Once questions and related metrics are defined, identify the best methodology to gather data

needed for measurement. Data relevant to the conceptual framework that are already collected (e.g., absenteeism, number of volunteers) will use the least amount of staff resources. Beyond that, EVP managers should look to data the company collects but does not analyze in a manner that will link to volunteer goals (e.g., noting change in performance reviews for volunteers versus nonvolunteers). Finally, EVP managers can choose to develop instruments that capture the precise data desired. Because it expends the most staff resources, this final collection method is also the most difficult.

Example from the field: For Safeco, Deloitte, and IBM programs, approaches could include:

- Formal interviews of supervisors
- Employee self-reports
- Nonprofit feedback
- Cost-benefit analysis
- Employee surveys
- Opinion surveys with community leaders

Element 4. Develop consensus for “reasonable” metrics among “reasonable people”

Stakeholders should be included throughout the metric audit process, and the same cross-functional colleagues involved in the creation of the conceptual framework should be engaged in building reasonable metrics. In determining the reasonableness of measures, some benchmarks include how often measurement is required (one-time versus ongoing), the costs and benefits of capturing these particular indicators, and a check to determine if the feasibility of collection balances with the quality of data.

This conceptual framework is not intended to establish a causal relationship and eliminate questions of confounding variables. It is possible, for example, that those individuals who are already high-performing, loyal, and highly satisfied with their employer are more likely to participate in volunteer programs. The point is not to design bulletproof scientific tests to eliminate such questions. Rather, the goal should be for reasonable people to design reasonable, practical metrics that persuasively test the impact of an EVP. If, for example, there is a concern that high performers will self-select to participate in the employee volunteer program, then metrics should query supervisors on whether the individual in question would already have been rated well on key skills and competencies without the volunteering experience.

STEP 3.

Implement the measurement scheme to test the conceptual framework

The third step helps EVP managers gauge the present state of the EVP in relation to business goals (step 1) and measurement strategies (step 2), and encourages EVP managers to modify programs and marketing materials to align with these goals as close as possible.

Element 1. Assess whether current programs are designed to support goals

Some companies have not designed their EVP with strategic goals in mind. Therefore, their programs will not deliver specific, measurable results. Managers must ask tough questions of their program, and if existing programs will not lead to the desired effect, then managers must strongly consider modifying them or developing a new EVP approach altogether. With the conceptual

framework delineated, EVP managers will be well equipped to align EVP outcomes closely with business objectives.

Example from the field: IBM made a modification to its EVP upon recognizing the need to expand its EVP to mirror its global reach. Foreseeable HR-focused measurement strategies, built directly into its globally accessible intranet application, were described as including employee pulse surveys and an employee satisfaction index.

Element 2. Look for evidence of effective EVP communications

Assessment of program fit includes the approach to EVP communications. Typically, companies use a passive, buckshot approach to EVP communications, especially internal communications. Tools such as the volunteer bulletin board, pictures on the company intranet, brief coverage in company newsletters, and a glossy brochure for new employee orientation have little measurable impact. What is more, these communications do not provide a message that reinforces the key goals for strategic EVP. Companies should subject their EVP-related communications to the same audit as they do their programs.

Example from the field: Deloitte helps ensure consistent messaging about its EVP goals by describing community engagement in all collateral materials, including a community service component during student leadership conferences for top recruits.

The Conceptual Framework in Action

To illustrate the conceptual framework in action, the three-step approach is applied to EVP elements related to human resources objectives.

Step 1. Build a conceptual framework

In Figure 3, Element 1 represents the HR function, where the four main goals are recruiting,

retaining, developing skills, and building morale. These business goals represent the issues most frequently mentioned in our interviews with HR administrators. Element 2, building the framework in conjunction with key stakeholders, lists the typical internal stakeholders of an EVP.

Element 3 details examples of outcomes linked to relevant HR functions.

Figure 3. CONCEPTUAL FRAMEWORK	
Element	Example Outcome
1. Identify key business goals of the EVP	Improve HR function <ul style="list-style-type: none"> ▪ Recruiting ▪ Retaining ▪ Developing skills ▪ Building morale
2. Collaborate with stakeholders	Conduct focus groups or interviews with <ul style="list-style-type: none"> ▪ Management and staff ▪ Senior leadership ▪ Organizations where employees volunteer
3 Identify specific outcomes linked to relevant business functions most likely to be key advocates of the EVP	<ul style="list-style-type: none"> ▪ Candidates attracted to company ▪ Employee turnover decreases ▪ Employees develop leadership skills ▪ Employees feel connected to coworkers

Step 2. Define questions and the measurement scheme

EVP managers should continue to work with key stakeholders to develop a measurement system that will gather valuable information. In Figure 4, Element 1 defines the research question related to HR goals. Element 2 provides sample metrics

to determine if these HR goals are achieved.

Element 3 identifies methods to capture data.

There is a fourth element not listed because it is a case-by-case decision. This element requires EVP stakeholders to identify the most important questions to ask based on resources available for data collection.

Figure 4.

