

SOCIAL IMPACT THROUGH EMPLOYEE ENGAGEMENT

Creating Impact-Driven Engagement Activities



At EVPA, we see that companies and CSIs primarily discuss how to drive business value and/or the value for employees through employee engagement. As little attention is being paid to the social impact, our ambition is to redirect the discussion to the design of social impact-driven employee engagement activities

Dr. Lonneke Roza
Karoline Heitmann
Steven Serneels
Priscilla Boiardi

OCTOBER 2018

ACKNOWLEDGMENTS

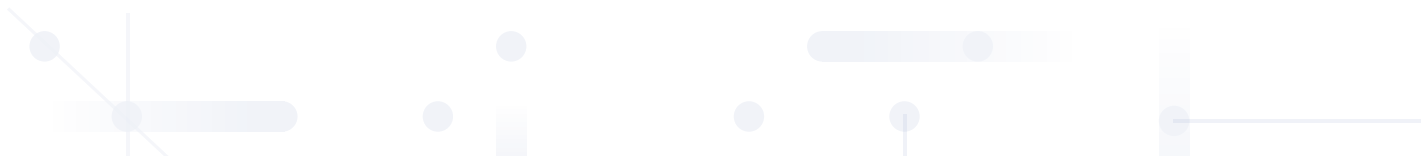
We would like to express our deepest gratitude to the contributors to this research, namely:

- Beyond Philanthropy
- Ernst & Young
- Halton-Bridge
- Impetus-PEF
- International Association for Volunteer Effort
- LGT Venture Philanthropy
- MovingWorlds
- NESsT
- Realized Worth
- University of Mannheim
- Yunus Social Business



TABLE OF CONTENTS

INTRODUCTION	5
STEP 1: DEFINE THE SPO'S PRIMARY NEEDS ... and design the most impactful engagement activity	6
Defining the SPO's Needs	6
Tool 1: Assessing the needs of the SPO	7
Tool 2: Designing the most impactful engagement activity	9
STEP 2: ASSESS WHAT YOU CAN OFFER ... and take a closer look at yourself, the company and its employees	10
Conditions	10
Tool 3: Mapping your assets	11
STEP 3: ANALYSE IF THERE IS A MATCH ... and see if you are ready for the most impactful engagement activity	14
Engagement activities and their ideal context	14
Tool 4: Matching the need with the offer	14
STEP 4: IDENTIFY YOUR ACTION STRATEGY ... and understand the potential of your role	16
APPENDIX	
1. Opportunities and risks of engaging employees	18
2. An overview of possible employee engagement activities	19
Engagement for awareness & visibility	20
Engagement for funding	21
Engage for operational support	22
Organisational resilience	24
Strategic development	26
3. Explaining the contextual dimensions	28



INTRODUCTION

Employee engagement activities organised by a Corporate Social Investor¹ (CSI) and/or a company are a popular method to support Social Purpose Organisations (SPOs), since corporate employees possess valuable human (i.e. skills, expertise or time), network and financial resources (i.e. donations or investments) that SPOs can benefit from.

Employee engagement is any formally organised support or encouragement from companies, albeit in varying degrees of collaboration with Corporate Social Investors (CSIs), to leverage employee resources (time, knowledge, skills or other resources such as money or network) to support SPOs. Employee engagement can vary from corporate volunteering (e.g. hands-on or skill-based, virtual or on site volunteering) and/or corporate giving (e.g. payroll giving, employee matching) to co-investment programmes.

Recently, experts in the field have started to raise concerns that many activities are in fact more corporate-driven than impact-driven (see Appendix 1 for a general overview of the potential opportunities and risks of employee engagement programmes). One of the reasons is that the design of engagement activities oftentimes starts with what a company and/or CSI wants to offer, rather than what an SPO actually needs.

While the opportunities of employee engagement are vast, the actual value of bringing in corporate employees is often overestimated, and –in many cases– based on assumptions rather than evidence. The misleading notion is that any form of employee engagement automatically creates a positive value for the SPO.

In line with EVPA's mission to enable venture philanthropists and social investors to maximise social impact through increased resources and expertise, we aim to redirect the discussion towards **how employee engagement activities can be designed and implemented to generate social impact.**

We talked to eleven EVPA members and experts from the field and raised the question: **How can employee engagement bring the most value to SPOs and their beneficiaries?** Based on these interviews, we developed a four-step process that helps CSI boards, CSI directors, and employee engagement managers to create impact-driven activities (see figure 1).

Within this toolkit, we will go through each step, explain what it entails and propose tools that help SPOs, CSIs and companies to collaborate better and achieve greater social impact through employee engagement. In the last step, we pay particular attention to what CSIs can do, given their overall role in employee engagement programmes we identified in the EVPA toolkit “Social Impact through Employee Engagement – Unravelling the Roles of Corporate Social Investors” and discuss how they can best utilise the outcomes of this tool.



If you are not directly involved in employee engagement (e.g. as an Observer or Adviser), you can still use this toolkit to conduct the analysis and see what your potential action strategies are.

At the end of this learning journey, you will be able to:

1. Understand how you can design the most impactful employee engagement activities to match SPOs' most important needs,
2. Analyse if you are in a favourable position to organise impactful engagement activities with SPOs,
3. Learn about how you can redirect the discussion and attention towards impact-driven engagement activities.



Figure 1: A 4-Step Process to Create Impact-Driven Engagement Activities

¹ A Corporate Social Investor (CSI) is any vehicle formally related to a company that aims to create social impact – i.e. impact-first or impact-only organisations linked to companies. E.g. corporate foundations, shareholder foundations, corporate social impact funds, corporate social businesses and corporate social accelerators

STEP 1: DEFINE THE SPO'S PRIMARY NEEDS

... and design the most impactful engagement activity



Employee engagement activities should always contribute value to SPOs to generate a positive impact. To do so, the first step is to look at what the most important needs of the SPO are.

