

# BEST PRACTICES SEMINAR NEWSLETTER



## In This Issue

- Engaging Young Professionals in Giving and Volunteering
- Building a Strategic Choice Employee Giving Campaign
- Role and Value of a Charitable Federation
- Developing an Effective Volunteer Program
- Examples of What Works – Effective Employee Giving Practices
- Charities@Work 2008 Recognition Awards
- New Charities@Work Corporate Partner
- Charities@Work to Undertake Groundbreaking Research Project

## SEMINAR SPONSORS

HSBC 

**DRAFTFCB**



This year's seminar was underwritten and sponsored by HSBC, Draftfcb and HP. Charities@Work appreciates the dedication of these organizations to make this year's conference a great success.

# Building an Engaged Community at Your Workplace

## 7th Annual Best Practices Seminar Held In Chicago

The 7th Annual Charities@Work Best Practices Seminar entitled "Building an Engaged Community at Your Workplace" was held April 15-17th, 2008 at the Millennium Knickerbocker Hotel in Chicago, Illinois. The seminar was sponsored and hosted by HSBC, Draftfcb and HP.

Bill Strathmann, chief executive of Network for Good kicked off the seminar with a keynote address on The Value of Corporate Social Responsibility. He showcased examples of socially responsible companies.

Strathmann explained how technology has revolutionized giving. There has been a 101 percent in online from 2004-2006

compared to only 6 percent growth in offline donors. More than 50 percent of online donors are new and they tend to be younger and more generous than those who donate offline.

Mary Kay Leonard, group vice president investor relations, at United Way of America, introduced the seminar participants to the new strategic focus for United Way. Increasingly, United Way organizations are moving away from the traditional model and focusing on three "pillars of advancement"

- n Education – Helping children and youth achieve their potential.
- n Income – Promoting financial stability and independence.
- n Health – Improving people's health.

Other featured speakers included John Coy, president, The Consulting Network;



Andrew J. Tousignant, vice president, office of business social responsibility, UnitedHealth Group and Bob Bernstein, chief media officer for the Chicago office of Draftfcb.

This annual seminar gives participants the opportunity to share ideas and network with other professionals and provides an opportunity to stay current on the trends, hot topics, and best models of employee involvement initiatives including employee giving and volunteer programs.

## Charities@Work 2008 Recognition Awards

The 2008 Charities@Work Best Practices Awards were presented this year to honor leadership and excellence in employee giving campaigns. Receiving the top honor was HP for outstanding philanthropic spirit and commitment to its employee giving campaign. This award recognizes a company that promotes the value of employees' involvement in charitable giving. Earth Share president and CEO, Kalman Stein said, "HP is an outstanding example of innovation, leadership and employee

commitment to charity. The company has a long history of philanthropy and continues to demonstrate that commitment through its leadership and support of the annual employee giving program."

Charities@Work also honored four other companies who exhibit excellence in workplace giving. Those companies included:

- n **UnitedHealth Group**
- n **FINRA**
- n **Thomson Reuters**
- n **Ameriprise**

Each company achieved double digit increases in their annual employee giving

campaigns. These awards honored their excellence in workplace giving campaign results in 2007. These annual Charities@Work Awards recognize the leadership and examples of companies who build successful strategies and grow their employee volunteers and campaigns. America's Charities, Community Health Charities, Earthshare and Global Impact are proud to recognize the successful efforts of UnitedHealth Group, FINRA, Thomson Reuters and Ameriprise Foundation and appreciate their continued dedication to employee giving campaigns.



## What Works – Examples of Best in Class Practices Employee Giving Campaigns

Several companies at the 2008 Best Practices Seminar provided participants with an overview of their employee giving programs. Below are some specific best in class practices provided by HSBC North America, Blue Cross Blue Shield of Minnesota and HP.

