



Volunteer Connections:

The benefits and challenges of employer-supported volunteerism

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Canada

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Introduction

The number of volunteers who are employed is on the rise in Canada. Since the time when the 1997 National Survey of Giving, Volunteering and Participating (NSGVP) was conducted, even more employed Canadians have come forward to volunteer their time, skills and energy. How many more? In 1997, 65 per cent of all volunteers were employed.¹ In 2000, new NSGVP data reveal that the number of employed volunteers has risen to approximately 67 per cent.²

Within this spirit of giving, a new and exciting trend is emerging. Increasingly, Canadian employers are lending their support to volunteer activity through employer-supported volunteerism. Statistics from the NSGVP 2000 demonstrate that corporate Canada's interest in volunteerism as a force for good and an opportunity for development is growing. For instance, from 1997 to 2000, the number of employed volunteers who reported receiving approval from their employer to modify their work hours in order to volunteer rose from 22 per cent to 27 per cent.³ There was also an increase in the number of employed volunteers who were recognized by their employer for their involvement in various volunteer activities. Among employees who volunteered in 1997, 14 per cent said they had received recognition from their employer for their volunteer work, compared with 22 per cent in 2000.⁴

Before going any further, let's define employer-supported volunteerism. The term refers to a continuum of employer support for employee volunteer activities. It describes a company that voluntarily supports its employees' involvement in the community. Typically, employer-supported volunteer initiatives (ESVIs) are integrated into the workplace and involve various levels of employer involvement and expenditure.

This growth in employer support for volunteering has gone to good use. In recent years, the not-for-profit sector has benefitted from ESVIs initiated by employees or their employers. But more can be done to encourage and maximize this wealth of volunteer energy. The opportunity is ripe for not-for-profit organizations to engage Canadian companies beyond the act of giving money. And companies *are* coming forward to offer more than sponsorship. They are adding the time and talent of their employees to the arena of community support.

¹ Statistics Canada. *Caring Canadians, Involved Canadians: Highlights from the 1997 National Survey of Giving, Volunteering and Participating* (Ottawa: Minister of Industry, 1998), p. 39. To download the full report, please go to www.nsgvp.org/n-r1-ca.pdf.

² Statistics Canada. *Caring Canadians, Involved Canadians: Highlights from the 2000 National Survey of Giving, Volunteering and Participating* (Ottawa: Minister of Industry, 2001), p. 47. To download the full report, please go to www.nsgvp.org/n-2000hr-ca.htm

³ Ibid.

⁴ Ibid.

By implementing ESVIs, companies can receive recognition for financial contributions, be recognized as good corporate citizens, and get involved in a way that creates healthier communities. Add to this the fact that ESVIs enhance employees' skills and offer not-for-profits a vast pool of skilled volunteers, and you can see why employer-supported volunteerism is a win-win opportunity for not-for-profits and for the workplace.

Establishing a connection between not-for-profits and companies, along with their employees, will lead to new understanding about giving to community, and will generate fresh attitudes about who can be involved in meeting community needs and how this can be done. Although the workplace is poised for this kind of involvement, companies need to be educated on how employer-supported volunteers can contribute to the many goals of the not-for-profit sector. Voluntary organizations can lead in this education by stepping forward with a plan that will bring people together to work for change.

Volunteer Connections: The benefits and challenges of employer-supported volunteerism addresses the impact, opportunities and challenges that not-for-profits face when they involve employer-supported volunteers. It is also designed to teach voluntary organizations how to understand, and respond to, the emerging trend of employer-supported volunteerism. This manual offers ideas, tips and strategies on how not-for-profits can incorporate employer-supported volunteers into their operations, and consider the benefits and challenges of including Canadian companies in a vision of giving. It also presents many questions that each not-for-profit must consider in light of its own needs and goals.

"Distinctive relationships are replacing cheque book philanthropy, and are involving key stakeholders of both not-for-profits and companies, engaging corporate employees in the mix, sharing knowledge and expertise held by both partners, and moving toward alliances focused on solutions for community issues that are of mutual concern."

Martha Parker
Partnerships: Profits and Not-for-Profits Together

A Background to Employer-Supported Volunteerism

Employer-supported volunteerism began to emerge through employee volunteer programs some 20 years ago. The term “employee volunteerism” generally refers to employees who are involved in voluntary activities through their workplace. Even though many employers support their employee volunteers through various means of recognition, employee volunteerism is almost always employee driven and directed, done on employees’ own time, and characterized by lower levels of employer support for employee involvement in the community.

In 1980, most of the 2.7 million Canadians who volunteered were women who were not in full-time jobs. By 1986, a Conference Board of Canada survey of 1,000 companies identified a rising trend in employee volunteerism and called it an important new force in Canadian society. Of the companies surveyed, most reported that their employees were involved in community-wide volunteer activities (such as the Canadian Red Cross and the United Way), or that their employees were carrying out specific volunteer activities, such as fundraising, for a particular cause (for example, a hospital).⁵

While evidence was strong that employees had initiated most of the volunteer activity in the workplace, evidence was equally strong (93 per cent) that employers encouraged and supported these activities to varying degrees. At that time, researchers assessed companies’ written volunteer policies according to whether they were:

- encouraging — made positive statements about the value of volunteering but had no guidelines for matching volunteer work to employees’ responsibilities;
- enabling — provided some guidelines on how to implement corporate goals through volunteer activities; or
- promoting — did not include the employer in the voluntary activity but recognized the overlap of volunteer and paid work, and rewarded employee volunteer achievement.

More than half of the organizations surveyed considered volunteer experiences when hiring, stating that this experience was viewed as evidence of the right sort of attitude in the candidate. Although most of the companies surveyed had never actively matched employees with voluntary organizations and opportunities, some said they would consider such practices in the future.

The 1986 survey on employee volunteerism showed that the corporate sector in Canada was moving toward new and promising practices of volunteer involvement. Researchers observed that Canadian employers were becoming interested in playing a “clearing

⁵ Conference Board of Canada. *Employee Volunteerism: Employer practices and policies* (Ottawa: Conference Board of Canada, 1986).

house” role (that is, formally matching employees with volunteer organizations or initiatives), and that Canada seemed to be moving toward the development of a supportive infrastructure for such practices. Gradually, volunteer and networking councils were appearing on the landscape. Their role: to figure out how community members could work together to meet community needs.

Another major study, conducted in 1995, revealed continuing support for employee volunteerism.⁶ By 1995, almost 24 per cent of companies surveyed had established volunteer policies for the workplace, compared with six per cent of companies in 1986.

In the 1995 survey, researchers reviewed workplace policies and practices, and identified active and passive support mechanisms for employee volunteerism. Active support from the employer included such mechanisms as featuring volunteer appeals in company newsletters and allowing volunteer fairs on company premises. Forms of passive support for employee volunteerism included employer approval of company facilities and equipment for volunteering done on the employees’ own time.

Under active support, 65 per cent of the companies surveyed supported employee volunteering, and 70 per cent encouraged company executives and staff to serve on boards of directors of voluntary organizations. Under passive support, between 60 and 70 per cent of companies allowed employee volunteers to adjust their work schedules, take time off or leave/absence without pay, and use company facilities for their volunteer activities.

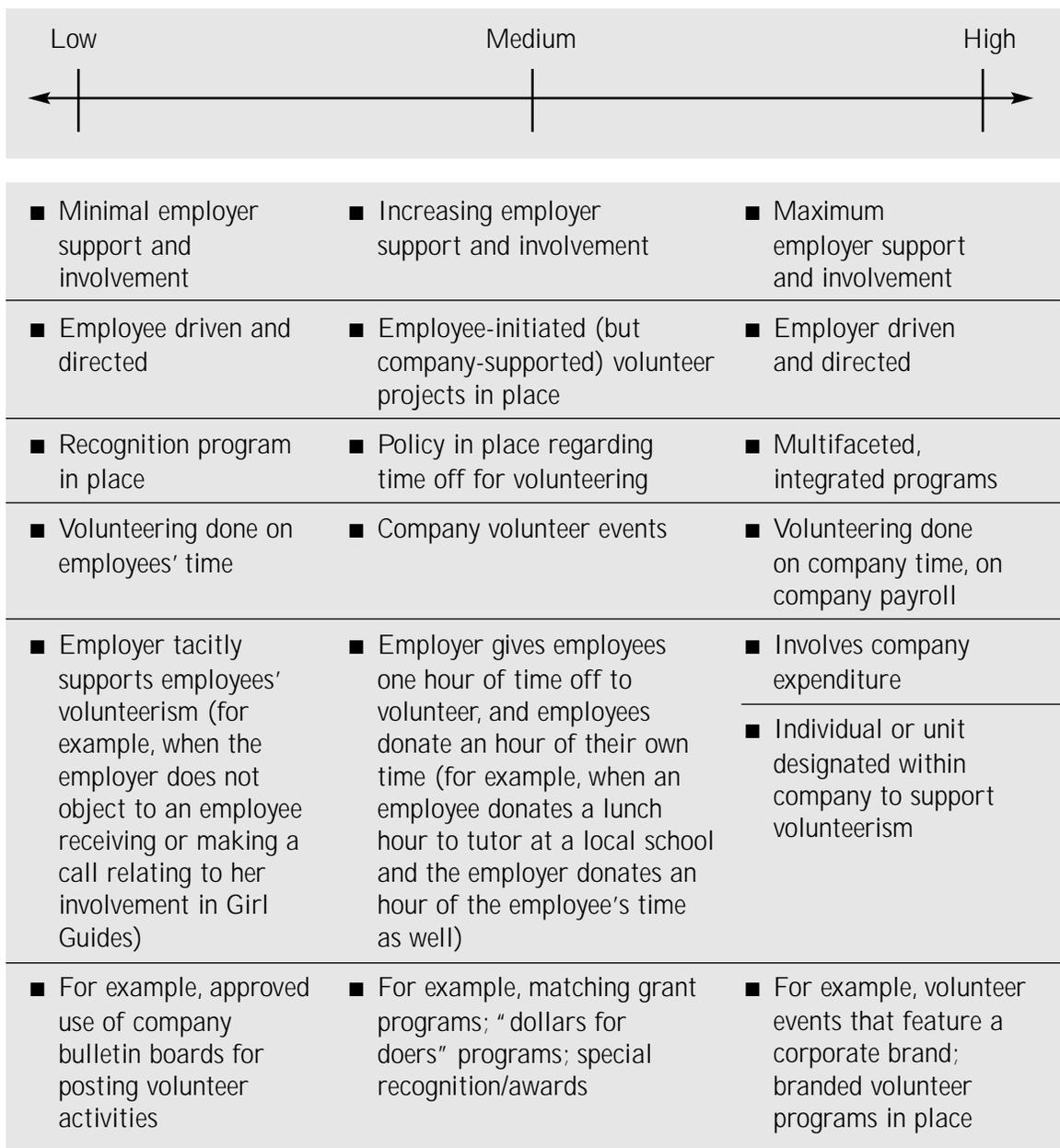
These survey results suggest that a vibrant attitude of giving has flourished in the Canadian workplace since the 1980s. Now, 20 years on, the enabling environment that nurtured the growth of employee volunteerism has prepared the ground for a new trend. As more and more employers are adopting the view that socially responsible business practices benefit both companies *and* the community, an interest in employer-supported volunteerism is emerging.