Defining the SPO's Needs

Based on our interviews, we identify five different types of needs where employee engagement can offer financial and/or non-financial support to SPOs:



1. Awareness and visibility

For SPOs, it is important that people know about their organisation and the social issue they are tackling. Knowledge and awareness about a social problem are the first step to get people interested and engaged.



2. Funding

SPOs are always in need of funding. As management guru, Peter Drucker (1989) once said: "As a rule, non-profits are more money-conscious than business enterprises are. They talk and worry about money much of the time because it is so hard to raise and because they always have so much less of it than they need."



3. Operational support

Many SPOs are service delivery organisations that are in constant need of hands-on volunteers to carry out their daily activities. Operational support can help SPOs deliver more or better services to their beneficiaries.



4. Organisational resilience

Many SPOs need to strengthen their organisational resilience and improve their performance. SPOs' employees are sometimes in need of additional business skills, technologies and expertise.



5. Strategic support

Many SPOs are born out of a person's desire to tackle a particular social issue in society. The founder and the employees are driven by passion and a common vision. At times, however, they lack the proper managerial skills and strategic vision to develop their organisation and scale the impact.

Each of the SPO's needs can be delivered by the CSI and/or the company through various employee engagement activities, as shown in figure 2. For a full description of each activity, potential challenges and key success factors, please see Appendix 2.

Identifying the most important needs and impactful employee engagement activity for the SPO is however not an easy process. To guide you through it, we designed two easy-to-use tools to help you assess the SPO's needs and to define the best activity to tackle them.

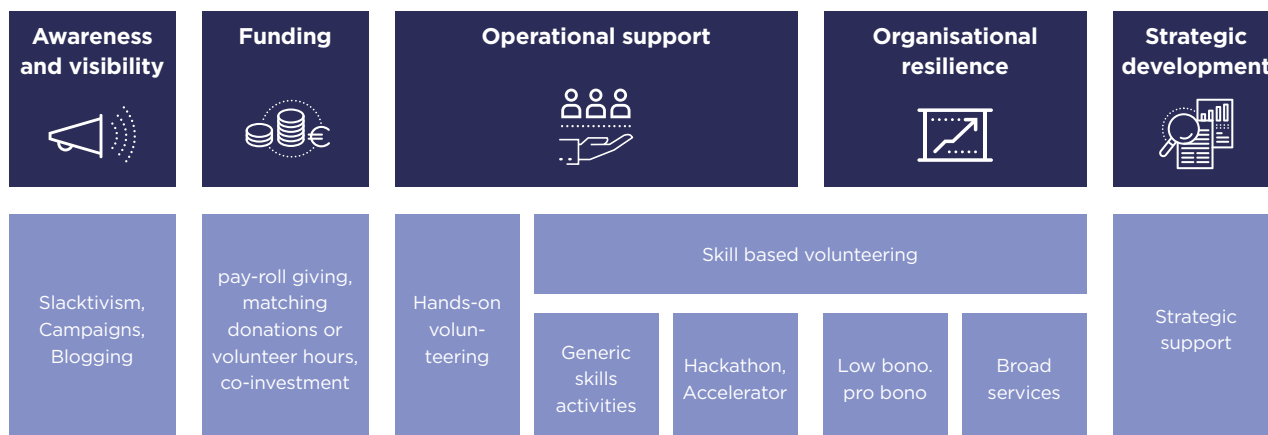


Figure 2: SPOs Needs and Suitable Employee Engagement Activities

Tool 1: Assessing the Needs of the SPO

Purpose

Not all SPOs can easily define or communicate the type of support they need. This assessment tool is a simplified version of EVPA's non-financial support plan², adapted to the context of corporate employee engagement. It will help you and the SPO jointly detect and define the most urgent needs. In particular, this tool helps you to:






- Guide the conversation with the SPO to help them define and communicate their needs,
- Map the SPO's specific needs, and
- Prioritise the most important ones.

As a result, you will have a straightforward visual representation of the most important SPO's needs in which corporate employees can be of support. This will be the foundation of an impactful employee engagement programme and help you in the following steps.

Instructions

Discuss with the SPO the five types of needs described above. Then start going into depth about each type of need and try to identify if the SPO has specific deficits in which they could use support. We provided a few guiding questions and examples to help you and the SPO in the conversation. Write down the specific deficits where the SPO could benefit from engaging employees and assign them a priority, from 1 (very important) to 3 (not very important).

² Boiardi, P. and Hehenberger, L. (2015), "Practical guide to adding value through non-financial support", EVPA. Available here: <https://evpa.eu.com/knowledge-centre/publications/adding-value-through-non-financial-support-a-practical-guide>

Type of Need	Guiding questions to the SPO	Specific deficit	Priority for the SPO? (1 to 3)
1. Awareness and visibility 	<ul style="list-style-type: none"> How would you describe the general awareness and visibility of your organisation and the cause you are supporting? What change would you like to see? How well known is your organisation locally, nationally, or internationally? Is your current awareness about your organisation and/or the cause inhibiting you from pursuing your social mission? 	e.g. promote the organisation in new countries, revive the discussion about a specific cause	
2. Funding 	<ul style="list-style-type: none"> How would you describe your current financial status? Is it resilient or vulnerable? How diverse is your portfolio? What aspirations do you have next to your current portfolio? Is a lack of funding inhibiting you from pursuing your social mission? 	e.g. €20,000 to support a new initiative, higher regular donations	
3. Operational support 	<ul style="list-style-type: none"> Does a lack of volunteers prohibits you from offering more or higher quality services or products? Do you have a number of simple tasks you could need a hand with? Is there anything you cannot do at the moment because you lack operational volunteers? 	e.g. 50 extra volunteers to serve at the food bank during holiday season, volunteers who can provide job interview training to the SPO's beneficiaries	
4. Organisational resilience 	<ul style="list-style-type: none"> In which functional area could you potentially need development (e.g. financial, human resources, IT support, communication)? Are there particular skills or expertise you are missing in your team (accounting, fundraising, legal, risk management, HR, marketing)? 	e.g. develop an HR plan linked to strategic planning activities, implement new IT solutions, increase the SPO's brand awareness, legal advice on a particular issue	
5. Strategic Support 	<ul style="list-style-type: none"> To what extent would the leaders of your organisation benefit from engaging with corporate employees? Have you thought about a 3-year and 5-year (strategic) plan? Have you thought about new markets and customer segments you would like to enter in the future? 	e.g. define a Theory of Change, conduct a market analysis, develop new products or services, develop an integrated impact management system	






Tool 2: Designing the most Impactful Engagement Activity

Purpose

This tool will help you and the SPO to match their particular needs with a concrete activity. Both you and the SPO will be guided in translating the general information from this section and Appendix 2 into concrete design implications.