MEASUREMENT SCHEME

	Element 1	Element 2	Element 3
HR Goals	Define the questions that when answered will determine whether the EVP is meeting its goals	Determine what metrics would answer those questions	Identify methods to gather data
Recruitment	Are candidates more likely to accept a position because of the EVP? Is the EVP adequately described in recruitment materials?	Potential employees cite the EVP as reason for wanting to join the company Ensure the EVP message is contained in public materials, especially recruitment materials	Include standardized questions during HR interview or new-employee orientation process Review recruitment materials (print, web, recruiters training manual) to determine if the EVP message is present and consistent
Retention	Do employees who participate in the EVP stay with the company longer than those who do not participate? Are employees who participate in the EVP more loyal than those who do not participate?	Length of tenure at company Employee perceptions about company	Administrative data on length of employment and participation status in the EVP Random sample of EVP participants and non-participants surveyed on perceptions of loyalty and commitment to company
Skills Development	Has participant leadership potential been enhanced as judged by supervisors? Is the EVP a cost-efficient way to develop employee skills?	Supervisor perceptions Costs and benefits of the EVP compared with some other program (e.g., formal courses)	Include standardized questions on supervisor evaluations of staff to determine leadership ability. Compare non-EVP with EVP participants on these variables: <ul style="list-style-type: none"> ■ Conduct analysis to determine costs (include employee time away from job) ■ Survey employees participating in the EVP and formal training courses to capture benefits across training methods ■ Compare benefits with costs
Morale building	Do employees participating in the EVP feel more connected to colleagues than do employees not participating? How do employees who participate in the EVP rate work/life balance compared with those who do not participate?	Employee perceptions about colleagues Employee perceptions about work/life balance	Random sample of EVP participants and nonparticipants surveyed on perceptions of connectedness within different company units (e.g., in unit, across units) Random sample of EVP participants and non-participants surveyed on perceptions of work/life balance

Step 3. Implement the measurement scheme to test the conceptual framework

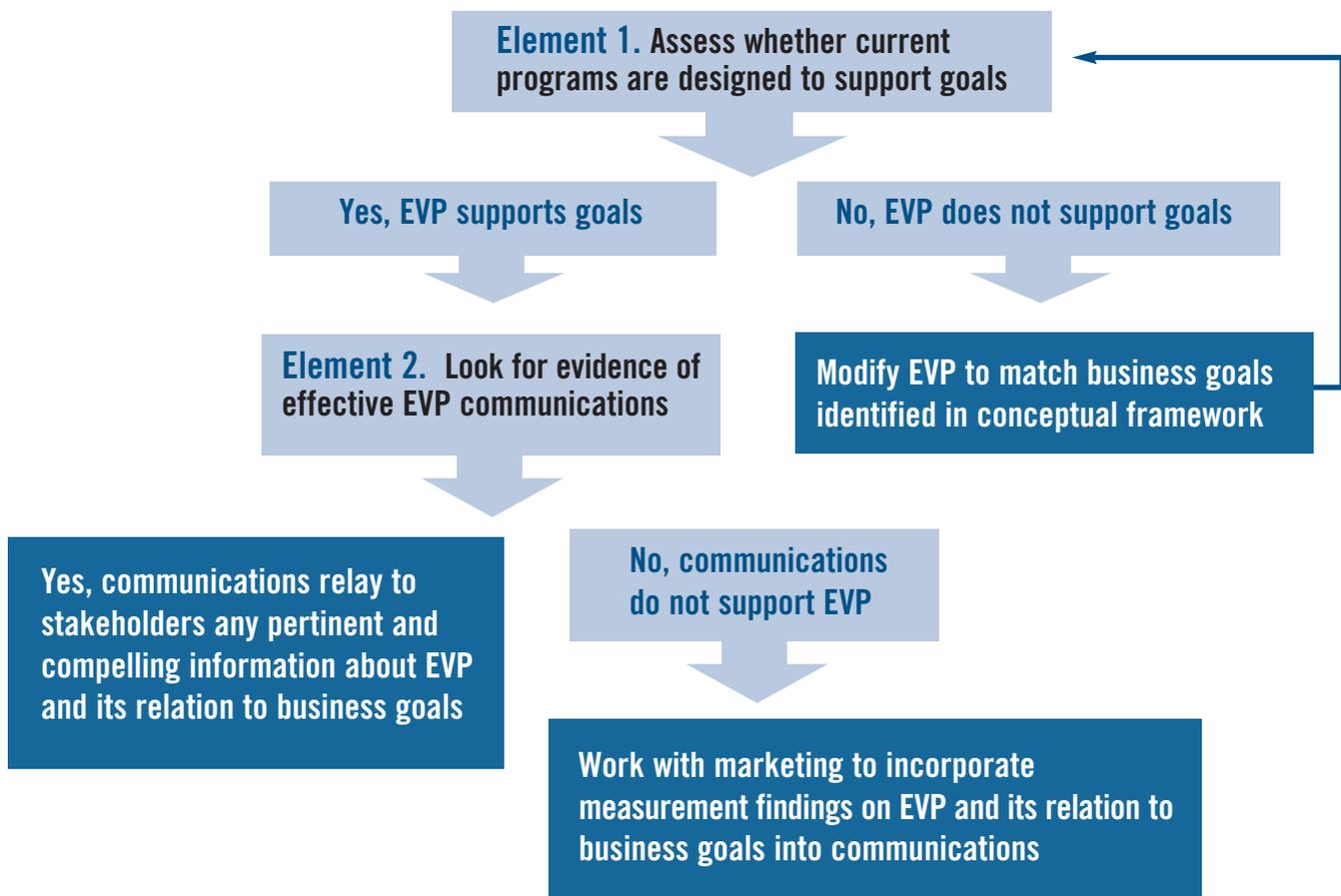
After measurement is implemented, EVP managers will be able to assess if employee volunteer programs fit the conceptual framework with regard to business goals, stakeholder needs, and outcomes relevant to business functions. If the EVP is not meeting these goals, managers should consider modifying the program (Step 3, Element 1). If