⁶ Janet Rostami and Michael Hall. *Employee Volunteers: Business Support in the Community* (Toronto: Canadian Centre for Philanthropy; Ottawa: Conference Board of Canada, 1996).

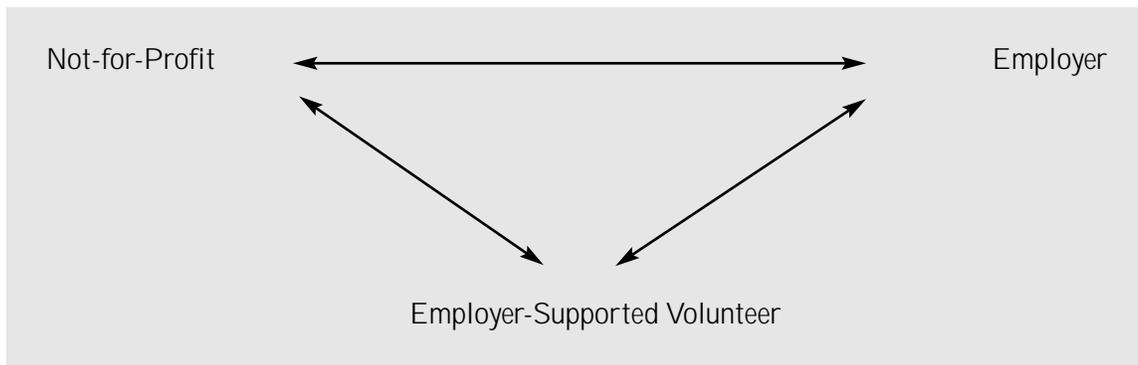
What is Employer-Supported Volunteerism?

Although every workplace will offer a different level of support to its employee volunteers, the typical employer-supported volunteer initiative (ESVI) involves employer support and involvement that range from low to high.

THE CONTINUUM OF EMPLOYER-SUPPORTED VOLUNTEERISM



Employer-supported volunteerism also describes a three-way relationship between the not-for-profit organization, the employer and the employer-supported volunteer. This relationship can be illustrated as follows:



Regardless of the kind or level of support, with a little planning, not-for-profit organizations can tap into this emerging trend.

REALIZING THE BENEFITS OF EMPLOYER-SUPPORTED VOLUNTEERISM

In the mid-1980s the primary reason given by the private sector for sponsoring a volunteer organization or cause (through cash, in-kind donations, or employee resources) was to demonstrate a commitment to corporate philanthropy. Yet by the mid-1990s, the private sector had shifted from a purely philanthropic view of community involvement to a more inclusive vision of corporate social responsibility (CSR). Companies recognize that they should be involved in the community for several good reasons:

- businesses get so much from the community that they want to give something back;
- businesses want to be seen as being aware of CSR — a concept that is creating a new standard for business.⁷

Increasingly, companies are finding that employer-supported volunteerism is an integral part of any CSR program. Employers surveyed in 1995⁸ identified the following top five qualitative reasons for encouraging employer-supported volunteerism:

1. improved relations with surrounding community;
2. improved corporate public image;

⁷ The Web site of the Conference Board of Canada identifies CSR as a significant business issue of the 21st century, and provides detailed research findings on this topic. For more information, visit www.conferenceboard.ca/ccbc/csr_topic

⁸ Rostami and Hall. *Employee Volunteers: Business Support in the Community*.

3. increased health of community;
4. improved sense of self-worth among employees; and
5. improved people skills among employees.

Interestingly, survey responses showed that employers placed less emphasis on the quantitative benefits derived from employer-supported volunteerism. Some of these quantitative reasons were:

1. increased employee job performance;
2. improved retention of employees;
3. reduced absenteeism;
4. management initiatives that enhance performance;
5. improved recruitment of new employees; and
6. improved communication among various departments of the company.

By combining CSR with employee development, employer-supported volunteerism contributes to the health and happiness of individuals and communities, and creates a vibrant social and economic environment for conducting business. What employer wouldn't want to tap into the benefits derived from employer-supported volunteerism and contribute toward such rewards?

GETTING RETURN ON INVESTMENT

Employer-supported volunteerism offers alternate ways for companies to pursue their operational goals. Not only does initiating an ESVI make good business sense, it also offers returns from a human resources perspective (that is, improved recruitment and retention of employees).

Considering the costs of undertaking volunteer initiatives in the workplace (that is, maintenance of facilities and equipment, expenditure of employee time and payment of wages), it's obvious that both CSR and return on investment are motivating factors for employer-supported volunteerism.

“ Clarica’s volunteer program advances strategic business goals and significantly increases employee productivity, employee teamwork skills and improves Clarica’s public image. We believe our responsibility as a corporate citizen goes beyond business performance to community involvement. Investing in communities makes us a stronger company — that’s why we recognize and celebrate employees across Canada who volunteer to make their communities better places to live.”

Judith Chopra
Public Affairs Manager, Clarica

Although statistics demonstrate that Canadian companies are becoming increasingly involved in their communities, more can be done to encourage the growth of employer-supported volunteerism. In 1995, 23 per cent of the workplaces surveyed reported having a formal volunteer policy as part of their human resources package.⁹ Yet, only 13 per cent of these workplaces had developed ESVIs or were interested in recruiting and referring employees as volunteers to specific community volunteer projects.

Throughout this manual, examples and case studies testify to the commitment of employers and employees to meeting their communities’ needs. What remains is for the not-for-profit sector to maximize the potential of this trend. With the help of *Volunteer Connections: The benefits and challenges of employer-supported volunteerism*, not-for-profits can take a leadership role in building relationships with companies and their employer-supported volunteers.

⁹ Rostami and Hall. *Employee Volunteers: Business Support in the Community*.

Why Build Relationships with Employers and Their Employees?

There are many benefits to be gained by building partnerships between not-for-profits and employers and their employees.

BENEFITS TO THE NOT-FOR-PROFIT

By building relationships with employers and their employees, the not-for-profit sector can benefit in many ways. Some of these benefits can include:

- a broader pool of skilled and focused volunteers to recruit from;
- an influx of new ideas and approaches to problem solving and meeting community needs;
- the potential for long-term retention of employer-supported volunteers;
- the possibility of philanthropic support through cash and in-kind donations;
- broad-based employer support for programs and services; and
- an alliance with corporate partners who will lobby for your cause.

In many ways, recruiting employer-supported volunteers is similar to recruiting any other volunteers. Most people volunteer because they want to help others, to help a cause they believe in, to gain a sense of accomplishment and enjoyment, or to use or gain skills and experience. Nevertheless, there are challenges to consider when recruiting or working with volunteers associated with a corporate program. By knowing the profile of the average employer-supported volunteer, you will better understand these challenges and benefits.

BENEFITS TO EMPLOYER-SUPPORTED VOLUNTEERS AND EMPLOYERS

Although Canada's 6.5 million volunteers come from all backgrounds, the 2000 National Survey of Giving, Volunteering and Participating (NSGVP) found that 67 per cent of them were employed and 39 per cent had a university education.¹⁰ This may indicate that the skills and knowledge base of today's employer-supported volunteers are indeed high and diverse. A large percentage of employer-supported volunteers reported gaining the following benefits from volunteering:

- interpersonal skills—understanding people better, motivating others, dealing with difficult situations;

¹⁰ *Caring Canadians, Involved Canadians: Highlights from the 2000 National Survey of Giving, Volunteering and Participating*, p. 33.