### HSBC North America

HSBC identified several best practices including:

- n Offering continuous payroll contribution giving. Employees don't need to pledge every year as the gift will continue until cancelled by the employee.
- n Aligning the employee giving campaign with the company's sustainability objectives.
- n Obtaining senior management endorsement, buy-in and engagement. The company selects the chair of the campaign from the ranks of senior management.
- n Utilizing the campaign coordinator role as an employee development tool by identifying high potential employees to coordinate the annual effort.
- n Establishing goals based upon employee participation.
- n Offering giving choices to employees by including nonprofit organizations that are selected by employees.
- n Providing year round communication, education, exposure and involvement opportunities.
- n Recognizing and thanking employees.
- n Making the campaign fun.

As a result of these practices, HSBC has achieved participation levels in excess of 70 percent and raised \$6.3 million in donations.

The HSBC program is branded as the *United for Hope* campaign as well as includes the local United Way and 11 national organizations. The additional charities are selected through an employee survey that is updated every three to four years. In order to be eligible to participate in future campaigns a charity must garner a minimum of 2 percent of the total pledges in each campaign.

### Blue Cross and Blue Shield of Minnesota

Blue Cross and Blue Shield also provided participants with an overview of its program and the best practices the company employs. Branded as the *Blue Cross Community Giving Campaign*,



the program incorporates a strong organizational team utilizing a number of volunteers, a leadership giving program, employee choice, a major company kickoff event, and a company match. Blue Cross pays all administrative fees so every dollar of employee donations goes directly to the recipient charity.

The company supports the campaign with a full communication program including posters, brochures and a campaign video.

A few years ago the company undertook an assessment of its program and benchmarked against several peer companies. One of the outcomes of the assessment was the development of a strategic campaign plan. This plan identified the strengths, weaknesses, threats and opportunities. Based upon this situation analysis, the company set specific goals and strategies to revitalize the campaign organization, branded and marketed the campaign to reach out to employees including younger donors and made the campaign more efficient and effective.

The company has been successful in maintaining participation rates greater than 50 percent.

### HP

HP conducts an electronic giving campaign. Employees' gifts are matched dollar for dollar to qualified charities. Charity partners include America's

Charities, Community Health Charities, Earth Share, Global Impact, Global Giving and United Way.

The company ramped up its internal communications program to support the giving program. The communication strategies are designed to:

- n Drive a single consistent national message while providing an opportunity for local relevance.
- n Provide the tools, training and resources to local volunteer campaign leaders.
  - l Campaign virtual training sessions.
  - l Templates for email communications.
- n Embrace the technology-centric workforce.
  - l Online-only pledge tools (no paper pledge forms)
  - l Real-time data access
- n Craft messages that respond to employee interest.

The company prepares printed collateral materials that are distributed across the United States, utilizes email messages to promote the campaign and creates internal Web sites and volunteer voices videos to support giving.

## Engaging Young Professionals

This millennium has ushered in an engaged group of young professionals who are smart, sophisticated, tech savvy and have an empowering sense of abilities. They have been taught that they can accomplish any task and achieve any goal they set their minds to and this perspective carries over to their workplace environment. The Millennials, or Gen Y, as they are called, are those born between 1977 and 1990. This group is entering the workforce in record numbers and is bringing with it a new generation of ideas, attitudes and perceptions which are presenting challenges for employee giving campaigns.

To engage this new professional, we must first understand the characteristics of this group. According to a presentation given at the Charities@Work Best Practices Seminar by Draftfcb, a leading media and public relations firm, people age 18-29 are better educated and more affluent than in any previous generation. They also are more diverse with 38 percent of them identified as non-white. This group has grown up with technology and communicates in ways that often mystify their elders. Millennials are a very social group and are connected to friends and peers 24/7 primarily through their cell phones. It is estimated that more than 195 billion text messages were sent in 2007 and more than 71 percent of those were from users aged 18-44. They are a very social group.

In their employment, younger employees are more flexible and often define the "office" as anywhere they happen to be since they are able to connect and communicate using their Blackberry or other smart devices. They are very comfortable with change and are generally self-confident, expect respect and want to be empowered.