results of measurement indicate that the EVP is supporting business goals, communications mechanisms should be reviewed to verify that a compelling message about the EVP in relation to business objectives is conveyed (Step 3, Element 2).

Figure 5 depicts a logic model EVP managers can follow, based on the answers to research questions, to test the fit of the conceptual framework.

Figure 5.

LOGIC MODEL TO TEST CONCEPTUAL FRAMEWORK



Conclusion

The participants in this research project, *Measuring Employee Volunteer Programs: The Human Resources Model*, represent a cross-section of employee volunteer programs in the United States with regard to size and scope of activities. As has been demonstrated through interviews, analysis of current practices, and a literature review, the task of measuring defensible EVP impact is difficult and sometimes challenging for EVP managers.

All participating HR administrators agreed, that an EVP advances HR objectives. The most commonly cited objectives are recruitment, retention, professional development, and building morale. Although evidence in published reports and studies indicates this belief to be true, in general, EVP managers have little evidence to offer as fact to support their program performance reviews and reports to stakeholders.

Out of this HR-specific focus grew a general framework to measure employee volunteer programs, with a heavy emphasis on the need to:

- **Take a strategic approach** when designing the program and deciding what the company hopes to achieve through such a program, including return on investment.
- **Build a conceptual framework** relevant to the EVP as well as the company's broader goals to ensure the data generated is useful, enabling

EVP managers to communicate impact and justify expenditures to stakeholders.

- **Take an inventory of existing metrics** and build from them, allowing EVP managers to capitalize on established procedures and minimize the administration of obtrusive data collection measures.
- **Find the metric gaps and modify as necessary** or create new, supplemental metrics.
- **Engage key stakeholders** in the measurement process, from the identification of data points to data collection methods, to foster a sense of buy-in and increase the data relevance for company as a whole.

Measuring employee volunteering requires an investment of time and effort, but the documented outcomes that result will provide an understanding of the significant benefits accrued through an EVP. The Conceptual Framework is a rigorous step-by-step process that EVP managers can use to articulate the impact of an EVP on particular business objectives. Although measurement does not promise positive answers to all questions about the EVP, valid information will place EVP managers in a position to address concerns about their programs, continue those practices found to be efficient and effective, and develop the EVP as a strategic asset in the perceptions of both internal and external stakeholders.

Appendix A.
Interview Participant
Volunteer Program
Descriptions

Deloitte & Touche USA LLP

COMPANY STATISTICS

Industry: Audit/Tax/Consulting/Financial Advisory — Deloitte & Touche USA LLP (Deloitte), one of the nation's leading professional services firms, provides audit, tax, financial advisory services, and consulting through nearly 30,000 people in more than 80 U.S. cities. As used in this document, “Deloitte” refers to Deloitte & Touche USA LLP and its subsidiaries.

Headquarters: New York, NY

Size: nearly 30,000 employees (domestic)

EMPLOYEE VOLUNTEER PROGRAM (EVP) FACTS

Name of EVP: Deloitte uses the term “Community Involvement” to describe its program. Its Community Involvement program encompasses workplace volunteering, *pro bono* consulting, community leadership, workplace giving, and corporate philanthropy.

EVP scope: The scope of Deloitte's Community Involvement program is national (U.S.). The organization operates in more than 80 cities nationwide.

Date established: 1999 (date of formal program establishment; Deloitte has a decades-long history of contributing to its communities).

Number of employees in EVP: More than 20,000 employees volunteer in at least one initiative of the employee volunteer program each year.

How the EVP is communicated to internal and external stakeholders: Deloitte communicates internally about its commitment through voicemail, email, the national intranet as well as the second intranet devoted to community involvement, and its tangible commitment to the community. The CEO often delivers voicemail messages to all personnel, which underscores the priority the firm places on corporate citizenship. All employees are also exposed to the volunteer program during new-hire orientation. The investment in and development of the formal community involvement program has also sent a clear and consistent message to employees that community service is a top priority.

Deloitte communicates externally about its commitment through its collaborations with organizations such as Junior Achievement and United Way. Senior leadership often weaves messages about community service into their external speeches. The external website contains a comprehensive section on community involvement, and it receives significant traffic throughout the year. Finally, Deloitte communicates through the media by drawing attention to thought leadership and community activities. Deloitte received an Honorable Mention from the 2004 PR News CSR Awards in the Philanthropy Communications category.