- communication skills—public speaking, writing, conducting meetings, and public relations;
- managerial skills;
- technical or office skills;
- short-term and long-term planning skills;
- survival skills—stress management, setting personal priorities;
- varied knowledge;
- fundraising skills; and
- accountability and assessment planning.

Additionally, many employer-supported volunteers reported that volunteering had contributed to their overall workplace success.

Employees aren't the only ones benefitting from volunteering: employers are getting returns on investment as well. By adding people to the equation, employer-supported volunteerism takes the act of sponsorship (including cash and in-kind donations) to a new level of involvement and a new level of caring in the community. Employer-supported volunteerism benefits companies by:

- improving public image;
- improving relations with community groups, the public and employees;
- creating a healthier economic and social environment; and
- improving employee morale, productivity and loyalty.

A Three-Way Win!

Suncor Energy is a Canadian company committed to contributing to the communities where its employees work and live. The result of their efforts is a three-way win among Suncor Energy, its employees and the community. Suncor's Calgary-based, employee-driven corporate volunteer team, called the "We Care Connection," has connected more than 120 Suncor volunteers to more than 20 not-for-profit organizations — involving over 2,000 hours of employee time since November 1999.

"We encourage Suncor employees to bring forth new opportunities for our support.

Recognizing that volunteer opportunities are limitless in our community, we have developed and communicated clear criteria to govern our evaluation of new opportunities referred to as the "We Care Connection." We ask that there be a clearly defined opportunity which seeks to meet a social, educational or environmental need and, ideally, that there be at least one Suncor employee involved as a volunteer with an organization seeking our support."

Greg MacGillivray

Co-chair for the We Care Connection Committee, Suncor Energy

We recognize that companies want to be involved in employer-supported volunteerism, and know that employees are already getting involved in this emerging trend. If your voluntary organization has not yet started to access this wealth of available volunteers, then it's time to consider a strategic approach.



A Strategic Approach

This section of the manual gives you tips and strategies to help you build relationships with potential employer partners, or enhance a corporate relationship that your not-for-profit organization already has.

Eight Steps to Involving Employers and Employer-Supported Volunteers in Your Voluntary Activities

Step 1: Prepare Yourself and Your Organization

Step 2: Establish Your Goals and Needs

Step 3: Research Your Options

Step 4: Plan and Make “The Pitch”

Step 5: Establish the Relationship

Step 6: Engage Employees as Volunteers

Step 7: Recognize Employers and Employer-Supported Volunteers

Step 8: Evaluate Your Efforts

STEP 1: PREPARE YOURSELF AND YOUR ORGANIZATION

Volunteerism is at the core of your organization and volunteers are central to the way you work to achieve your mission. Why not plan new kinds of volunteer involvement by encouraging your organization to launch an employer-supported volunteer program (ESVI)?

To ensure that your organization will support the plan, include an ESVI in your annual volunteer management work plan. Start by asking the following questions:

- How might an ESVI fit within our organization’s mission and current fundraising/operating plan?
- What will our organization have to do to get ready? Do we need a new policy?
- Who will be responsible for developing an ESVI in our organization? Who else in the organization needs to be involved?
- Does our organization know what type of business we want to align with?
- What, if anything, will engaging employer-supported volunteers cost us?

When considering how planned employer-supported volunteerism can become part of your operations, involve your own experts right from the start:

- Include a board member, the executive director, the fund development manager, and any other appropriate team members in the discussions.
- Present the concept to your board for buy-in.
- Have those responsible for policy review examine the proposal and endorse the overall direction.

Any new policies relating to the development of an ESVI must have board approval.

Based on the results of the *2000 National Survey on Giving, Volunteering and Participating*, the best way to recruit volunteers may be to ask and ask again, be flexible, and acknowledge that volunteers' time is a precious commodity — so use it wisely.

1.1 Develop Written Policies

Developing written policies for partnering with employers will give your not-for-profit organization guidelines and standards from which to operate. This preparedness will also present a professional image to the companies you will contact. Remember that written policies can be as simple or as detailed as you need them to be. You may want to allow for some flexibility to accommodate the circumstances of a corporate partnership. As well, decide which of your policies and guidelines are non-negotiable and which you are willing to adjust. Finally, you might consider establishing a set of principles or a position statement on employer-supported volunteerism.

A written policy for partnering with employers can outline:

- a profile of an appropriate partner;
- risk and liability for both parties;
- cost-sharing of projects;
- a publicity agreement;
- conflict-of-interest rules; and
- the legal implications of a partnership.

One Person / One Day Makes a Difference

MDS Nordion believes that one day can make a difference. To celebrate the International Year of Volunteers in 2001, the company has instituted a program in Canada to encourage volunteerism. The program gives employees the opportunity to take one paid day per year to perform community service. Employees may choose to spend this time by assisting a favourite charity or participating in a community-improvement initiative.

"MDS Nordion's employees care deeply about the communities in which they live and work. From supporting the annual United Way to participating in the MDS Nordion 10-km run each May, our employees demonstrate their pride in and commitment to the community."

David McInnis

Vice-President, Corporate Communications, MDS Nordion

Preparing your organization to include employers and employer-supported volunteers may require some adjustment to your current volunteer program. Review your practices and organizational structure to see how employers and employees could best be integrated into the things that you do.

Tip

Relationships that stand the best chance of success are those that are mutually beneficial. A successful ESVI will provide the not-for-profit organization with outside expertise, and will give the employer-supported volunteer an opportunity to contribute in a meaningful and visible way.

STEP 2: ESTABLISH YOUR GOALS AND NEEDS

Prepare to establish your goals and needs by reviewing your organization's annual operating plan or work plan. Consider which activities planned for the year will require significant volunteer recruitment efforts, and which businesses you might be able to approach for support. Meet with staff from your various departments or projects and ask them for specifics about their volunteer needs for the coming year. Prepare the volunteer needs assessment in the same way you would prepare any new volunteer position (that is, write position descriptions and determine training requirements).

The next step is to go beyond the goals of your organization's work plan, and get creative. Meet with staff involved in various programs, and have a brainstorming session about their plans. Together, think of other things that volunteers could do to enhance

those projects. Since most programs face some cuts during an organization's budgeting process, have staff revisit their draft work plans to see if volunteers could help move forward initiatives that would otherwise be temporarily shelved. This step lets you create a wish list of potential volunteer activities for the year to come. You can refer to this wish list when companies call your organization looking for an employer-supported volunteer opportunity.

Through ESVIs, you can enhance your volunteer recruitment efforts and explore the ways in which employer-supported volunteers could be involved in your organization. To determine how best to include employer-supported volunteers in your volunteer program, consider the following questions:

- Might current positions be divided up and shared among volunteers?
- Can positions be combined and then carried out using a team approach?
- Are there aspects of existing, long-term activities that could be broken down into smaller tasks, without compromising continuity?
- What are the current demographics of your organization's volunteer program? Where do your volunteers come from? Are they engaged in your organization as long-term or short-term volunteers?
- What are your clients' the current and future needs?
- Who are your current corporate supporters? Are they interested in becoming more involved in your organization? Could you propose a value-added piece to their existing support by inviting their employees to get involved?
- What skills and competencies does your organization lack that employer-supported volunteers could provide?
- How could you enhance the skills of employer-supported volunteers and move your organization forward at the same time?

Not-for-profit organizations should be confident in asking for the best people and the best skills that an employer has to offer. Plan to strategically align your not-for-profit with a company that has the competencies to meet your needs.

Translation? Match the skills of employer-supported volunteers with your organization's requirements.

Consider the following scenario:

An employer calls you on short notice and says: “ We have 500 employees and we want to do a charity day on May 1.” The employer also requests that the volunteer event offer a teambuilding opportunity for their employees. If your organization has *not* yet determined how best to involve employer-supported volunteers in your volunteer program, you might react by choosing a need and mobilizing the employees to do the work. Although this choice could result in a satisfying initiative for all involved, you can act more strategically if you establish your goals and needs first. There’s no doubt that teambuilding and morale boosting is valuable, but we know from research that it is more often the ‘skills trade’ aspect of the volunteer experience (that is, using and gaining special skills) that employer-supported volunteers find most rewarding.

Lastly, not-for-profit organizations must learn to say no to some offers of employer support. By doing so, not-for-profits can do a better job of focusing their own limited human resources management capacities on what matters most: building ESVIs that promote strategic, long-term relationships with workplaces. It may be appropriate or even necessary to say no when:

- your organization does not have the infrastructure to support the employer’s request;
- your organization and the employer have incompatible missions or goals; or
- the event turnaround time is too short.

Appendix A contains case studies of Santropol Roulant (SR) in Montréal and The Children’s Wish Foundation (CWF) in St. John’s, Newfoundland. These studies demonstrate how important it is for an organization to establish clear goals.

SR, a youth-run community organization, first turned to multimedia companies in its search for youthful employee-volunteers. In the end, SR realized that its most urgent need was not more volunteers but a professional communications strategy. Currently, SR is in the process of building relationships with local communications and design firms, and exploring how these companies can help SR get its message out.