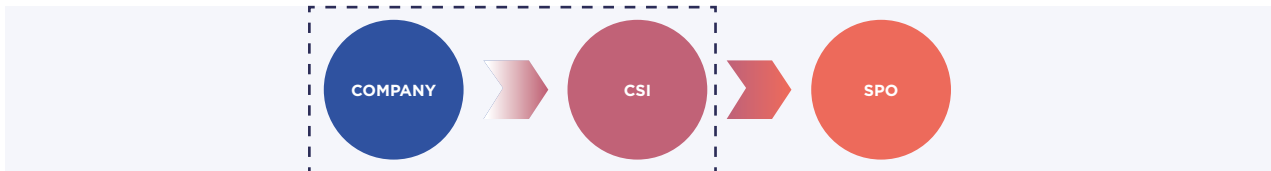
Instructions

In the following table, tick the box of the most important needs you identified with the SPO in Tool 1 (all needs with a priority of 1). Second, have a look at the Appendix 2 and read the full description of each activity. Think about which engagement activity would be most suitable for the SPO. Tick the box and write down the reasons why you think they are appropriate given the potential challenges. Lastly, think about how you could design the programme that would be most impactful. Write it down with the SPO so you can both align your expectations.

What is/are the SPO's most important need(s) <small>(priority 1 from Tool 1)</small>	What is the most suitable engagement activity for the SPO?	Given the potential challenges, why do you think it is the most suitable activity?	Based on the full descriptions, how would the most impactful engagement activity look like? <small>(scope, scale, duration, objectives, etc.)</small>
<input type="radio"/> Awareness and visibility 	<input type="radio"/> Slacktivism <input type="radio"/> Blogging <input type="radio"/> Campaigns <input type="radio"/> Other:		
<input type="radio"/> Funding 	<input type="radio"/> Pay-roll giving programmes <input type="radio"/> Matching programmes <input type="radio"/> Co-investment programmes <input type="radio"/> Other:		
<input type="radio"/> Operational support 	<input type="radio"/> Hands-on volunteering <input type="radio"/> Generic skill based volunteering <input type="radio"/> Hackathon <input type="radio"/> Accelerator <input type="radio"/> Other:		
<input type="radio"/> Organisational resilience 	<input type="radio"/> Low-bono or pro-bono service <input type="radio"/> Board service <input type="radio"/> Other:		
<input type="radio"/> Strategic Support 	<input type="radio"/> Refining the business model <input type="radio"/> Market and risk assessment <input type="radio"/> Other:		

STEP 2: ASSESS WHAT YOU CAN OFFER

... and take a closer look at yourself, the company and its employees



In Step 1, we helped organisers of employee engagement and SPOs jointly assess the most urgent needs of the SPO. Ideally, the organiser of the employee engagement would provide exactly the type of activity identified in Step 1. In reality, not all CSIs and companies are ready to provide all types of employee engagement. This step helps you to take a critical look at what you can offer to an SPO, based on the context that is shaped by your CSI, the company and its employees.

Context

If you want to know what you can offer, you need to take a close look at your context, including the conditions that are influenced by the company and its employees. Based on our interviews, we identified the following seven dimensions that can help you assess how successfully you can organise certain engagement activities in your context (see Appendix 3 for a full explanation):

1. **Allocation of resources** – as planning and monitoring is identified as a key success factor among our interviewees, this dimension looks at how much human resources you and/or the company have available to plan and monitor an activity.
2. **Accessibility to employees** – Given that the participation of many employees is not always beneficial to SPOs, this dimension looks at the extent to which you would accept an activity to be accessible to only a few selected employees.
3. **Degree of financial dispersion** – As employee engagement does not come without cost, it is important to consider how you want to allocate your financial resources. This dimension looks at the degree to which you and/or the company place importance on allocating the financial resources among employees.
4. **Employees' tolerance for complexity** – Given that some activities are more complex than others, this dimension looks at the extent to which the employees are willing and capable of participating in very complex and challenging activities.
5. **Employees' time commitment** – Even if employees are interested in participating in employee engagement activities, they might not be able to commit time. This dimension looks at the extent to which professional and private circumstances prevent employees from committing to employee engagement activities.
6. **Leadership support** – It is important to have your alliances within the company. This dimension looks at the extent to which leaders (from various levels and departments) of the company support engagement activities.
7. **Corporate policies and structures** – Some engagement activities can remove employees from their daily job for days, weeks and even months. This dimension looks at the extent to which the corporate policies and structures enable employees to participate in activities (or restrict them from doing so).

Tool 3: Mapping your Assets

Purpose

This tool will help you assess yourself, the company and the employees on the seven dimensions outlined above. Understanding what kind of activities you can generally offer to an SPO is the first step towards determining how you can manage their needs.

The results will help you in Step 3 to assess whether you and/or the company are ready to organise the ideal engagement type.

Instructions

For each of the dimensions, there are five statements describing various contextual situations in which you might find yourself. Select the answer that is closest to your context.

The letters in each column are not relevant yet, but you will need them for the next tool.