What are the primary social issues addressed by corporate-sponsored activities? On a national level, Deloitte has focused on the social issue of ethics education. Together with Junior Achievement, Deloitte developed *Excellence through Ethics*, a curriculum that teaches students the concepts of ethics in

business earlier than they have ever been taught before — when the content of their character is still taking shape. Deloitte believes that helping to instill a solid ethical foundation in the business leaders of tomorrow will have a significant impact.

With 900+ classroom volunteers and approximately 40 board members from local Junior Achievement boards across the country, Junior Achievement gives Deloitte employees an outstanding opportunity to do something meaningful for others, and it has created a sense of pride across the organization.

Supportive Policies and Programs

Management-directed time off

- Given on IMPACT Day where the projects are undertaken and sponsored on company time.

Flex-scheduling

- Employees have the option to use flexible scheduling to volunteer for different projects that are not firm-sponsored and that cannot be done outside business hours.

Release time

- All employees are encouraged by the company to volunteer and may use flexible scheduling during work hours. Deloitte is currently piloting a release-time policy in the United States.

Dollars for Doers

- Offered in a limited number of cities on a local basis.

Retiree volunteering

- Deloitte's alumni and retired partners are encouraged to participate through IMPACT Day, for which each office chooses projects reflective of their community's culture and need.

Partnerships

- Deloitte works with many nonprofits such as Junior Achievement, United Way, Habitat for Humanity, City Cares affiliates, Boys & Girls Clubs of America, the Points of Light Foundation, and local Volunteer Centers.

Charitable donations

- Deloitte gives millions of dollars each year to nonprofits, public K-12 schools, and other charities. In 2004, it ran the largest electronic United eWay campaign in the history of United Way, was the largest contributor to the United Way among professional services firms, and had the highest number of Alexis de Tocqueville givers (those giving at the \$10,000+ level) of any company in the country. Deloitte also donates valuable time and resources to the community through its *pro bono* activities. Recent efforts include developing Microsoft Office tools for budgeting, tenant profiling, and transportation services with Project ACT for women's shelters in Cleveland, OH.

Employee charitable contributions (payroll deduction)

- All Deloitte employees are encouraged to donate financially as well as give their time. All recipients must have tax-exempt status.

Company-sponsored projects

- IMPACT Day is Deloitte's national day of community service when offices across the country plan programs to address community needs. IMPACT Day takes place on a workday and is management-directed time off.

Supportive Policies and Programs

Company-sponsored mentoring/tutoring

- Through the School To Work Day initiative, Deloitte employees interact with underprivileged students developing mentoring relationships, teaching computer literacy, and showing students how to dissect a business case and improve communication skills. The program promotes college awareness and attendance.

Capacity building/ board development

- Through nonprofit board participation, Deloitte matches its trained professionals with locally based nonprofits that can benefit from the training and expertise of a Deloitte executive. Partners, directors, and senior managers also donate their time through *pro bono* or discounted projects to build the capacity of an organization.

Employee Volunteer Recognition Program

- Deloitte's Community IMPACT Awards recognize the dedication of the organization's people to improving the quality of life in their communities. Deloitte recognizes ten individuals and five offices annually for commitment to the community; Deloitte contributes a total of \$75,000 to charitable organizations selected by the winners.

Skill development through volunteering

- The firm identifies locally based training and board matching opportunities through boardnetUSA and the Volunteer Consulting Group. Employees also develop business skills in work planning, relationship development, communication, and team leadership by reverse model initiatives where lower-level employees lead in some volunteer projects.

Farmers Insurance

COMPANY STATISTICS

Industry: Insurance — Farmers Insurance Group of Companies is one of the nation's largest auto and home insurers. They serve consumers in 29 states by providing insurance management services.

Headquarters: Los Angeles, CA

Size: 31,000 (18,000 employees and 17,500 independent contractors and independent agents)

EMPLOYEE VOLUNTEER PROGRAM (EVP) FACTS

Name of EVP: N/A — Employees volunteer through various signature programs.

EVP scope: Domestic

Date established: N/A — Farmers' commitment to the community is said to have started at the founding of the company in 1928.

Number of employees in EVP: Over 15,000 Farmers' employees donated more than 75,000 volunteer hours in 2000.

How the EVP is communicated to internal and external stakeholders: Information not available.

What are the primary social issues addressed by corporate-sponsored activities? Most of Farmers' corporate-sponsored activities are directed at child safety issues, educational enhancement, civic participation/awareness, and diversity.

Supportive Policies and Programs

Charitable donations

- Farmers' corporate giving was \$2.1 million in 2000.

Partnerships

- “The Community Gatherings,” which involve free health screenings, child ID service, nutrition and safety information, and investment planning for college.
- Farmers partnered with the National Council for Social Studies to create the American Promise in 1995.

Company-sponsored mentoring/tutoring

- Through the American Promise, employees volunteer to mentor and tutor students in area schools.

Signature programs

- American Promise is a citizenship educational curriculum and video distributed to schools to enable teachers to teach civic responsibility and enhance student interest in civic issues. Young Americanos is an outreach program to the Hispanic community that builds bridges of communication and understanding and honors Latino culture. “Americanos: Latino Life in the United States” is a traveling exhibition sponsored by Farmers that features 120 photos of Latino life by 30 of the nation's top photojournalists. Y.E.S. is Farmers' signature program that helps communities improve/educate young drivers.