The Children’s Wish Foundation (CWF) in St. John’s knew it wanted to partner with a small computer company that would offer personalized computer services to children and their families. By establishing clear goals, CWF found an excellent match in Prima Computer Solutions, Inc., a small local supplier with five dedicated employer-supported volunteers.

Instead of being *reactive* — scrambling to respond to a company's offer of support — be *proactive*: identify your organization's goals and areas of need, and locate appropriate employer partners.

STEP 3: RESEARCH YOUR OPTIONS

Now that you've completed your needs assessment and understand the skills and expertise you require, it's time to turn to your community and target the companies you want to strategically partner with.

3.1 Strengthen Current Relationships

The first place to start is with your own list of corporate sponsors. Do opportunities exist to establish a different kind of relationship with your past and present sponsors? Before you contact any of these companies, however, you will want to talk to the person in your organization who is responsible for fundraising. This individual already has a relationship with your corporate sponsors, so coordinate your outreach and plan your alignment strategy together. By doing so, you can present a professional image to your sponsors. A professional image is important because it helps to convince your potential employer partner that you are competent, prepared and can deliver on the partnership.

3.2 Look for Existing Contacts

Discuss your search for corporate sponsors with your executive director and your board members and other key volunteers. Your internal sources are an excellent place to begin looking for potential business partnerships. Since these individuals are active members in their community, they can likely suggest which businesses to approach, and might be able to give you an informal introduction to a potential contact — a foot in the door.

3.3 Identify Potential Employer Partners

Decide if you are looking for an employer partner with an established volunteer program. Typically, this type of employer designates an individual to oversee the program. If an employer does not yet have a volunteer program in place, be prepared to provide them with information and support on how to establish one.

When researching new companies to partner with, narrow your search field to include only those organizations that have met your partnership criteria. For determining criteria, keep in mind that the partnership between your organization and the company should be a mutually beneficial one. As well, ask yourself if the company's ESVI would be a good match with your organization's own goals and employer-supported volunteer projects.

3.4 Establish a Profile for an Employer Partner

By establishing a partnership with a company, you are aligning yourself with another organization's history and reputation. Make sure you determine in advance that the employer partner meets your standards as an outstanding corporate citizen. For example, not-for-profit organizations that work in the environmental sector would want to ensure that the company they approach is committed to environmental principles. On the other hand, your goal may be to partner with a company in order to raise its level of corporate social responsibility. Either way, make sure you know the company's business history and practices *before* you start to work with them.

Your organization may already have a list of companies that, through either reputation or sector of involvement, do not meet your standards. Make sure your executive director or communications department knows which companies you are planning to approach. For instance, if your volunteer activities are health related, you might be cautious about forming alliances with pharmaceutical companies. If your volunteer activities involve youth, you will probably want to avoid forming alliances with tobacco firms. Always research your potential employer partner's background. This will ensure that the company you approach is not affiliated with, or a subsidiary of, a firm your organization does not want to have as a partner.

Be honest with your potential employer partner about your organization's needs and goals. Even if a partnership is not currently timely, there may be opportunities for future alignment.

3.5 The Continuum of Employer-Supported Volunteerism

Even though employers have supported workplace volunteerism since the early 1980s, the number of companies that have actually implemented formal employer-supported volunteer policies and initiatives is still small — but it is constantly growing. As a result, the time is ripe for not-for-profit organizations to demonstrate their leadership and expertise in the field, while strengthening the concept of volunteerism and community participation among employers.

When collaborating with an employer partner on an employer-supported volunteerism initiative, keep in mind that ESVIs are as varied as the businesses themselves. The continuum of employer-supported volunteerism (see “What is Employer-Supported Volunteerism?” near the beginning of this manual) clearly demonstrates the range of employer involvement and support in these initiatives. Don't be surprised if some companies, such as Suncor's “We Care Connection,” have a formal volunteer mandate and a full brand identity in place, while other companies have only minimal employer involvement, relying almost entirely on the drive and direction of their employees for initiating volunteer projects.

Did You Know?

Many large companies offer “dollars for doers” programs. These programs offer financial support to organizations where employees volunteer their time.

Manulife Financial has an Employee Involvement Fund called “Helping Hands. Employees.” Staff who contribute at least 40 hours per year to a voluntary organization can apply to the fund to have a \$500 cash grant donated to the organization.

This kind of initiative demonstrates one of the possible long-term advantages associated with ESVIs. Not only can not-for-profits reap the benefits of the employees' expertise and time, but also there may exist opportunities for broadening the relationship with the employer to include cash and in-kind donations. By providing employees with learning opportunities and rewarding volunteer experiences, not-for-profits can nurture powerful corporate advocates and supporters.

See Appendix B for research tips and techniques.

Here are more examples of formal ESVIs developed by Canadian companies:

Canada Post: Heritage Club

Enbridge Inc.: Volunteers in Partnership

General Electric Canada: ELFUN

Home Depot: Team Depot

Suncor: We Care Connection

Canadian Telephone Companies: Telephone Pioneers

Air Canada (Canadian Airlines): PROP (Proud Retirees Offer Positive Support)

3.6 Partner with Other Not-for-Profit Organizations

Your goals may be big, and the employer-supported volunteer initiative you envision may be ambitious in order to meet pressing community needs. What can you do when your own staff and volunteer management capacities seem too limited to take on big projects? Consider partnering with other not-for-profit organizations. This option has many advantages: it pools resources, makes big initiatives possible, and consolidates the search for potential employer partners.

Take, for example, the issue of homelessness. Several social service agencies and not-for-profits may be working on this cause in your community. Typically, these organizations all pursue their own fund development and volunteer programs. If your organization has an idea for a large and ambitious employer-supported volunteer program, it would make sense to combine the energy and resources of other compatible community service organizations to address the issue.

Establishing partnerships with other not-for-profit organizations can have the following advantages:

- pool expertise and resources (human and financial);
- address broad common issues;
- reduce competition for volunteer resources and funding;
- share planning responsibilities for initiatives/projects;
- use time efficiently;
- show collaboration and professionalism;
- share vision and establishes a network for addressing community needs and issues;
- demonstrate leadership and organization through partnership; and
- reduce the risk to individual organizations.

STEP 4: PLAN AND MAKE “THE PITCH”

The way you approach a company will depend on its size, and on whether or not it has an established ESVI. In a company that already has a program, there is probably a part-time program manager looking after employer-supported volunteerism. Write a letter to that individual, introducing yourself and your organization. Explain what your objectives are and why you have identified their company as a potential partner. Outline the possible benefits of a partnership. Ask them to consider your proposal, and inform them that you will call them in a week to arrange for a meeting to discuss the opportunity further.

A letter of introduction would probably be disregarded by a company that has no formal ESVI (that is, a business that is on the low end of the continuum of employer-supported volunteerism). In this instance, introduce yourself and your organization by calling the CEO or manager of public relations. Explain that you are interested in recruiting volunteers from their employee base to work on an important community project. Tell them that you would also like to discuss a potential partnership on employer-supported

volunteerism initiatives. Request a meeting: indicate that you would like to make a presentation to their company to demonstrate how and why your two organizations could work together in supporting volunteers.

4.1 How to Approach Potential Employer Partners

1. Be sure the companies you approach have the skills and expertise you require.
2. Develop a presentation that is based on initiating and building a relationship with the employer.
3. Identify who else from your organization should be included in the process.
4. When preparing your presentation, consider your own infrastructure and materials. Your presentation doesn't have to be fancy (you don't need a slide presentation or special marketing materials), just professional. Make sure that a company decision-maker and a manager of volunteers, if the company has one, attend the presentation. Include an active employee volunteer, if possible.
5. Set some specific goals for the presentation:
 - Are you asking for individual or group employee involvement?
 - Are you asking for in-kind donations (for example, company products and services) and employee volunteer time as well?
 - Do you have an idea for an ESVI that you want to sell to your potential employer partner? Have you researched the idea? Is it realizable?
 - Do you want your potential employer partner to take time to think about your proposal, or are you looking for a commitment right away?
6. Prepare a budget proposal that clearly outlines what financial support you are seeking from the employer (if any).

Develop your presentation in the same way you would prepare a grant application or proposal to request funding. The following outline/agenda will help you organize and deliver your presentation.

4.2 Presentation Outline/Agenda for a Community Investment Partnership

1. Introduction:
 - Provide an overview of ESVIs.
 - State the benefits of establishing a partnership with your organization, and outline the company's return on investment from a human resources perspective (that is, in recruiting and retaining employees).

- Discuss the long-term impact of a community investment partnership with your organization.
 - Link your organization's goals to the company's CSR mandate. Emphasize how a partnership could strengthen the missions of both organizations.
2. State your proposal:
- Provide background (that is, the experience your organization can offer the employer).
 - Present the project/volunteer overview (that is, the skills and expertise your organization needs from the employer);
 - Outline a partnership agreement. Make sure to repeat the return on investment for both parties, state the length of the agreement, and propose a level of involvement for the employer.
 - Identify the proposed project leaders.
3. State the financial implications:
- Present a budget proposal.
 - Discuss financial and non-financial costs.
 - State the anticipated cost savings and benefits (that is, increased employee job performance, improved sense of self-worth among employees, etc.).
4. Forecast the results:
- Demonstrate how a partnership will fulfil the missions of both parties.
 - Present the positive response that the company can anticipate from employees, clients, the public, company stakeholders and stockholders.
5. Answer questions:
- Prepare and bring a list of frequently asked questions.