Note: *If you are not the organiser of the activity, you can ask the responsible person to help answer these questions or you can answer for them to the best of your knowledge.*

Contextual Dimensions	A	B
DIRECTLY RELATED TO THE ORGANISER OF THE ACTIVITY		
Allocation of resources	<input type="radio"/> Your resources are too limited to engage in impactful activities or you are not certain about how many resources you have.	<input type="radio"/> You have the resources to plan an activity but not to monitor.
Accessibility to employees	<input type="radio"/> You are not certain how accessible the activity should be.	<input type="radio"/> You and/or the company want to organise an activity that is accessible for (almost) all employees.
Degree of financial dispersion	<input type="radio"/> You have none to little financial resources.	<input type="radio"/> As the organiser, you want to spread your financial resources among as many employees as possible.
DIRECTLY RELATED TO EMPLOYEES		
Employees' tolerance for complexity	<input type="radio"/> You are not certain how much tolerance employees have for complex activities.	<input type="radio"/> The employees are not able to engage in complex activities. They are able to engage in activities that require low skills and expertise.
Employees' time commitment	<input type="radio"/> The employees are not able to commit any time to an activity or you are not certain how much time they would be able to commit.	<input type="radio"/> Employees are only able to dedicate very little time. Their working or private environment does not allow them to spend time externally at SPOs.
DIRECTLY RELATED TO THE COMPANY		
Leadership support	<input type="radio"/> You have no leadership support or you are not certain to what extent.	<input type="radio"/> You have only limited support from leadership within the company.
Corporate policies and structures	<input type="radio"/> Corporate policies and structures do not leave room for any engagement activities or you are not certain to what extent.	<input type="radio"/> Corporate policies and structures are relatively strict but leave some room to organise quick and easy activities that do not distract employees from their daily work.

C	D	E
<input type="radio"/> You have the resources to plan an activity and to monitor occasionally.	<input type="radio"/> You have the resources to extensively plan an activity and to closely monitor the activity over a medium-term duration.	<input type="radio"/> You have the resources to extensively plan an activity and to closely monitor the activity over a long-term duration.
<input type="radio"/> You and/or the company want to organise an activity that is accessible for the majority of employees.	<input type="radio"/> You and/or the company are willing to organise an activity that is accessible to a small group of employees.	<input type="radio"/> You and/or the company are willing to organise an activity that is accessible to only very few employees.
<input type="radio"/> You want to spread your financial resources among those employees, who want to be actively engaged with SPOs or their beneficiaries.	<input type="radio"/> As the organiser, you are fine to spread your financial resources to only a few employees if that helps the SPO.	<input type="radio"/> As the organiser, you are fine to spread your financial resources to only a few, high-level employees if that helps the SPO.
<input type="radio"/> Employees can handle some degree of complexity, but the activity should still require relatively little specific skills and expertise. Employees are able to apply generic skills.	<input type="radio"/> Employees are able to engage in complex activities, in which they can use their professional skills to solve problems.	<input type="radio"/> Employees are able to engage in even highly complex activities. They are used to challenging themselves and using their skills to solve complex problems.
<input type="radio"/> Employees are able to commit some time to SPOs, as long as it can be done within a few hours or a day. Thus, ad hoc activities to short-term projects are feasible to them.	<input type="radio"/> Employees are able to commit to activities that can last weeks or even a few months.	<input type="radio"/> Employees are able to commit several months to an activity.
<input type="radio"/> You have some support from the company's leaders. They endorse the activity and participants.	<input type="radio"/> You have a strong support from the company's leaders. They endorse the activity and see (professional) value for employees to participate.	<input type="radio"/> You have very strong support from the company's leaders. They endorse the activity and see (professional) value for employees to participate.
<input type="radio"/> Corporate policies and structures enable employees to (take some time off) to participate in employee engagement activities.	<input type="radio"/> Corporate policies and structures enable employees (to take a few weeks and even months off) to participate in employee engagement activities.	<input type="radio"/> Corporate policies and structures enable even high-level employees to take a few weeks and even months off to participate in employee engagement activities.

STEP 3: ANALYSE IF THERE IS A MATCH

... and see if you are ready for the most impactful engagement activity

At this point, you know how the impactful engagement activity would look like for the SPO and you assessed the context that influence which activities you can successfully offer. In this step, you will see if the ideal engagement activity is supported by your context or not.

Engagement activities and their ideal context

Each engagement activity has varying demands on the contextual dimensions introduced in the previous step. If you want to successfully organise an impactful employee engagement activity for the SPO, the company, the employees and yourself must all be ready to match those demands. Tool 4 helps you visualise if there is a match between the most impactful engagement activity and your context.

Tool 4: Matching the Need with the Possibilities

Purpose

This tool will help you connect Step 1 and Step 2. In particular, this tool helps you to:

- Place yourself on the contextual dimensions discussed in Step 2,
- Understand what activities you can offer successfully in your organisational context, and
- Assess if you can match the SPO's needs and organise the most impactful engagement activity.

Instructions

Each answer from Tool 3 corresponds to a letter from A to E, indicated by the column. In the tool below, tick the box (A to E) on each dimension that corresponds to your previous answers in Tool 3.

Evaluation

To see if your context is ready for the engagement activity, assess if each one of your scores is located below the most impactful activity for the SPO or higher (whether your score is higher or lower than what the activity requires is indicated by the direction of the arrow). If you scored an A, you are not ready for an activity yet.

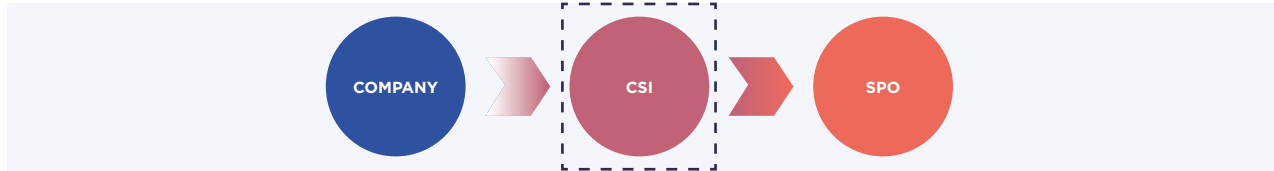
Do all of your scores match the ideal engagement activity for the SPO?