COMPANY STATISTICS

Industry: Information Technology: IBM strives to lead in the invention, development, and manufacturing of the industry's most advanced information technologies, including computer systems, software, storage systems, and microelectronics. IBM translates these advanced technologies into value for its customers through their professional solutions, services, and consulting businesses worldwide.

Headquarters: Armonk, NY

Size: 318,273 employees worldwide

EMPLOYEE VOLUNTEER PROGRAM (EVP) FACTS

Name of the EVP: On November 15, 2003, IBM introduced the On Demand Community, a first-of-its-kind initiative to encourage and sustain corporate philanthropy through volunteering by arming employees and retirees with a rich set of IBM technology tools targeted for nonprofit community organizations and schools. On Demand Community is led and managed through IBM Corporate Community Relations (CCR) by CCR managers at local sites. The new initiative includes a rich portfolio of more than 150 proven technology solutions for schools and nonprofits, plus online training and support materials for IBM volunteers that enrich their community work and link IBM's spirit of volunteering to its on-demand strategy.

EVP scope: Global — On Demand Community enables IBM to engage thousands of employees and retirees on a worldwide basis and give them resources that will transform the schools and community organizations where they donate their time, taking community service to a whole new level. One year after its launch in November 2003, more than 30,000 employees and 4,000 IBM retirees in 67 countries have registered with On Demand Community, sharing their skills and know-how with local organizations.

Date established: A formal commitment to corporate citizenship dates back to the founding of the corporation in 1914.

Number of employees in EVP: 125,000 — This number represents the total number of employees who volunteered for all the projects, so there may be some duplication.

How the EVP is communicated to internal and external stakeholders: The importance of the EVP program is conveyed to IBM board members, shareholders, and employees through human relations, public relations and media efforts, the use of technology, and various publications and reports.

Human Relations: Employee volunteering is a core element of IBM's overall corporate citizenship efforts. The entire IBM management team is encouraged to support employee volunteering, and it does so for individuals and work teams. From their first day of employment, IBMers are introduced to the importance of volunteering and community service. All new hires participate in a two-day Becoming One Voice orientation; a significant part of this orientation includes information on IBM's commitment to the community, with a focus on volunteer programs. New employees receive a special

IBM Employee Partnership Programs brochure that highlights five corporate programs that encourage, support, and reward employee volunteering.

In addition, Individual Development Plans, required for every employee and reviewed with management, frequently include volunteer leadership opportunities as an important skills development component that will enhance career development.

Public Relations: IBM strives to communicate its vision of corporate citizenship, as well as the impact of its efforts, to external stakeholders and to its own employees through a variety of means. Internal employee communications help build morale and strengthen volunteer recruitment and program success. Communicating corporate citizenship efforts externally enhances IBM's image with customers, opinion leaders, and the greater public, and helps attract top-level talent as employees.

In 2003, IBM created a revolutionary new initiative in corporate philanthropy to increase the impact and value of their extraordinary efforts and to inspire even more IBMers worldwide to contribute their time and talents. Called On Demand Community, the initiative provides employees and retirees with on-demand access to IBM technology, resources, training, and support, designed specifically for volunteer efforts in public education and nonprofit organizations. Through the On Demand Community website, these volunteers have access to more than 150 tools — from science presentations for middle-school kids, to a school-based online mentoring program, to technology plans for nonprofit organizations — to support their volunteer activities. This first-of-a-kind corporate program also provides technology grants, cash awards, and reduced prices on hardware and software to eligible organizations where employees and retirees volunteer.

Technology: As one of the leading information technology companies in the world, IBM uses the Internet as a primary tool to reach employees. The IBM Community Relations website (www.ibm.com/ibm/ibmgives), IBM's main website, the On Demand Community website, and electronic collaborative team rooms that feature employee volunteers working on strategic initiatives are all vital portals into the company's philanthropic endeavors for both external audiences and employees. The On Demand Community website in particular delivers a portfolio of proven solutions, tools, and strategies to employees for volunteer projects.

Publications and Reports: IBM's corporate annual report, as well as CCR's semi-annual reports to the corporate board of directors, provides information and feedback about the company's EVP. *The Corporate Social Responsibility Report* provides an integrated overview of the economic, environmental, and social dimensions of IBM's business activities. Other reports such as *Early Learning in the Knowledge Society*, *Reinventing Education*, *Latinos and Information Technology: The Promise and the Challenge*, *School-to-Career Program and Technology*, and the *Best Teachers Guide* were published mainly as a result of forums sponsored or commissioned by IBM, and provide insights into specific issues addressed by IBM's community programs. Newspaper articles and journal reports by and about IBM volunteer managers and employees also give visibility to the EVP.

What are the primary social issues addressed by corporate-sponsored activities? To make the most effective use of IBM resources and expertise, IBM has selected priority issues and key initiatives for investment. Its main focus is education. IBM also provides smaller grants in the areas of adult education and workforce development, arts and culture, and communities in need.