Focus groups conducted in 2007 by The Consulting Network, a national management consulting firm specializing in corporate social responsibility, community relations and employee involvement, found this

### 10 Tips for Recruiting Younger Employees as Donors

1. Recruit them to serve on campaign committees.
2. Solicit their input and value their opinion.
3. Use Gen Y to communicate with Gen Y. Have them send email endorsements, text messages to their peers.
4. Have a visible presence on the Web or Intranet.
5. Appreciate and value small gifts.
6. Obtain testimonials/endorsements from younger employees.
7. Demonstrate the impact of their gift.
8. Provide information and educational materials.
9. Look for opportunities to create meaningful events where they can socialize and network with their peers.
10. Promote and feature causes/issues that are important to this group of employees.

generation of employees have positive attitudes towards charitable giving and volunteering. Most learned the value at an early age either through family participation, church involvement or at school. This group is more likely to make small financial gifts. A 2005 study conducted by Craver, Mathews, Smith & Co. found that this group supports causes that impact them and generally are more supportive of disaster relief, animal welfare, human rights, environment and civil liberty causes.

A 2007 study conducted by Deloitte & Touche LLP found that companies that help their employees volunteer their professional skills to nonprofit organizations could have a leg up when it comes to recruiting Gen Y talent. Nearly two-thirds (62 percent) of 18-26 year olds participating in the survey said they would prefer to work for companies that give them opportunities to contribute their talents to nonprofit organizations. This generation expects to make a difference according to the Deloitte survey.

Bob Bernstein, chief media officer for the Chicago office of Draftfcb gave participants tips for communicating with young professionals.

- n **Empower them** – This group wants to feel as though they are a part of something essential. It is very important to solicit their input and give them a role in the decision making process because they want to

contribute intellectually and financially. They see their ideas as strengths in changing a cause for good.

- n **Engage them in two-way conversation** – There is a need to move from mass communication vehicles to more of a two-way conversational, niche communication style.
- n **Create an event** – Remember this group is very social, likes to network with peers and shows up where their friends are. Experiential marketing is a preferred method for these Millennials or the Gen Y group.
- n **Incorporate Buzz** – It is important to use Gen Y to market to Gen Y. They trust what their peers have to say more than their employers. This group is very vocal and wants to talk and be heard. Consider visible easy ways for them to share their participation.
- n **Use online, social networks** – This generation grew up with the Internet and uses it for all facets of their lives. Online activity allows for direct, two-way communication, and allows for interaction and immediate action. The top social networks are MySpace, Facebook and LinkedIn. Social networking has grown 95 percent in the past 18 months and nearly 50 percent of this demographic group utilizes it every month. Most Millennials average 20-30 visits per month.

### Save the Date for 2009!

The 2009 Best Practices Seminar will be held March 24-26, 2009 in New York City, NY. Meet us in the Big Apple and enjoy another year's Best Practices conference while enjoying America's city that never sleeps!

## Building a Strategic Employee Giving Campaign

It is estimated that more than 60 percent of the Fortune 500 companies now conduct some sort of expanded giving campaign. While United Way remains the predominant campaign partner, more companies are including other charities and federations in the employee giving program.

This expansion is being driven by four primary factors according to research conducted by The Consulting Network:

1. Employees are expressing a stronger desire to have additional charitable giving options as part of the annual giving program.
2. Technology has made it possible to efficiently collect and process contributions to a broader range of charities.
3. Companies are looking to align the giving campaign with other corporate philanthropic interests and programs.
4. Companies are using an expanded giving program as a strategy to engage younger employees and to position the program as being relevant to a broader group of employees.

As companies look to expand the giving program, a debate often occurs. Is it better to offer strategic choice and partner with specific charities/federations or is it better to not feature any charity partners allowing employees to give to any charity of their choosing in a wide open choice campaign?

A proven alternative to the wide open campaign is one that offers strategic choice, which offers the following benefits.