- **Yes:** Your analysis revealed that your context is ready. You and/or the company can organise an impact-driven engagement activity.
- **No:** Your analysis revealed that there is a gap between what the activity would require and what you and/or the company can currently offer. Don't worry, your journey doesn't end here. There are still things you can do to redirect the attention towards impact-driven employee engagement.

In the next step, you will learn how CSIs in particular can take action, given their overall role in employee engagement programmes.

STEP 4: IDENTIFY YOUR ACTION STRATEGY

... and understand the potential of your role



From Step 1 you know the most impactful engagement activity for your SPO and from Step 2 you have a clear idea about your context. In Step 3 you assessed how feasible the most impactful engagement activity is. In this last step, you will learn what the various action strategies of Corporate Social Investors (CSIs) are in creating impact-driven employee engagement activities, given their overall role in employee engagement programmes.³

There are two scenarios that can occur: first, your context ideally aligns with the most impactful employee engagement activity to the SPO. Second, there is no (or not enough) alignment between what the SPO needs and what you are able to do. If we plot these two scenarios against the different roles of CSIs, we get to the following strategic options (see Figure 3).

		OBSERVER	ADVISOR	CO-CREATOR	DRIVER
Does your context aligns with the most impactful engagement activity for the SPO?	YES. This means you and/or the company can organise the most impactful engagement activity for the SPO.	Coach the SPO to lead a successful negotiation with the company.	Be the matchmaker and endorse the activity	Lobby for the activity, then organise the activity.	Organise the activity.
	NO. This means that there is a gap between what the most impactful engagement activity is for the SPO and what you and/or the company can offer.	Match the SPO with another CSI or company.	Make the introduction and advise on the gaps.	Lobby for bridging the gaps.	Lobby for bridging the gaps.

Figure 3: Connecting the CSI roles with the Contextual Analysis

³ To determine what your role is or could be in employee engagement, you can use "Social Impact Through Employee Engagement – Unravelling the Role of Corporate Social Investors".



Coach the SPO to lead a successful negotiation with the company

Your opportunity lies in coaching the SPO to negotiate the organisation of an impact-driven engagement activity. You can give them the right contact person, help them to communicate the social value of the activity, but also the business value. By conducting the exercises throughout this toolkit with the SPO, you have given them the information they need to see which activities are of help to them, and how they should be organised to generate the highest impact. Coach them in how they can best use that for their negotiations.

Match the SPO with another CSI or company

When the company and/or the employees are not the right match for the activity, you can use your independence and think about other companies or CSIs in your network that could be ready to organise this particular engagement activity. Give them this toolkit to assess if they might be a better match. Sharing your network and knowledge is certainly an important element of being a CSI. If you want to do more, go back to Toolkit 1 and see what you can do to change your role in employee engagement.



Be the matchmaker and endorse the activity

Use the relationship you have with the company to facilitate an introduction with the SPO. Outline the reasons why the company should consider organising this type of activity with the SPO in terms that are relevant to them. Think about what their objectives are and how the engagement type you propose can tie in with that. It might also help to explain how you came to design the most impactful engagement activity and why it is important for the SPO, to make sure their interests remain protected throughout the process.

Make the introduction and advise on the gaps

If you think the mismatch can be resolved, introduce the SPO and the activity to the company. Help them understand what the engagement activity would require and what they are still missing. You can guide them through a learning journey how to become ready and impactful. If you do not think the mismatch can be resolved, see if you can find other CSIs or companies that could provide this kind of support to the SPO. Give them this toolkit to assess their own readiness. Only as a last resort, go back to Step 2 and conduct the feasibility analysis for the next most important need. If you want to do more, go back to Toolkit 1 and see what you can do to change your role in employee engagement.



Lobby for the activity, then organise the activity

Your opportunity lies in being a vocal spokesperson for the SPO and the activity to convince the company to organise the impact-driven employee engagement activity with you. Since you know the company very well and you work closely together, communicate how the engagement type you propose ties in with both your objectives and why you are convinced that this activity should not be neglected.

Lobby for bridging the gaps

Lobby for changing the conditions that currently do not support the SPO's needs. Use the collaborative relationship you have with the company and your expertise to drive change within the company and shift the focus back to impact-driven employee engagement. Only as a last resort, go back to Section 2 and conduct the feasibility analysis for the next most important need.



Organise the activity

What are you waiting for? You have everything you need to create impact with employee engagement.

Lobby for bridging the gaps

Lobby for changing the conditions that currently do not support the SPO's needs. Use the collaborative relationship with the company and expertise to drive change within the company and shift the focus back to impact-driven employee engagement. Only as a last resort, go back to Section 2 and conduct the feasibility analysis for the next most important need..

APPENDIX 1

Opportunities and risks of engaging employees

Opportunities

- **Additional funding:** SPOs are always in need of additional funding for their operations. Engaging employees can help SPOs reach new donors.
- **Increased capacity:** employee engagement programmes can help SPOs provide better and/or more services to beneficiaries.
- **Knowledge transfer:** through employee engagement programmes, SPOs can develop particularly business skills and acquire further knowledge and expertise.
- **Gateway to future collaboration:** employee engagement programmes can be a starting point for future collaboration between the CSI and the SPO or between the corporate employees and the SPO.
- **Increased visibility and awareness:** SPOs can target corporate employees and their extended network to raise awareness about social issues and their contribution. This helps them build legitimacy for the issue and for the SPO as an organisation.