See Appendix C for presentation tips and techniques.

STEP 5: ESTABLISH THE RELATIONSHIP

Although employer-supported volunteerism has many exciting aspects, it also presents a number of challenges. Make sure you understand these challenges before establishing a relationship with an employer partner. If employer-supported volunteerism is a new concept for your employer partner, you may have to assist them in establishing a program. You may also have to take the lead in defining the parameters of your partnership. Use this opportunity to present a wide range of options on how you can both work together to achieve common goals.

5.1 Assist Your Employer Partner in Establishing an ESVI

To help a company establish its own in-house ESVI, begin by encouraging the business to designate a staff person to oversee the program. Refer that individual to some of the resources that you found helpful during your research. Be prepared to describe to your employer partner what a program might look like. Provide them with an overview of other ESVIs, and suggest that they contact businesses with established programs in place.

Companies may wish to consider the following questions prior to establishing an ESVI:

- What are our goals in embarking on such a program?
- What does our company expect to achieve by establishing an ESVI?
- How will we encourage volunteerism among our employees?
- What will our employees gain by engaging in volunteer activity?
- Will our company seek formalized relationships with not-for-profits, or will we support our own employees in their individual volunteer efforts?
- Does our company have ideas about types of organizations that we would like to partner with?
- What level of risk—for example, in terms of legal and image issues—is our company willing to assume?
- How will our company recognize the volunteer efforts of our employees?

In order to create policies on these issues, the company may need to involve a range of stakeholders. Suggest to your employer partner that the following individuals be involved in the decision-making process: senior management, the human resources department, the marketing department, the board of directors, and employee representatives.

5.2 How to Manage Employer-Supported Volunteers

Although employer-supported volunteerism is a new kind of relationship between your organization, the employer and the employer-supported volunteer, remember that good volunteer management practices are universally applicable. Lead by example: demonstrate to your employer partner how your organization retains and supports volunteers. Give your employer partner an outline of your organization's volunteer management practices (screening, placement, orientation, training and skill development, feedback on work, evaluation and recognition).

Some of your own volunteer management practices may require minor adaptations for the employer-supported volunteer focus. For instance, the standard orientation session that explains your organization's mission and operations to new volunteers might need updating. A revised orientation session could include an explanation of the type of partnership that your organization and the employer have entered. This session is the perfect time to describe to employee volunteers the rights and responsibilities of all volunteers that work with your organization. You might also choose to revisit your organization's volunteer recognition practices, and come up with some creative new ideas tailored specifically to employer-supported volunteers.

Tip

The *Canadian Code for Volunteer Involvement* is a comprehensive guide that can help the not-for-profit and the employer develop guiding principles for employer-supported volunteer involvement.

Contact Volunteer Canada at 1-800-670-0401 to order a copy, or visit Volunteer Canada's Web site at www.volunteer.ca

5.3 The Importance of Screening

Although screening is only one component of good volunteer management practices, it warrants specific attention. Volunteer screening helps create and maintain a safe environment for your clients and the community, and ensures an appropriate match between the volunteer and the task at hand. Volunteer Canada urges all not-for-profits that involve volunteers in their operations to have a screening policy in place and to use it.

Screening should be conducted whenever volunteers are involved with your clients or community members on behalf of your organization. Employer-supported volunteers are no exception to this practice. If your employer partner has a screening policy in place, ask to review it. This way, you can be confident that the company is taking screening measures that are appropriate. If the company has not established a screening policy, or if their screening practices are less comprehensive than your organization's own, make clear that screening measures are necessary and will be taken before employees are accepted as volunteers with your organization. When developing written policies for partnering with employers, you might want to make screening a non-negotiable item that your organization conducts.

The Volunteer Canada Safe Steps Screening Program provides organizations with an easy-to-use method for ensuring that the people they serve are safe. The 10 Safe Steps are like a menu — you select only those steps that apply to your ESVI.

See Appendix D for the 10 Safe Steps as applied to screening employer-supported volunteers. You can also contact Volunteer Canada to order a copy of the Safe Steps Screening Program at 1-800-670-0401, or visit Volunteer Canada's Web site at www.volunteer.ca

5.4 Determine Your Employer Partner's Commitment

If your employer partner already has an ESVI in place, they may have clear ideas about how they want to contribute to your organization's goals and needs. To lay the best possible foundation for a healthy working relationship, ask yourself the following questions:

- **Release Time / Flex Time:** Is the company willing to give employees a reasonable amount of time off with pay to support a community cause? What amount of time off is considered reasonable?
- **Loaned Personnel:** Is the company willing to loan an employee or executive to your organization? If yes, for how long?
- **Use of Company Facilities / Equipment:** Will the company permit the use of facilities and equipment for volunteer activities? Will the company allow your organization to set up displays, or hold fundraising events and recruitment drives in company space?
- **Liability and Risk Management:** Will the company accept liability for employees who are working with not-for-profits as part of a volunteer initiative (for example, accepting liability for breaches of confidentiality, conflicts of interest or insurance claims)?
- **Unionized Workplaces:** Since collective agreements are very specific about job duties, it's important that an employee does not violate their agreement when performing volunteer work. Unionized workplaces tend to have more guidelines around volunteer involvement than non-unionized workplaces. Volunteer activities should not include tasks that other paid or unionized workers could or should do. Remember to develop volunteer position descriptions and communicate your expectations to union representatives.

Both parties should bring their employer-supported volunteerism policies to the table when defining the parameters for a healthy working relationship. Make sure that you understand the conditions under which the company wants to establish its ESVI. In your organization's policy on employer-supported volunteerism, state that you expect the company to clearly outline certain conditions (for example, release time / flex time, use of company facilities/equipment, etc.) and present them to you in writing.

5.5 Cost-Sharing of Projects

Nothing ruins a relationship more quickly than arguments over money! Be open and direct about your budget from the beginning. You and your employer partner might want to answer the following questions together:

- Who will cover the costs of supplies used during volunteer activities?
- Who will cover the costs of mailings?
- Who will cover the costs of advertising?
- What services will the company pay for and what services will be donated through employee time?

5.6 Publicity Agreements

Since most businesses and not-for-profits have strict policies on the use of their names and logos, establish a publicity agreement that addresses the following issues:

- Who will be responsible for conducting any or all publicity relating to the employer-supported volunteer program or project?
- Who is authorized to use your organization's name/logo and your employer partner's name/logo, and when and how may these be used?

Your employer partner may have specific ideas about the publicity they would like to receive from this partnership. Make sure that you are clear about each other's publicity expectations and establish them in writing.

5.7 Conflict-of-interest Policies

Ensure that any relevant conflict-of-interest policies are clearly stated in your policy.

5.8 Risks and Liability

Lines of responsibility need to be drawn when establishing risk management policies and practices. Good risk management will cover all areas of volunteer activity — from volunteer safety to the publication of your logo. Establish policies to help control risks (for example, a screening policy, harassment policy, anti-discrimination policy, and media policy). Aim for transparency: risk management policy statements and practices should be clear to your entire organization (that is, board of directors, staff, volunteers, clients) and your employer partner.

Think of risk as a spectrum with a low and a high end. A volunteer who assists in general office administration is at low risk, while a volunteer in a program involving

unsupervised visits with children is at higher risk. Obviously, the need for multiple and thorough screening procedures increases at the high end of the risk spectrum.

Since proper training can reduce risks, training should be mandatory for certain volunteer positions. A risk management policy could outline the positions that carry risk, and the type of training that volunteers will require for these positions. Consider the following examples:

- employer-supported volunteers involved in a day care program must be first aid certified.
- employer-supported volunteers on a hotline must attend counselling training sessions.
- employer-supported volunteers operating vehicles may require defensive driving certification.

Remember to include in the risk management policy who will be responsible for assuming the costs of such training requirements (that is, the not-for-profit, the employee volunteer, or the corporate sponsor).

Your policy should outline a process for investigating complaints made by or against employer-supported volunteers as well.

Risk and liability issues also come into play when planning a project or event that involves employer-supported volunteers. Before you start planning an employer-supported volunteer project, make sure to answer the following questions:

- What is at risk?
 - People: board members, volunteers, employees, clients, and the general public
 - Property: buildings, equipment, bank accounts
 - Income: sales, grants, contributions
 - Reputation: community trust
- How do we find where the risks might lie (that is, what can go wrong)?
 - examine your program or event carefully;
 - list the risks associated with your program or event;
 - review your insurance policy; and
 - talk with your employer partner and employer-supported volunteers about the risks.

- ❑ How can we control the risks?
 - Assess the risks and decide how to avoid or minimize them.
 - Continually review and reassess the risks.
 - Implement a risk management strategy that contains a communications component. If the worst happens, this component covers what should be said, when, to whom, and in what context.
- ❑ Although you cannot control all risks, you can try to:
 - Avoid the risk (that is, do not offer the event/service if it carries too much risk).
 - Modify your activities to make the risks more manageable.
 - Transfer or shift some element of the risk by having employer-supported volunteers sign a release, waiver and indemnity form.
 - Accept the level of risk and plan for the possible consequences.
 - Be proactive — a small measure of prevention goes a long way.

When planning employer-supported volunteer projects that carry some level of risk, determine who will carry the liability. Speak with your insurance provider to find out if your organization's insurance policy needs to be altered or expanded to include coverage of employer-supported volunteers or a specific volunteer event. Meet with your employer partner to discuss the terms of their company insurance coverage, and to clarify all insurance and indemnification arrangements as well.