- n A focused program that is aligned with other corporate interests.
- n A balanced interest of key stakeholders including the company, the employees, the community, and the company's charity partners.
- n An established partnership with federations and charities that can support corporate and employee initiatives.
- n A support mechanism for the campaign coordinators who can rely on the charitable partners as a resource by providing them with examples of best practices, assisting in the training of campaign volunteers, providing informational and educational outreach materials and supporting campaign events.

The following are guidelines companies can consider in selecting charities to participate in the employee giving



campaign.

- n Define your objectives for conducting an employee giving program.
- n Identify the demographics of your workforce.
- n Assess employee interests, attitudes and perceptions.
- n Determine opportunities to align corporate philanthropic initiatives with the employee giving program.
- n Identify the specific issues or causes that should be included in the giving campaign by examining corporate policies, employee interests, and philanthropic focus/objectives.

At the 2008 Best Practices Seminar, an example of a strategic employee giving campaign model was presented by Marshall Poindexter, director, global patient advocacy & Americas corporate citizenship, GE Healthcare. Three overall GE Healthcare corporate citizenship goals are supported by the campaign.

1. Improve the communities where we live and work.
2. Focus on three GE identified areas:
  - l Education and Youth;
  - l Environment and Community Development for the Disadvantaged;
  - l Healthcare.
3. Align our assets – people, dollars, processes – to work as one GE in the community.

As a company, GE branded the program as the iCare Employee Giving



Program and moved to a “highlighted choice” campaign. While they still offer employees give to any nonprofit but it promotes five key charities and their relationships with the company. The five charities are the American Cancer Society, American Heart Association, Alzheimer's Association, Community Health Charities and United Way. Representatives from the five featured charities are invited to actively participate in segment/functional iCare meetings. This strategic focus proved to be successful for GE as they increased employee participation to 30 percent and increased employee giving from \$110 million to \$183 million for the 2007 campaign.

Building a strategic employee giving campaign helps corporations to support their employees' philanthropic goals, invest in the communities where they live and create an identifiable focus on their corporate social responsibility priorities.

# The Role and Value of a Charitable Federation

Federations are the liaison between a network of aligned charities and various employer groups and offer benefits to both groups of stakeholders. A key role of federations is to evaluate member charities annually to reassure companies and donors that their members charities meet high standards of performance and financial integrity. Federations are focused on three primary goals.

1. Supporting companies in their quest to make the workplace-giving campaign more efficient, cost effective and responsive to the employees' charitable interests.
2. Ensuring that donors in the workplace are presented with charitable giving options that meet the highest standards of efficiency, ethics and public accountability.
3. Raising more money for member charities, enabling them to provide critical services.

## Benefits to the Employer

- n Federations represent only credible charities that are reviewed annually to ensure high standards of performance and financial integrity.
- n Using federations is efficient for the employer. The employer is provided with a single point of contact representing a broad number of charities. Federations have staff and field directors who can coordinate their members for events, agency fairs, training and other campaign events.
- n Federations often consist of charities with similar focus and purpose. A federation listing is an effective way to promote and market charitable giving to potential donors.



- n Federations reduce the number of calls by charities to an employer seeking access to the workplace campaign while responding to employees desire for greater choice in the campaign.
- n Federations offer resources to make the campaign more effective including a national network of experienced and trained staff, access to best practices, training for campaign volunteers and a link to volunteer opportunities.

## Benefits to the Donor

- n Donors are assured that the charities represented by federations are credible organizations and meet the highest standards of performance. Membership in a federation is like receiving the "Good Housekeeping" seal of approval for a charity.
- n Efficiency of the federation ensures the maximum amount of the donor's gift goes to the charity to provide services.
- n Federations facilitate the acknowledgement of gifts to the donor.
- n Federations can introduce donors to members' programs and volunteer opportunities.