Risks

- **High transaction costs:** building and nourishing relationships with CSIs or hosting many volunteers requires SPOs to dedicate a lot of time, energy and resources.
- **Mismatch in competences:** especially in volunteering programmes, corporate employees might not have the sufficient skills or experience to provide the right service to the SPO.
- **Harmful effects on beneficiaries:** even if employees have advanced technical skills, they may not have the right soft skills to deal with an SPO's visionary staff, or vulnerable beneficiaries, such as disadvantaged children. As Mark Horoszowski, co-founder and CEO of MovingWorlds, explains: "Sometimes, if an outsider comes in for a short-term project without adequate planning and preparation, it can be perceived as disruptive, create harmful power dynamics, and/or erode dignity. Care must be taken to adequately prepare both sides".
- **Loss of time and resources:** many SPOs feel pressure to organise entertaining and fun activities for corporate employees to pave the way for future collaborations. The organisation of such activities can however be very time consuming and might even drain resources from the SPOs' core activities. Especially when the intended future collaboration does not happen, they lose valuable time and resources.
- **Reputational damages:** SPOs are very vulnerable to scandals and to negative public opinion. Organising an employee engagement programme with an unethical or scandalous company can be damaging to their reputation.
- **Unfinished projects:** sometimes employees cannot finalise a project because their availability changes or the predetermined duration ends. In those cases, there is a risk that the work remains of no use for the SPO and all previous investments from the SPO are lost.
- **Conflicts:** corporate employees and SPO employees often speak completely different languages and work at different paces. Communication and collaboration can therefore be difficult but also cause tensions and frustrations on both sides.

APPENDIX 2

An overview of possible employee engagement activities

As introduced in Step 1, SPOs' needs can be delivered by the CSI and/or the company through various employee engagement activities. The following section will help you understand which activities are suitable for each particular need.



Be aware:

Not all activities automatically produce the desired outcome. We therefore highlight potential challenges and the success factors you should keep in mind when organising the activities.



What is it and how does it work?

Employee engagement targeted at raising awareness and visibility focuses on informing individuals about SPOs or a social cause. They can help educate a large number of employees around a certain issue, inform them on why it is important to become active, provide visibility to the work of particular SPOs and inspire individuals to become active for a cause. This type of activity is usually easy for employees to participate in, requires little time commitment and targets a broad audience.

Engagement activities include:

- **Slacktivism** – supporting a political or social cause on social media or through online petitions – e.g. likes or hashtags on social media;
- **Blogging** – writing about experiences or social issues from a personal perspective;
- **Campaigns** – large-scale planned activities with the primary purpose of raising funds – e.g. C&A's Inspiring World Campaign in which employees are asked to share their stories of a better world. For each story shared, C&A Foundation makes a donation.

How do you make this a success?

To make awareness and visibility engagement activities work, there are a few key success factors that both the organiser and the SPO should keep in mind:

- **Design it as a gateway for future engagement** – the direct impact of those activities on SPOs is very limited, but they are ideal to get many employees engaged and inspired. Therefore, use this form of engagement as a starting point and catalyst for future, more impactful, employee engagement, not as the ultimate way of creating social impact.
- **Make it appealing and relevant** – if you want people to engage in an action, make sure it is either fun for them, and/or evokes an emotional connection. Both fun and emotional reactions are powerful tools to bring people together. A good instrument for doing so is setting up a campaign or organising a competition. You could invite employees to write a short blog on the issue, or make a photo of what they associate with the social issue. The winner may –for instance– nominate which SPO will receive the donations.

EXPERT ADVISE

Fiona Halton, expert in corporate engagement campaigns, shared with us some pointers that can strengthen a campaign⁴:

- **Make it voluntary** – making campaigns compulsory may help you get many people involved, but the message or value will not stick and the employees will not live it. If you make it compulsory, you will not get that significant uplift.
- **Make it accessible** – make sure you create an action everyone can take part in. If your campaign involves technology, think about whether it is accessible to all your employees.
- **Make it shareable on social media** – build a lasting tribute to your employees' participation that people can share and be inspired by in the future. You can build a website featuring all contributions, which people can access even after the campaign to see their colleagues' actions and be even more inspired.

What are the challenges?

- **The direct impact on the SPO is often limited** – most awareness campaigns focus on a larger social issue rather than a particular SPO. They have the potential to change the entire ecosystem around a social issue and create a momentum for a cause, but consequently provide less visibility to an individual SPO.
- **It can be difficult to make a long-term impact** – since it entails changing the ecosystem around a social cause, this type of engagement needs a proper long-term planning around how these awareness activities spark employees' interest to engage further. Awareness in itself, if not followed by actions, is often not enough to provide meaningful support to an SPO. Without any follow-up, there is little chance that a one-time event will lead to a deeper understanding of the social issue. Nor will it spark real engagement about the social issue at hand.

⁴ For more information, see Fiona Halton's book: "The Spark Effect: How one single action can engage and inspire your people"



What is it and how does it work?

Employees can provide support to SPOs by sharing their financial resources through donations or co-investments in a social enterprise. Most of these engagement activities require little (additional) effort from employees and can involve a large group of employees. The more people are involved in this type of engagement, the higher the impact on the funding streams of SPOs.

Engagement activities include:

- **Pay-roll giving programmes** that automatically deduct a certain amount or percentage from an employee's salary;
- **Matching programmes** that match the hours people volunteer in their own community (e.g. dollars for doers) or match what employees give through the pay-roll giving programme;
- **Co-investments programmes** for social enterprises in which employees invest their financial resources based on impact investing, and may seek a (limited) financial return next to impact generation.

How do you make this a success?

- **Focus on the long term** – support the chosen SPOs on a longer term and make sure that the SPO is involved. This helps them to plan ahead and have some stability about when and how much funding they can expect.
- **Do not underestimate the importance of administrative tools** – make sure there is a solid administrative tool at hand that makes it easy for SPOs to receive the financial support.
- **Make it complementary** – engaging employees for funding should never be the only way of income for an SPO. Advise the SPO on having a portfolio of organisations and/or individuals financially supporting them. This makes fluctuations in employee engagement giving less volatile for them and the SPO less dependent on one source of funding.