A good resource for more information on risk and liability is *Managing Legal Liability and Insurance for Corporate Volunteer Programs* (see References).

See Appendix E for a sample of a release, waiver and indemnity form.

Once you understand the complexity of policy development, you may want to consider drafting and signing an individual agreement with your employer partner — one that outlines a risk management policy and the nature of each party's involvement. If you are part of a large, national not-for-profit organization, such an agreement may already be in place with your top sponsors. Consult with your own legal experts on the best course of action.

STEP 6: ENGAGING EMPLOYEES AS VOLUNTEERS

Not-for-profit organizations have to find ways to effectively engage employer-supported volunteers in meaningful opportunities. As companies start to develop their community involvement strategies, not-for-profits need to be proactive in giving employers ideas and options. Step Six is all about preparing your organization to engage employees as volunteers.

6.1 Identify Your Contact

Determine who within your organization will be the liaison with your employer partner. To help centralize the responsibility, you might want to engage an in-house volunteer coordinator for this position. Your ability to do so will depend on the structure of your employer partner's human resources department. If you are partnered with a large company, make sure they identify the departmental co-ordinators who can help focus your efforts.

If your partner is low on the continuum of employer involvement and support in employee volunteer activities, your interaction with the company might be limited to regular check-ins or updates with the company liaison. If, on the other hand, your partner is highly involved in the implementation of its ESVI, then you and the liaison might work together on all aspects of a project or event. When an initiative is highly employer driven and directed, it is important to collaborate with the liaison to ensure that your organization's needs are being properly represented.

6.2 Strike an Employer-Supported Volunteer Committee

On projects where the company and the not-for-profit work closely together, it might be appropriate (or even necessary) to strike an ESVI committee. Include representatives from both parties in the committee (that is, you and/or your staff, other program/project staff from your organization, employer-supported volunteers, retired employees, top-level management, the company contact person and any appropriate departmental staff from the company). Striking a committee helps create ownership among participants, and ensures that all parties have proper input. Determine who in the company will be your champions and work to build and strengthen these relationships.

Once your committee is in place, clarify who is responsible for:

- managing the program day-to-day;
- supervising employer-supported volunteers;
- controlling the budget; and
- communicating with the media.

Woody's Bar: A Champion for the AIDS Committee of Toronto

The AIDS Committee of Toronto (ACT) is one of the oldest and largest providers of services to men and women infected with HIV/AIDS. As a community-based, not-for-profit charitable organization, ACT has a paid staff of 43 people and about 1,300 individuals who volunteer each year. ACT's major annual events (for example, AIDS Walk Toronto, Dancers for Life, Fashion Cares) have raised millions of dollars over the years. Woody's, a popular Toronto gay bar, is a champion of ACT and well-known for its strong commitment to community.

Woody's general manager, Dean Odorico, is the in-house contact who works closely with ACT staff to organize fundraising events. "If an event isn't planned and implemented as a joint effort, it just won't work," says Odorico, "As well, when I hire staff, I makes sure they understand and support the bar's commitment to grassroots fundraising."

6.3 Establish Your Workplan and Schedule

Agree on management roles and responsibilities for both you and your employer partner. When establishing a workplan, set a reasonable timeline for completing the following tasks:

- developing volunteer position descriptions;
- recruiting, interviewing and screening employee applicants;
- training and orienting employer-supported volunteers;
- undertaking project/program activities (list these activities);
- reviewing progress;
- evaluating employer-supported volunteers;
- evaluating the employer partner;
- evaluating the ESVI/employer-supported volunteer event; and
- evaluating the not-for-profit organization.

6.4 Steps to Attracting Employer-Supported Volunteers

Talk with your employer partner about ways to attract employees to the program. Here are some ideas to help you get started:

- Have your employer partner announce the ESVI through regular company communication channels (for example, staff newsletters).
- Have the company conduct a volunteer interest survey to determine employees' interests for working on specific tasks and issues.
- Work with your employer partner to plan an employee volunteer recruitment strategy.
- Ask to give a presentation to the company's employees about your organization. In your presentation, outline which activities or projects you are looking for assistance on. Be sure to articulate the benefits that employees will derive from volunteering, and how their involvement will help your organization.
- Broadcast volunteer positions at staff meetings and in company newsletters, company Web sites or e-mail. Post opportunities on company bulletin boards, and distribute flyers in pay envelopes.
- Ask your employer partner to send out an appeal to retired workers who may want to get involved in volunteer activities. For more information on retiree volunteerism, refer to *Volunteerism Corporate Style: Managing Employee and Retiree Volunteer Programs* (see References).
- If appropriate, encourage the involvement of employees' family members in volunteer activities.
- Emphasize to employees the ways in which employer-supported volunteers are recognized and rewarded for their volunteer activities.
- Often there will be opportunities for a volunteer "career path" in a not-for-profit. Be sure to articulate to your potential employee volunteer recruits any opportunities for growth or promotion in volunteer positions.
- Make your volunteer position descriptions available to employees. Some employees will want to see these descriptions before committing to a volunteer activity.

STEP 7: RECOGNIZE EMPLOYERS AND EMPLOYER-SUPPORTED VOLUNTEERS

Appropriate, sincere and individualized recognition is an essential component of volunteer management. In building a relationship with your employer partner and the company's employer-supported volunteers, it is likely that you have made some creative adjustments to your organization's recognition practices. You may have helped to develop your employer partner's in-house recognition program as well. To ensure that the contributions of employer-supported volunteers are properly acknowledged, work closely with your employer partner to develop timely recognition practices. Discuss recognition ideas with your company contact, and consider presenting some joint awards or hosting an appreciation lunch, dinner, barbecue or reception — either annually or at the conclusion of a volunteer event/project.

7.1 Ways to Recognize Your Employer Partner

The role that your employer partner played in supporting the involvement of their employee volunteers may have been so significant that you want to demonstrate your organization's appreciation by going beyond the heartfelt thank you. The company may have provided notable incentives for employer-supported volunteerism by offering in-kind donations, supplying company facilities and equipment for a volunteer activity, or giving long-term or annual support for employee volunteer involvement.

Here is a list of ways that your organization could recognize an employer partner's contribution to employer-supported volunteering:

- Profile the company in your organization's newsletter and/or annual report.
- Profile the company in the local broadcast media or community newspaper.
- Host a volunteer recognition event, and invite your company liaison and other appropriate staff.
- Invite company representatives to your annual general meeting, and acknowledge them verbally or give them an award.
- Nominate company representatives for corporate or community awards.
- Take your company liaison person to lunch.
- Encourage your executive director to take the company's CEO to lunch.

Discuss the company and its contribution with your fundraising department or corporate relations staff. Your employer partner may be eligible for recognition within your organization's donor appreciation program — particularly if the company has supported the program by giving in-kind contributions or matching employee volunteer hours with a corporate donation.

Apart from saying a sincere “thank you” to all volunteers for contributing their time and talent to your organization's mission, the best way to recognize your employer partner and their employer-supported volunteers is by running an effective and inclusive volunteer program.

STEP 8: EVALUATE YOUR EFFORTS

In the same way that programs and events specific to your organization all undergo some form of evaluation, it's important that you evaluate and provide feedback to your employer-supported volunteers and employer partner as well. You might want to incorporate new mechanisms into your regular volunteer management practices to facilitate this task.

To help you assess your initial outreach efforts, consider the following questions:

- Were your research methods effective? Was your research helpful and, if so, how?
- How did companies respond to your outreach attempts?
- When presenting ‘the pitch,’ what worked and what didn't?
- If you weren't as successful as you hoped to be in bringing companies on board, why was this the case?
- Were you successful in making/establishing a valuable company contact, and is there potential for future follow-up?
- Are you keeping a company contact log/database for future reference?

Once you've evaluated your initial outreach efforts, review the employer-supported volunteer initiative from all perspectives. Prepare to evaluate by working closely with your employer partner and collecting data from surveys, reports, evaluation forms, and interviews with team members.

8.1 Evaluate Your Employer-Supported Volunteers

Consider the following questions when evaluating your employer-supported volunteers:

- Were employees eager to volunteer? Were they easy to recruit?
- Were they experienced or did they need training?
- Were they self-starters or did they need close supervision?
- Were they satisfied with their volunteer experience?
- Did they meet their own goals and gain new skills?
- Did they feel they contributed meaningfully to your organization?
- Do you think these volunteers may/will return to volunteer with your organization?

Don't leave individual volunteer evaluations to the end of the employer-supported volunteer project or event. Check in regularly with your employer-supported volunteers to make sure they are having a positive experience.

8.2 Evaluate Your Employer Partner

Consider the following questions when evaluating your employer partner:

- Did the company have one main contact or more than one? Was communication effective?
- Did top-level management support the program? If so, did this affect the program's success? If not, how did this affect the program?
- Did you require regular contact with the company?
- Did the employer meet all the conditions, expectations and responsibilities discussed at the outset of the partnership, or outlined in the partnership agreement?
- Was the company appropriately recognized for its contributions?

8.3 Evaluate an ESVI / Employer-Supported Volunteer Event

Consider the following questions when evaluating an ESVI or employer-supported volunteer event:

- What noticeable benefits did the company gain from the experience?
- What lessons were learned?