## Benefits to Individual Charities

- n Charities voluntarily participate in federations and recognize them as the most efficient means of participating in workplace giving campaigns.
- n Federations allow charities to focus on their core mission of providing services. Charities often view the staff of federations as an extension of their own fundraising departments. The staff and administrative costs associated with federations are seen as comparable to setting up a workplace giving department within the charity.
- n Federations reduce the cost and work for charities by providing aggregate reports from multiple employer groups, reducing the number of financial transactions and serving as the liaison to the campaign.
- n Federations simplify and reduce processing costs to the individual charities.
- n Federations coordinate workplace giving events and offer opportunities for the charities to interact with the workplace donor.
- n By outsourcing this fundraising component and joining together with other charities, members of federations achieve an economy of scale in their workplace giving efforts that benefits the charities, the employers and the donors.



## New Corporate Partner

The four federations of Charities@Work- America's Charities, Community Health Charities, Earth Share and Global Impact - are pleased to welcome JPMorgan Chase as their newest campaign partner and look forward to supporting their employee activities.

JPMorgan Chase is the latest corporation to expand its campaign by offering strategic choice to its employees. The charity partners in the JPMorgan Chase Good Works employee giving program now include America's Charities, Community Health Charities, Earth Share, Global Impact, United Way, United Negro College Fund, Hispanic Scholarship Fund and the Asian and Pacific Islander American Scholarship Fund.

Good Works is the overall brand that the company uses to encompass giving, volunteerism and other employee engagement opportunities. The newly branded program will be offered to all 140,000 domestic employees.

## Charities@Work Undertake Research Project

Companies are invited to participate in a research survey on trends and best practices in corporate employee involvement programs. The Consulting Network, is teaming with Charities@Work™ to conduct this comprehensive research project.

The first survey was conducted ten years ago and was updated in 2002. The data shows that employee involvement programs continue to change significantly. Updating the survey will give companies a better understanding of how employee involvement is evolving across corporate America and what motivations are driving these changes. For more information on how your company can participate contact Charities@Work at (866) 641-9191. To complete the survey go to

[http://www.surveymonkey.com/s.aspx?sm=zLOVXUXMPLfjJFt24UobbA\\_3d\\_3d](http://www.surveymonkey.com/s.aspx?sm=zLOVXUXMPLfjJFt24UobbA_3d_3d)

Your participation will contribute to the research and when added to the data collected from other survey participants will provide one of the most detailed assessments available. As an incentive, all companies who participate will receive a summary copy of the results. We welcome your participation!

## Developing an Effective Employee Volunteer Program

Dianna Smith with VolunteerMatch and Christy Eichers with Medtronic teamed up at the Best Practices Seminar to present on Developing an Effective Employee Volunteer Program.

Smith indicated that it's easy to make the case that employee volunteer programs are an important part of a company's employee relations objectives and corporate citizenship strategies. She quoted a 2007 study conducted by Fleishman Hillard/National Consumers League that found that 27 percent of companies believe a commitment to employees is part of being a good corporate citizen with 23 percent indicating that commitment to communities was also important for corporations. A Points of Light Foundation survey indicated that 74 percent of the companies surveyed agree that volunteerism increases employee productivity and 93 percent said their volunteer programs helped improve employee teamwork.

Christy Eichers helped create the Medtronic employee volunteer program which is branded *Mission in Motion*. The volunteer program supports the 6th tenant of the corporate mission which states, "To maintain good citizenship as a company."

Eichers offered the following guidelines for companies looking to develop an employee volunteer program.

- n **Flexibility and Choice** – The key is to offer a program that supports employees in their interests and matches their passion. Volunteer programs should encompass a number of activities that allow for volunteerism during work hours, outside of work, with family members, with teams of employees and individual volunteer projects.
- n **Empowerment** – Employees are empowered to find a project, lead a project, and recruit others to volunteer with them.
- n **Involve Employees to Oversee the Program** – Provide opportunities to involve employees. Some companies create an employee volunteer council to provide guidance on program policies and practices.
- n **Technology** – Medtronic has partnered with VolunteerMatch to create a Web site that serves as a one stop shop for all employee engagement questions. On the site, employees can search for volunteer opportunities, register for volunteer events, track hours, evaluate a program and access many other vital functions.
- n **Recognition** – Recognizing employees who volunteer either for the company or in the community is another important factor. Medtronic gives Momentum Awards. Momentum is defined as an impelling force or strength. The Mission in Motion Momentum Awards are designed to celebrate employees who put the mission in motion. These individuals and groups demonstrate outstanding volunteerism, a strong commitment to the community and inspire others to act. Momentum Awards are given to an outstanding individual, an extraordinary team and an inspiring manager.
- n **Partnerships** – Critical to the success of an employee volunteer program are the creation of internal and external partnerships. Internally, volunteer managers should connect with human resources, employee resource groups, internal communications, creative services, administrative assistants, management and the facilities team. External partnerships can include the nonprofit community, other companies, a local corporate volunteer council and other national groups that promote and encourage corporate employee volunteer programs such as Points of Light Institute, VolunteerMatch and others.