Education: IBM's largest community relation's commitment is to K-12 education. IBM works to promote student achievement and enhance academic productivity by providing technologically innovative programs and partnerships in education globally, including Reinventing Education, IBM KidSmart Early Learning Program, TryScience, and IBM MentorPlace.

Adult Training and Workforce Development: IBM uses cutting-edge technology to improve job training and education programs for adults around the world. Their tools have helped simulate real job conditions, making it easier for people to acquire the skills and support they need to obtain and retain employment.

Arts and Culture: IBM's support of the arts stems from its strong tradition of bettering communities. IBM feels a deep sense of responsibility both inside and outside the company — a focused determination to enhance the communities in which it does business and in which its customers and employees live. By joining with libraries, museums, and other cultural institutions in exciting partnerships that leverage IBM expertise, IBM also demonstrates the critical role technology plays in enhancing the arts.

Communities in Need: Wherever IBM does business around the globe, it forms connections to communities and support a range of civic and nonprofit activities that help those in need. In all its efforts, IBM demonstrates how technology can enrich and expand access to services and assistance.

Supportive Policies and Programs

Management-directed time off

- Days of Caring is an example of this, through which employees can work on IBM-sponsored programs. It is sponsored through the Employee Charitable Contributions (ECC).

Flex-scheduling

- IBM has a workplace flexibility policy that can be used by employees to develop time for volunteer activities while taking into account the needs of the business. Workplace flexibility means varying daily arrival time and arranging work-week hours within limits established by local management to be able to volunteer.

Family volunteering

- IBM encourages volunteers to engage their families in their community efforts through its On Demand Community website (tools are available only to employees).

Matching grants

- IBM matched employee and retiree contributions with \$23.2 million in cash and technology in 2003.

Dollars for Doers	<ul style="list-style-type: none"> ■ IBM's Community Grants program provides cash or equipment grants to nonprofit organizations and schools where IBMers volunteer.
Retiree volunteering	<ul style="list-style-type: none"> ■ Encouraged and sponsored through On Demand Community, retirees participate by contacting IBM's CCR for projects they can work on.
Charitable donations	<ul style="list-style-type: none"> ■ In 2003, IBM contributed \$142.8 million at market value in equipment, technical services, and cash to nonprofit organizations and educational institutions worldwide - an increase of \$2.6 million from 2002.
Employee charitable contributions (payroll deduction)	<ul style="list-style-type: none"> ■ ECC is IBM's formal workplace-giving fundraising effort and generated more than \$32 million for donation to area nonprofits in 2003.
Company-sponsored projects	<ul style="list-style-type: none"> ■ Days of Caring is an opportunity for volunteers to work in teams on various company-supported projects; for example, employees joined forces with Habitat for Humanity to build homes in Bridgeport, CT, and more than 1,600 others participated in team projects in partnership with the local Corporate Volunteer Council in Rochester, NC.
Company-sponsored mentoring / tutoring	<ul style="list-style-type: none"> ■ MentorPlace is IBM's school-based online mentoring program involving more than 5,200 employees in 29 countries. ■ National Engineers Week encourages high school student involvement in engineering and science.
Capacity building / board development	<ul style="list-style-type: none"> ■ Throughout the world, IBM leaders serve on nonprofit, education, and trade association boards. United Way, Chamber of Commerce, Boys & Girls Clubs, and others are examples of where executives offer their expertise and leadership.
Employee Volunteer Recognition Program	<ul style="list-style-type: none"> ■ On Demand Community (ODC) highlights the volunteer efforts of IBMers by showcasing a Volunteer of the Month and presenting how successfully employees have used the On Demand Community resource to make a difference. The Community Grants Program recognizes and encourages the involvement of IBM employees and retirees who volunteer time and talents through ODC.
Skill development through volunteering	<ul style="list-style-type: none"> ■ Resources offered by On Demand Community enable employees to assess their skills and take online training to improve their volunteer ability.

Pitney Bowes

EMPLOYEE VOLUNTEER PROGRAM (EVP) FACTS

“We don't just practice checkbook philanthropy. . . . Our employees are involved in all aspects of their community, freely giving their time, their talents, and their treasure through volunteering and technical assistance.” PB Community Relations statement.

Name of EVP: PB People: Building Stronger Communities

EVP scope: Domestic

Date established: (information not available)

Number of employees in an EVP: N/A — Employees volunteer for the projects they are interested in. During a recent calendar year, the home office's area employees donated over 6,000 hours to 103 projects and 65 charities and nonprofits.

How the EVP is communicated to internal and external stakeholders:

External: Pitney Bowes employs various PR tools to draw attention to the work of their Employee Volunteer Program. They have had numerous citations in noteworthy news journals and received recognition for their volunteer efforts. They were ranked number one in DiversityInc.com's Top 50 Companies for Diversity in 2004, ranked in the 100 Best Corporate Citizens by *Business Ethics* magazine from 2000 through 2004, ranked among *Fortune* magazine's America's Best Companies for Minorities from 1998 through 2004, voted #1 Best Company for Women by *Business Week* magazine, cited for their Progressive Employee Program by Newsweek, named in the Top 10 Companies for Minority Managers by *Minority MBA* magazine, and featured by CNBC news for their diversity initiatives. They credit much of their visibility to the work their employee volunteers do in the communities. Pitney Bowes' website is also a way external stakeholders gain access to information about the Employee Volunteer Program.