- Was the volunteer program on target regarding time, budget and volunteer hours needed? What changes to the program would you recommend making?
- Was the event managed effectively by company managers and your own managers?
- Were top-level management and your organization's board of directors pleased with the results of the partnership?
- Do opportunities exist to work again with the company?

8.4 Evaluate Your Not-For-Profit Organization

Consider the following questions when evaluating your not-for-profit organization:

- Did your organization meet its goals?
- Did your organization meet all the conditions, expectations and responsibilities discussed at the outset of the partnership, or outlined in the partnership agreement?
- Did your organization manage the program effectively?
- How can your organization improve its performance?
- How can your organization improve the relationship with its employer partner?

Share the evaluation results with your employer partner so you can both learn from the process. If the partnership is an ongoing one, discuss how you can work together to make improvements and implement changes. Make sure to promote the evaluation results internally as well as externally. This way, you can inform the community of your successes, and let your employer partner and employer-supported volunteers know how they are doing. Lastly, develop case studies from your events or programs — these will serve as effective advertisements for your organization when you go looking for corporate sponsors.

Appendix A: Case Studies

CASE STUDY # 1

The Children's Wish Foundation (CWF) of Canada is a national not-for-profit organization with 12 provincial chapter offices from coast to coast. The CWF is dedicated to fulfilling a favourite wish for children afflicted with high risk, life-threatening illnesses.

The Newfoundland and Labrador chapter of the CWF grants about 10 wishes a year from sick children who want to have a computer. Children who spend a lot of time at home due to illness find that computers provide entertainment, help them do homework, and let them reach out to others who have similar illnesses. Derek Rumboldt-DeLouche, the CWF chapter director for Newfoundland and Labrador, says that a sick child can feel extremely isolated when he or she is the only one in the community with a certain illness. By having a computer at home, “the child’s quality of life improves greatly,” says Rumboldt-DeLouche.

A number of years ago, when the CWF first started giving computers to sick children, the organization used a standard tender process to locate local computer suppliers. Although this process was effective, it wasn’t really personalized enough. So, six years ago the CWF took a different approach: it went looking for an employer partner that would recognize its goals *and* the needs of sick children.

The CWF’s first step was to find a supplier that could work with children, and respect the privacy and confidentiality of their families. The organization’s next step was to look at its finances: although the CWF could pay for the gift of the computer, it could not cover any other costs. As a result, the CWF needed an employer partner that would involve employer-supported volunteers to help children select and customize their computer systems, and train children and their families to use the new technology.

Once the CWF had established its goals and needs, the search for an appropriate employer partner began. This time, instead of a tender, the CWF approached local businesses directly. To establish a good match, the CWF checked out companies’ reputations, and asked for references from its own board of directors and volunteers. Rumboldt-DeLouche remembers, “A small, private firm seemed ideal. Right away, Prima Computer Solutions gave us the service and attention we needed, and agreed to all our requirements.”

Prima Computer Solutions was a new company back then, and had not yet aligned itself with other charity endeavours. Patsy Tremblett-Dinillo, president of Prima Computer

Solutions, recalls the beginnings of the partnership with the CWF: “I had volunteered for the CWF in the past and knew it was an organization I really believed in. Although our company couldn’t donate money because we were new and still small, we had a commitment from our staff of five to volunteer their time and energy.”

The partnership between the CWF and Prima Computer Solutions developed gradually. In the first year, the partners dealt strictly with the wishes of sick children. Then, Prima Computer Solutions began getting involved in other areas of the CWF, such as fundraising and donating in-kind. The company’s co-owner moved into a leadership role with the CWF and sat on the fundraising committee. Now, Prima Computer Solutions helps the CWF by servicing its office computers at no cost, other than the fee for hardware replacements.

“Being a partner with the CWF helps us meet our business goals: serving local customers and giving back to the community that supports us,” says Tremblett-Dinillo, “We’re also a member of the Community Services Council — a council of businesses and other community organizations. Since we became involved with the CWF, we believe that our customers are more loyal to us, and that’s important. Our image in the community is enhanced through this partnership, and that is essential for a small business like Prima Computer Solutions.”

Through employer-supported volunteerism, the CWF and Prima Computer Solutions meet community needs together. “In this case we found that bigger isn’t better,” says Rumboldt-DeLouche of the CWF, “By going to a small, local company we get the personalized service we require for the children who need it most.”

In 2001, the CWF nominated Prima Computer Solutions for a local volunteerism award. The company received the Corporate Community Investment Award for its outstanding efforts in meeting the computer needs of housebound children.

CASE STUDY # 2

Santropol Roulant is an award-winning grassroots, youth-run community organization dedicated to alleviating malnutrition and social isolation among Montréal seniors through the power of youth volunteerism.

For the past six years, Santropol Roulant (SR) has run an intergenerational Meals-on-Wheels program on the island of Montréal. The youth of SR make and deliver hot and nutritious meals to up to 110 seniors a day, six days a week, by foot, bike or car. Since 1995, SR has served over 150,000 meals to seniors living with a loss of autonomy, and engaged over 1,000 youths in volunteer, intern and job-training positions.

SR is also dedicated to skills training through community development. Currently, the organization has a core staff of four individuals and over 100 active volunteers, most of whom are between the ages of 16 and 30. SR's volunteers are responsible for cooking and delivering meals, planning and implementing activities at the community centre, working on general office activities, designing posters and publications, repairing delivery bikes, and more.

One of the main goals of SR “is to build meaningful relationships between the generations,” says Brian McFarlane, the organization's fundraising coordinator. In 1999, SR moved closer to this goal by opening an intergenerational community centre called the *Carrefour des Générations*. In this environment, young and old can share experiences and ideas and “work together — as equals — to create a strong and healthy community,” says McFarlane.

In the year 2000, the organization decided it needed to increase corporate involvement and expand its base of financial support. To garner interest from the local business community, SR approached multimedia companies staffed primarily by young people. Most businesses responded very favourably to SR's youth-oriented outreach: “Sure, we would love to get involved,” said one employer. “Send us your volunteer package to tell us how our company and your organization can get involved.”

“It was then we realized we were not adequately prepared,” says McFarlane. “Our volunteer program was designed to engage youth volunteers through high schools, colleges, universities and the local community, and we had not thought about how to integrate employer-supported volunteers into our programs. We realized we still had a lot of work to do.”

Since SR had not carefully identified its goals and needs in relation to an employer-supported volunteer program, it ran into difficulties early on. As well, no one had consulted the coordinator of volunteers about the organization's corporate recruitment strategy. In fact, an influx of employer-supported volunteers would have overwhelmed the organization's capacity to effectively engage its regular volunteers.

What SR really needed weren't more volunteers but a professional communications strategy — one that would help it get its mission and message out to business, government and the public. Currently, SR is in the process of building partnerships with local communications and graphic design firms, and hopes that the expertise of employees in these business areas will help SR meet its needs.

As SR's experience demonstrates, organizations must act strategically. “Given the staff constraints that small organizations face,” says McFarlane, “it is essential that you identify the weaknesses in your organization and link yourself with businesses or employer-supported volunteers who can help you build capacity.”

CASE STUDY #3

The VON (Victorian Order of Nurses) is a national not-for-profit, charitable organization with branches in every province in Canada. Each year, VON branches involve 15,000 Canadian volunteers in its voluntary activities. The VON's Hamilton-Wentworth branch has 1,700 volunteers helping to carry out their many services to the community.

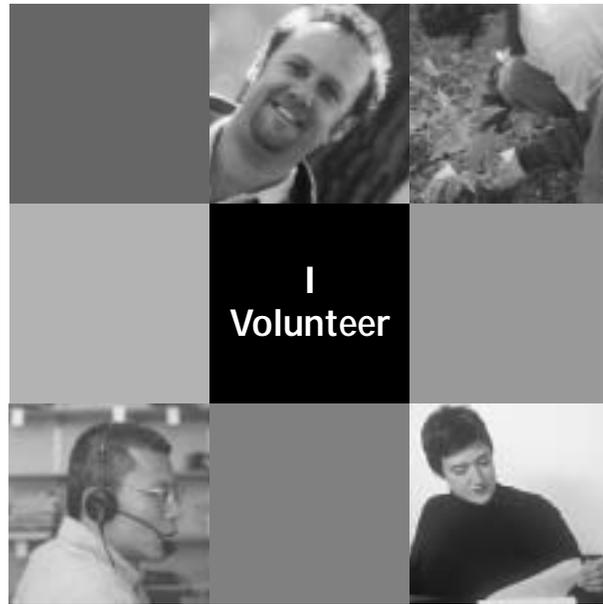
For 37 years, the VON in Hamilton-Wentworth has run a Meals-on-Wheels program, delivering up to 375 meals a day to seniors and people with disabilities in the community. In the late 1990s, the program was suffering from a shortage of volunteers for its lunch-hour meal delivery. One VON volunteer, who was also an employee of the Canadian Imperial Bank of Commerce (CIBC), felt that the Meals-on-Wheels program was so important that he offered to arrange for a meeting between the VON and his fellow employees. Margaret Warriner, the VON's manager of volunteer services in Hamilton-Wentworth, went to the local CIBC branch and made a presentation to its employees. That day, 30 CIBC employees signed up to volunteer.