EXPERT ADVICE

Additionally, **Klara Kozlov**, Head of Corporate Clients at Charities Aid Foundation, recommends using the following behavioural nudges to get more people engaged in funding⁵:

- **Make it easy** – one of the best way to encourage people to give is by making it easy. For example, automatically enrol new senior staff in giving schemes (with the option to opt out).
- **Attract attention** – make giving more attractive to the individual by using personalised messages or rewarding donations through matching funding schemes.
- **Focus on the social** – individuals are more likely to give if the people around them already give. Make the act of giving more visible to others to create peer effect and establish group norms.
- **Timing matters** – make sure that you ask at times that are most appealing to employees. For example, people are more likely to give in December than in January.

What are the challenges?

- **Resource intensive to organise** – while pay-roll giving seems attractive to offer, it also requires a close collaboration with the human resources department and bears quite some administrative work. Matching volunteer hours can also be financially costly for CSIs and/or companies to do. It can therefore be difficult to offer this kind of support to several SPOs simultaneously.
- **Be aware of the impact trade-off** – the more latitude you give employees to choose the SPO or a cause to support, the more likely they are to participate. At the same time, this makes it difficult to provide targeted support to one SPO. If you want to have very focused single-issue programmes, you need to be aware that participation rates and financial contributions might be lower.

⁵ For more information, please download the report from Cabinet Office and Charities Aid Foundation (2013). Available here: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/203286/BIT_Charitable_Giving_Paper.pdf



What is it and how does it work?

Employee engagement targeted at engaging corporate employees for operational support, involves employees in an SPO's daily activities. They help SPOs deliver more or better services to their beneficiaries by lending a hand or using some generic skills.

Engagement activities include:

- **Hands-on volunteering**, such as serving food in a soup kitchen, visiting elderly people, or ocean beach clean-ups, that do not involve any workplace skills;
- **Generic skill based volunteering**, usually based on personal (and social) skills of the volunteer, such as reading to small children or mentoring youngsters in distress.

How do you make this a success?

- **Integrate corporate volunteers** – make sure the operational support is integrated into the daily routines or existing practices of the SPO. Adding new activities only for corporate employees unnecessarily burdens SPOs.
- **Cover any additional costs** – if the engagement activity cannot be integrated into existing structures, make sure you cover the additional costs that arise from organising this.
- **Make it simple** – make sure that the chance that people need specific skills or expertise in the actual activity is as small as possible.
- **Focus on quality, not quantity** – quantity does not always equal quality. Do not overburden SPOs by engaging as many employees as you can.
- **Design it as a gateway for future engagement** – the long-term impact of activities on SPOs is very limited if the activities are only organised for one day or very sporadically. However, they are ideal to introduce employees to volunteering and get them excited. Therefore, use this form of engagement as a starting point and catalyst for future employee engagement.
- **Consider the SPO's beneficiaries** – operational support is needed, but you need to take into account the beneficiaries the employees would engage with. Think about their well-being and if they would benefit from short-term interactions.

EXPERT ADVISE

According to **Chris Jarvis**, co-founder and Chief Strategy Officer of Realized Worth, the success of this type of engagement should include the transformative affect on the individual employees themselves. Effective approaches to employee volunteering will consider the change that takes place in the person helping as well as the person being helped enabling people to be more empathetic and understanding of social issues. Operational support is an excellent means to that end, as he explains: *“Focus on the personal transformation of the volunteer. Instead of exchanging time or resources for the reward of making a difference, guide people to a space where there is potential to become more pro-social human beings with a greater capacity for empathy. When we ‘belong’ to each other in community we address the underlying obstacle to peace and prosperity; the problem of ‘us’ and ‘them’. We must move beyond this posture of charitably helping the ‘other’ while maintaining our separateness. We must know the solidarity of humanity.”*⁶

⁶ For more info, follow Chris Jarvis' free online course: Empathy in Motion: The Power of Employee Volunteering. Available here: <https://open.sap.com/courses/pev1>

What are the challenges?

- **Making a lasting impact** – operational support seems to be the easiest way to support an SPO, but that is mostly true from a corporate perspective. Think of volunteering days, serving food at a soup kitchen or going to the museum with elderly people. Many people can partake and many people are served, but usually for a very short amount of time. If you want to have a lasting impact on the SPO, you need to organise those activities regularly.
- **Don't get sidetracked by participation rates** – a lot of the engagement activities in this category develop into large-scale programmes that focus more on getting as many people involved as possible instead of generating as much impact as possible. However, Lorrie Foster, Advisor and Facilitator at the International Association for Volunteering Effort remarks: "What I have seen is that sometimes it can be more work for a non-profit to arrange a volunteer day, pull their staff off their work to manage volunteers. And what is the outcome for them? Sometimes it costs them more than they gain". CSIs have to take into account that the (financial) costs of organising such short-term events may be higher than the actual service that is delivered by corporate employees.
- **Don't leave a gap behind** – research has shown that although keeping lonely people company for a day may seem nice, they can actually feel lonelier after such an activity. If you engage employees in this type of activities, make sure that the volunteers don't leave a gap behind that might be hard for the SPO to fill, neither emotionally nor physically. If that happens, you might end up having a negative impact on the SPO and its beneficiaries.



What is it and how does it work?

Support in building capacity is best provided through skill-based volunteering. Unlike the generic skills used to provide operational support, this type of engagement opportunity relies on the employee's professional skills.

The goals of this form of volunteering are:

- To **consult** the SPO on specific topics – such as legal issue, or by giving one-off IT support; or
- To **coach** the SPO's employees and transfer the skills and expertise that they need to strengthen their organisation's resilience and improve their performance.

Engagement activities include:

- **Hackathons and accelerators** – half or full day events in which employees work in interdisciplinary teams to develop solutions to very concrete questions from SPOs;
- **Low-bono** (very reduced tariff) or **pro-bono** (for free) services, in which employees are assigned to a particular project;
- **Board services**, in which corporate employees serve on the board of an SPO.⁷

How do you make this a success?⁸

- **Select with caution** – not everyone has the proper professional and personal skill-set to serve SPOs. Make sure there is a proper selection procedure in place and collaborate closely with HR.
- **Endorse participants** – to get the best people on board for this, make sure it has a competitive element and is linked to career benefits. It also helps to have leadership endorsements.
- **Train volunteers** – make sure you train the corporate employees on how to be an effective skill-based volunteer who knows how to coach and listen. Activities that coach an SPO to develop organisational skills, which they can use autonomously in the future, are the ones that create the biggest and longest-lasting impact. With board services, train the corporate employee in his or her role at the board. Being valuable in a board is not a given if an employee performs well in their role at the company.