Internal: Pitney Bowes employees visit their main website for information on volunteer projects. Through the HR department, employees are made aware of specific tools designed to make volunteering easier, such as the Pitney Bowes Dollars for Doers, Matching Gifts, and Employee Giving programs. Strategic nonprofit board placements are encouraged as a development tool for executives with leadership potential and for senior management as a way of strengthening the company's commitment to the communities in which its employees live and work.

COMPANY STATISTICS

Industry: Mail and Document Management/Office Equipment — Pitney Bowes is the world's leading provider of integrated mail and document management systems, services, and solutions. The \$5 billion company helps organizations of all sizes efficiently and effectively manage their mission-critical mail and document flow in physical, digital, and hybrid formats. Its solutions range from addressing software and metering systems to print stream management, electronic bill presentment, and presort mail services.

Headquarters: Stamford, CT

Size: 35,000 employees

What are the primary social issues addressed by corporate-sponsored activities? Literacy and Education, Cultural Literacy and Diversity, and Community Revitalization are the primary issues addressed by corporate-sponsored activities. With the support of the Pitney Bowes Community Investment Fund, the Pitney Bowes Literacy and Education Fund, and the Pitney Bowes Employee Involvement Fund, employees are encouraged to develop projects that target these areas.

Supportive Policies and Programs	
Matching grants	<ul style="list-style-type: none"> ■ PB provides a 50% match for all employee charitable contributions up to \$50,000 per year annum per employee.
Dollars for Doers	<ul style="list-style-type: none"> ■ By providing Individual Recognition Grants and Team Project Grants as incentives, employees can earn money for charities of their choice by volunteering their time.
Fund for community service	<ul style="list-style-type: none"> ■ The PB Literacy & Education Fund was established for projects that leverage employee efforts to increase literacy, educational success, and diversity in communities. The PB Employee Investment Fund is used to support employee-generated donations such as Dollars for Doers and the 50% Matching Gifts program. In 1992 the PB Relief Fund was established in response to the effects of Hurricane Andrew and is a program whereby employees can support others in need including other employees.
Employee charitable contributions (payroll deduction)	<ul style="list-style-type: none"> ■ The Annual Employee Giving Campaign raises money for nonprofits and charities including the United Way, Earth Share, and other 501(c)(3) organizations.
Partnerships	<ul style="list-style-type: none"> ■ PB is in partnership with the Points of Light Foundation & Volunteer Center National Network to develop and strengthen their employee volunteer initiatives.
Company-sponsored projects	<ul style="list-style-type: none"> ■ Make a Difference Day is PB's company-sponsored semi-annual neighborhood cleanup project; the Annual Diversity Festival celebrates global diversity and highlights the "Community Around Us."
Company-sponsored mentoring/tutoring	<ul style="list-style-type: none"> ■ Through the PB Literacy and Education Fund, Pitney Bowes sponsors projects that foster mentoring and tutoring to enhance literacy and education.

COMPANY STATISTICS

Industry: Property and Casualty Insurance — Safeco Insurance, in business since 1923, is a Fortune 500 property and casualty insurance company based in Seattle, WA. The company sells insurance to drivers, homeowners, and small- and medium-sized businesses through a national network of independent agents and brokers. Across the country, Safeco supports and partners with nonprofit organizations that bring people together to create strong, safe, and vibrant neighborhoods.

Headquarters: Seattle, WA

Size: 10,000 employees

EMPLOYEE VOLUNTEER PROGRAM (EVP) FACTS

“Implement, measure, and increase awareness of Safeco community relations strategies that support business objectives and meet community, customer, employee and investor expectations for good corporate citizenship.” - Safeco's community relation's department mission.

Name of the EVP: Strengthening Neighborhoods

EVP scope: Domestic — Sixteen employee-run Community Involvement Committees (CICs) overseen by Safeco Corporate Community Relations and located across the country. CICs are composed of a volunteer chair or co-chairs and 10 volunteer members responsible for organizing volunteer projects for groups of employees. The EVP also matches employee gifts of time and money, promotes individual volunteerism, offers opportunities to select volunteerism as part of their individual development plan, and allows for paid time off to volunteer.

Date established: 1980, with volunteer CICs that then expanded to a comprehensive program that encourages individual and group activities.

Number of employees in an EVP: N/A — 2,800 employees (28%) volunteered in 2004.

How the EVP is communicated to internal and external stakeholders: Safeco Insurance has strategic methods for communicating the importance of their EVP to external and internal stakeholders.

Externally: Safeco releases stories to the media that highlight the activities and achievements of the Safeco EVP. Information on the EVP is given in the corporate annual report, goals for corporate citizenship are presented annually, and accomplishments are reported quarterly to the board of directors.