Warriner says that the CIBC employer-supported volunteer program saves the VON a significant amount of staff time because "CIBC's staff do all the recruiting and scheduling." Employees of CIBC volunteer for two hours at a time on a rotating schedule, delivering meals to 16 citizens who live in the neighbourhood around the bank. CIBC gives its employees one hour of time off to volunteer, and employees donate an hour of their own time.

Engaging employees as volunteers has many advantages. "They are generally used to working with the public, and they are professional and reliable," says Warriner. By establishing a relationship with CIBC, the VON gains outside expertise. By participating in VON volunteer initiatives, CIBC employees receive an opportunity to give back to their community, and gain insight into social issues. Employees also report that volunteering helps them direct their energies by getting out of the workplace and focusing on those in need.

The partnership between the VON and CIBC goes well beyond the Meals-on-Wheels program. CIBC handles the VON's financial accounts, and CIBC staff participate in VON fundraising events, such as golf tournaments. At Christmas time, the bank helps to raise money for the organization by selling VON Christmas Angels.

CIBC has proven itself to be a VON champion in other ways too. Thanks to Marianne Mota of CIBC, the Bank of Montreal is now involved in the Meals-on-Wheels program. Mota approached the Bank of Montreal and explained to staff how employer-supported volunteerism could work in a banking environment. "Marianne was able to answer all their concerns that volunteering would be too disruptive to their workplace," says Warriner of the VON. "She won them over!" In the future, Warriner hopes to involve more employer partners, like the CIBC and their dedicated staff, in the VON's volunteer activities.



Appendix B: Research Tips and Techniques

- It's a good practice to dedicate a central file to collecting research on employer-supported volunteerism. Whenever you see an article in the newspaper or on the Internet, clip and file it even if you don't need it at the moment. The more thorough your record-keeping, the easier it will be for you to do your job.
- When you contact companies, record the dates of all your calls and the names and titles of the people with whom you speak. Keep a call log or develop a database for this purpose. Should you call back six months later, it's nice to be able to refer to a previous call. Also, a database can come in handy for recording the information you gather about an organization (for example, an organization's mission and goals, and its current rate of volunteer involvement).
- Public companies and Crown corporations are obliged to produce annual reports and divulge information about themselves to the public or their shareholders. Since private companies are not obliged to do so, it may be more difficult to locate information about them.
- Many large businesses produce annual reports and public relations material related to their community activity. For example, both the Royal Bank and Petro-Canada produce a community report dedicated to their employer-supported volunteer initiatives. Dow Chemical also has a section in its annual report on community volunteer activity.

To find out if a company has already established an employer-supported volunteer program, check out their Web site or call them. Ask for copies of the following documents:

- company brochures, newsletters, and magazines
- donation guidelines
- material on existing employer-supported volunteer initiatives
- material on employee associations, social clubs or trusts.

When conducting research on large organizations, ask the following departments for information on employer-supported volunteer initiatives:

- community relations
- corporate communications
- corporate relations
- public relations
- human resources.

- Remember that national companies often have regional offices. Find out if a company's employer-supported volunteer program (ESVI) is run centrally or through a local branch.
- If a company does not have a formal ESVI in place, it might have one staff person whose looks after volunteerism (for example, by posting volunteer opportunities on the intranet or on a community notice board). Keep searching until you find this individual.
- Check with volunteer centres, volunteer councils and community-based associations to locate potential employer partners. Networking with other not-for-profit organizations may also help you discover potential partners.

Appendix C: Presentation Tips and Techniques

- Start with the basics:
 - What are the key assets (the products and services) of the company you are interested in partnering with?
 - Think about how an employer-supported volunteer program could build on the company's image, products, and strengths.
 - How could your organization benefit from the company's strengths?
- Call your presentation "A Community Investment Partnership."
- Access the in-house expertise of fundraising or corporate development staff for input on the content of your presentation.
- Clearly identify the skills and expertise you are looking for, and know the level of involvement you are seeking from your potential employer partner. Are you proposing:
 - An event (such as a "day of caring")?
 - A short-term or long-term initiative?
 - Group involvement and/or involvement from individual employees?
 - A commitment from employees to volunteer during or after company hours?
 - Use of company facilities and/or in-kind donations?
- Base the level of involvement you are seeking from your potential employer partner on your research. Show the company you are familiar with their size, what they do, and what their goals are.
- Take printed copies of all the details and benefits of employer-supported volunteerism with you to your presentation.
- During your presentation, be prepared to discuss issues such as recognition, training and facilities. Also be prepared to answer questions about cost. In your reply, highlight information about the value and benefits of the partnership. Be clear on what costs your organization can assume, and what costs you would like your potential employer partner to assume. Discuss who will be responsible for the budget.
- Explain your organization's policies and how they work. Stipulate whether you want to establish a formal, written agreement with the company.
- If the company does not have a manager of volunteers, suggest how the company could divide its volunteer management responsibilities. Perhaps you could offer to train a company employee in volunteer management practices.

- Be creative! Ask the company to conduct an employee survey of volunteer interests, or offer to conduct it yourself.
- Show professionalism and confidence. Go in with the expectation that the company will say yes.
- If you get a no:
 - Remember this saying: “Great ideas don’t die, they just get put into the next fiscal year.”
 - Identify the reasons that the company decided not to partner with your organization. Try to leave an open door for returning to the company in the future.
- Evaluate your presentation and learn from it.

Appendix D: The Safe Steps Screening Program

The Volunteer Canada Safe Steps Screening Program is an easy-to-use 10-step process that serves two main purposes:

- to create and maintain a safe environment;
- to ensure an appropriate match between volunteer and task.

The 10 Safe Steps are like a menu — you select those steps that apply to your employer-supported volunteer program.

THE 10 SAFE STEPS ARE:

1. Determine the risk

Ask yourself what is at risk, what are the risks, and how the risks can be controlled.

2. Write a clear position description

Prepare your volunteer position descriptions after reviewing the employee's job description. The latter will tell you a lot about the employee's skills. Ask the employer-supported volunteer what skills and experiences he or she would like to acquire from volunteering.

In a position description, responsibilities and expectations can be clearly set out, right down to the position's do's and don'ts.

3. Establish a formal recruitment process

Have employer-supported volunteer positions broadcast in staff meetings, company newsletters, company Web sites or e-mail. Post volunteer positions on company bulletin boards, or include flyers in pay envelopes. Work together with your employer partner to plan the best way to recruit employees as volunteers.

4. Use an application form

The application form provides needed contact information. If the volunteer position requires other screening measures (for example, medical exam, driver's record, Police Records Check), the application form will ask for permission to do so.

5. Conduct interviews

Interviews let you talk with candidates about their background, skills, interests and availability. Interviews also help ensure that candidates will fit in with the organization.

6. Follow up on references

By identifying the level of trust required in the position and asking specific questions, the applicant's suitability may be easier to determine. People often do not expect that their references will be checked. Do not assume that applicants supply the names only of people who will speak well of them.

7. Request a Police Records Check (if necessary)

A Police Records Check (PRC) is just one step in a 10-step screening process. PRCs signal — in a public way — that the organization is concerned about the safety of its clients.

8. Conduct orientation and training sessions

Screening does not end once the employer-supported volunteer is in place. Orientation and training sessions offer an opportunity to observe volunteers in a different setting. These sessions also allow organizations to inform volunteers about policies and procedures. Probation periods give both the organization and the volunteer time to learn more about each other.

9. Supervise and evaluate

The identified level of risk associated with a volunteer position will determine the necessary degree of supervision and evaluation. If the risk is great, the volunteer should be under close supervision. Frequent feedback in the first year is particularly important. Evaluations must be based on position descriptions.

10. Follow up with program participants/clients

Regular contact with participants/clients can act as an effective deterrent to someone who might otherwise do harm. Employer-supported volunteers should be made aware of any follow-up activities that may occur. These could include spot checks for volunteers in high-risk positions.

Appendix E: Sample Waiver Form

RELEASE, WAIVER AND INDEMNITY

To consider granting me, [employer-supported volunteer's name], permission to participate in [event], sponsored by [list all partners], to take place on [date], I hereby release, waive and forever discharge [list all partners] and their respective agents, officials, officers and employees of and from any and all claims, demands, damages, costs, expenses, actions and causes of action, whether in law or equity, in respect of death, injury, loss or damage to my person or property howsoever caused, arising or to arise directly or indirectly by reason of my participation in the said event, whether as a participant, spectator or otherwise, whether prior to, during or subsequent to the event, and notwithstanding that same may have been contributed to or occasioned by the negligence of any of the aforesaid.

I further hereby undertake to hold and save harmless and agree to indemnify [list event partners] all the aforesaid from and against any and all liability incurred by any or all of them arising as a result of, or in any way connected with, my participation in the said event.

I am aware that the activities associated with the event may involve risk of injury and may require a certain level of fitness for safe participation. I warrant that I am physically fit to participate in these activities and further, in order to participate in the event, I hereby agree to assume any and all risks, which may arise from my participation.

By signing this form, I acknowledge having read, understood and agreed to the above release, waiver and indemnity. I further agree that this release, waiver, and indemnity shall bind my estate and personal representatives.

Date Name of Participant (please print)

Witness (signature) Signature of Participant

Name of Witness (please print) Signature of Parent or Guardian
(if participant is under 18 years of age)

Name of Company/Organization

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