## Online Presentations

Seminar presentations are available online at:

[www.charitiesatwork.org/best-2007/presentations.htm](http://www.charitiesatwork.org/best-2007/presentations.htm)

## About Charities@Work™

Members of the Charities@Work coalition include America's Charities, Community Health Charities, Earth Share and Global Impact. Collectively, they serve as the cooperative voice of more than 2,500 of the nation's premier health, human service, environmental, educational and international relief charities.

Charities@Work provides employers with efficient and effective ways to expand or strengthen workplace giving campaigns and campaign management services ranging from strategic campaign planning to campaign implementation and support. The group also serves as a resource on selecting a fiscal agent for online giving as well as facilitating charities' involvement in campaign events.

## We're Here to Help You

Please contact us if you have any questions about enhancing your workplace giving campaign:

### Charities@Work™

7941 Yancey Drive  
Falls Church, VA 22042  
(877) 641-9191  
[info@charitiesatwork.org](mailto:info@charitiesatwork.org)  
[www.charitiesatwork.org](http://www.charitiesatwork.org)

### America's Charities

14150 Newbrook Drive, Suite 110  
Chantilly, VA 20151  
(800) 458-9505  
[www.charities.org](http://www.charities.org)

### Community Health Charities

200 North Glebe Road, Suite 801  
Arlington, VA 22203  
(800) 654-0845  
[www.healthcharities.org](http://www.healthcharities.org)

### Earth Share

7735 Old Georgetown Road, Suite 900  
Bethesda, MD 20814  
(800) 875-3863 ext. 14  
[www.earthshare.org](http://www.earthshare.org)

### Global Impact

66 Canal Center Plaza, Suite 310  
Alexandria, VA 22314  
(800) 638-8079  
[www.charity.org](http://www.charity.org)



## Seminar Participants 2008

ADP, Inc.  
Aetna Foundation  
ALCOA  
Allina Hospitals & Clinics  
America's Charities  
American Red Cross  
AmeriGives  
Ameriprise Financial  
Blue Cross Blue Shield  
Chicago Cares  
C.H. Robinson  
Clarian Health  
Community Health Charities  
CreateHope, Inc.  
Earth Share  
Ecolab  
Fannie Mae  
GE Healthcare  
Global Impact  
Handberg Consulting  
HP  
Hospira  
HSBC Bank USA /North America  
Inova Health System Foundation  
Kaiser Permanente  
Kraft Foods  
Massachusetts Institute of Technology  
Medtronic  
Morningstar, Inc.  
Network for Good

PledgeFirst  
Points of Light and Hands On Network  
Shorebank  
Thomson Reuters  
Travelers Companies, Inc.  
UBS  
United Airlines  
United Way of America  
UnitedHealth Group  
VolunteerMatch Solutions  
**Facilitator**  
The Consulting Network  
[www.theconsultingnetwork.com](http://www.theconsultingnetwork.com)

## 2008 Best Practices Advisory Council

Martha Field, Thomson Reuters  
Alissa Markert, United Airlines  
Dale Thompson, FINRA  
Andrew Tournant,  
UnitedHealth Group  
Andrea Gonzales, HP

The corporate members of the Advisory Council are responsible for directing the focus and content of this year's seminar. We thank them for their work and appreciate their counsel in making this seminar a success.