Internally: Monthly articles are run in the online employee newsletter that is published twice a week. An extensive intranet site promotes the company's support for volunteerism. All employee CEO broadcasts emphasizing volunteerism are sent bi-annually and posters located in all Safeco buildings further enhance the message. In an annual survey, employees are asked to rate Safeco on volunteer support, and the board uses this survey as part of its annual CEO evaluation. In 2004, 53% of employees said they were more committed to the company because of the EVP. The intranet is also a resource for employees to find volunteer opportunities and new programs.

What are the primary social issues addressed by corporate-sponsored activities? Safeco's primary social focus is on supporting economic development and safety and helping neighborhoods flourish and thrive. They address these issues through grants to nonprofit organizations; initiatives such as Neighborhood Matters!™, Play Ball, and Women & Money; and volunteerism.

Supportive Policies and Programs

Management-directed time off and Release time	<ul style="list-style-type: none"> ■ Safeco employees can take paid time off anywhere from a half day for a one-time project to two hours a week for an ongoing commitment to volunteer. The amount of time is based on employee/manager agreement and business need.
Family volunteering	<ul style="list-style-type: none"> ■ Family and friends are welcome to join in Safeco volunteer activities.
Matching grants	<ul style="list-style-type: none"> ■ Safeco's matching grants program, Your Gift Plus, supports employee donations with cash grants. Donations of \$25 or more are matched up to \$500 per employee per annum.
Dollars for Doers	<ul style="list-style-type: none"> ■ Your Time Plus is the company policy that matches 25 employee volunteer hours with \$250 per year, per organization.
Charitable donations	<ul style="list-style-type: none"> ■ Safeco contributes millions of dollars annually to various charities.
Fund for community service	<ul style="list-style-type: none"> ■ Safeco Community Grants fund programs that promote economic development and safety and help neighborhoods flourish and thrive.
Employee charitable contributions (payroll deduction)	<ul style="list-style-type: none"> ■ Through the annual employee giving campaign, employees are able to support nonprofit organizations through payroll deduction.
Company-sponsored projects	<ul style="list-style-type: none"> ■ Safeco annually supports Rebuilding Together's project day in April. The company also supports an annual Day of Caring in the fall, and in 2004 over 1,100 employees participated.
Company-sponsored mentoring/tutoring	<ul style="list-style-type: none"> ■ Employees mentor and tutor students through the company's partnership with Junior Achievement.
Signature program	<ul style="list-style-type: none"> ■ Strengthening America's Neighborhoods
Partnerships	<ul style="list-style-type: none"> ■ Safeco Insurance entered into a national partnership with the YMCA to create vibrant, safe neighborhoods and strong kids. Community service is a component of the partnership.
Employee Volunteer Recognition Program	<ul style="list-style-type: none"> ■ Three volunteers every year are recognized by the CEO and Senior Leadership Team and are formally awarded Community Service Awards at a ceremony hosted at a Seattle Mariner's baseball game in the Safeco suite. They are given \$500 and a commissioned glass award as well as \$500 for the nonprofit of their choice. Beginning in 2003, spot bonuses ranging from \$50 to \$2,000 were made available to managers to recognize employees for outstanding commitment to the community. Small incentives such as T-shirts and hats are given for participation in single projects.
Skill development through volunteering	<ul style="list-style-type: none"> ■ In 2002, Safeco launched Building Business Skills Through Volunteerism, which offers employees and managers a matrix of volunteer opportunities that coincide with Safeco's established set of core competencies to enhance career-building skills through volunteering. Community Involvement Chair and United Way Campaign Committee Chair are examples of internal roles that managers may seek out as a tool for developing leadership in employees.

Appendix B.

Interview Script

1. Can you tell us in your own words a little bit more about your EVP?

- a. How long have you been in your current position?
- b. Do you participate in your company's EVP? If not, why?

2. Why do you think your company has an EVP?

3. How, if at all, do you see the company's EVP impacting the work you do in HR?

4. In relation to your HR department, what do you consider to be the EVP's most valuable contribution?

5. How do you think HR is supported by your EVP?

- a. Does employee volunteering help you recruit better employees?
- b. Does employee volunteering help you retain employees?
- c. Do employees develop skills in their volunteering efforts that are transferable to your workplace?
- d. What types of specific skills and/or competencies are you seeing employees develop through the EVP?
- e. Are there other ways this contribution might be more effectively attained than through the EVP?

6. What do you think EVPs could contribute to HR?

- a. Why is that valuable?
- b. How would you structure an EVP to achieve this contribution?

7. What particular outcomes resulting from an EVP would be most meaningful to you in your HR efforts?

- a. How would you measure these outcomes?

8. Is there any sort of measurement system in place currently to document the impact employee volunteering is having on variables you would consider related to HR?

If **yes**:

- a. What are these measures?
- b. Who is responsible for collecting this information?
- c. What data are being collected?
- d. How do you use this information to inform your work?

If **no**:

- a. What would you most like to know about the benefits of employee volunteering?
- b. How would you use this information to inform your work?

9. Strictly in terms of HR, is the EVP valuable to your company?

- a. If **yes**, why?
- b. If **not**, what sorts of evidence would convince you that the program was indeed of value?

Appendix C.

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We gratefully acknowledge the following interview participants:

Deloitte & Touche USA LLP (Deloitte)

Farmers Insurance

IBM

Pitney Bowes

Safeco



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