EXPERT ADVISE

To make sure the programme has a lasting impact beyond the activities' duration, MovingWorlds applies a particular **assessment criterion**, as **Mark Horoszowski**, co-founder and CEO, explains: *"Our volunteers only work on something that is not just a vague idea. They always support a current project or training, because we have realised that this helps to transfer skills to the local team. This way, the local team can benefit from the engagement even after the volunteers leave and the project creates a real lasting impact. We therefore always screen whether the project is part of the organisational strategy and has already dedicated some resources and time to bring it to fruition".*

Roxana Damaschin-Tecu, Director of Portfolio at NESST, stresses that **corporate volunteers should be carefully selected and trained**. They look for individuals that are empathetic, have good communication skills, intrinsically motivated, and expert on the area and field, but most importantly, there must be a **good personal chemistry** between the corporate volunteer and the SPO's employees. Corporate volunteers should always be properly trained in being an effective skill-based volunteer, in particularly coaching skills.

Lastly, **Elisabeth Paulson**, Portfolio Director at Impetus-PEF, underlines the importance of supporting SPOs in **becoming "engagement ready"**: *"At Impetus-PEF, we work with each SPO to ensure they learn how to best manage a pro-bono activity in order to get the most out of the project. It is important that they are not just passive recipients – but pay careful attention to align expectations around resources, deliverables and scope, and learn how to work closely with the partner along the way to ensure everything stays on track. Otherwise you the pro bono partner may have this amazing project, but it may not be what the SPO needs or can absorb."*

⁷ For a more extensive list of the skills the corporate employees can provide to support the SPO in organisational resilience, see: Tool #1 in Boiardi, P. and Hehenberger, L. (2015), "Practical guide to adding value through non-financial support", EVPA. Available here: <https://evpa.eu.com/knowledge-centre/publications/adding-value-through-non-financial-support-a-practical-guide>

⁸ These key success factors do not account for the accelerator or hackathon as it very short term and mostly anyone can participate.

4. **Stay engaged** – these types of activities are intense for the volunteers and the SPO’s staff, so make sure you plan the activity carefully and monitor the progress closely. If problems arise, act as a moderator and help them find solutions.

What are the challenges?

- **The more intense the engagement, the more complex to organise** – CSIs must be aware that organising impactful capacity building programmes is not easy and costly, as skill-based volunteering is usually the most intense form of engagement with the SPO. This can be the source of conflicts and frustration on both sides.
- **Beware of the cultural clash** – corporate employees speak a different language than SPOs’ employees, work at a different pace, and have different working customs. If the engagement process is not managed and monitored carefully, it may lead to a disappointment. As Mark Horoszowski, co-founder and CEO of MovingWorlds further explains the clash of cultures and mind-sets: *“Without proper expectation setting and preparation, volunteers can inadvertently create a lot of harm. They can come in with their “big ideas”, for example using a new programming language that no one knows how to use but then leave before the project is completed, leaving the local organisation with a code it does not know how to maintain. Very often, when outsiders come in to develop their own “big ideas”, they fail, whereas those that seek to empower local efforts and transfer skills make real and lasting change”.*
- **Creating an impact beyond the duration of the activity** – skills-based volunteering really works only when it leaves a mark. Although SPOs welcome pro-bono services, as it grants them access to highly skilled employees who’s services they normally would not have access to, Elisabeth Paulson, Portfolio Director at Impetus-PEF, observed that *“The risk is without careful co-creation and alignment of objectives, the excellent work produced by corporate employees conducting a pro-bono project for the SPO can end up as a report on a shelf”.* In her experience, SPOs oftentimes fail to define their needs and deliverables before the project begins and let the company and/or CSI be in the lead of the programme design. In the end, SPOs then have no real use for the outcomes.



What is it and how does it work?

Engagement activities can help SPOs in building a stronger business strategy and support the SPO's CEO and top-management.

Engagement activities include:

- **Refining the business model** – corporate employees can help SPOs be more efficient, effective and sustainable. For instance, they can help them refine their long-term strategy, sustainable revenue streams, and define new market entry strategies. In most cases, this involves brainstorming with the (board of) director(s) or management team of the SPO on new business development and/or strategic planning.
- **Market and risk assessments** – corporate employees can help assess the challenges the SPO will face in the future, how their environment will change, or where the SPO's strengths and weaknesses lie.

How do you make this a success?

- **Cautiously select** – select only the most talented and experienced management executives for this task. This support cannot be provided by a talented trainee. The selected employees should also have soft traits such as empathy. Being technically good in a job does not suffice.
- **Train volunteers** – as with capacity building activities, make sure you train the corporate employees, mostly about coaching skills. It is all about coaching not telling if you want to have a lasting impact. Do not assume that all experienced executive managers also know how to effectively work with an SPO or vice versa. Inform both sides about what is expected and where they might experience potential points of conflict.
- **Provide opportunities to reflect** – include a few moments of reflection into the process, both individual reflection moments with the corporate executive as well as the SPO's executive. In addition, some reflection on the process with both in the room is also a nice additional element. Make sure they really understand each other throughout the process.
- **Prepare an exit phase** – especially activities of longer duration, volunteers can leave a big gap in the organisation if they leave and there is no proper handover to the SPO's employees. Make sure you plan enough time for that.

EXPERT ADVISE

Engaging employees to offer strategic support to SPOs should be based on coaching and consulting, not telling. **Fiona Halton**, CEO of Halton-Bridge, explains why this is so important: *“Corporate employees do not know how to run a foodbank. So they should never tell. They should coach and impart the knowledge and skills they have. But ultimately, they should always respect the SPO's understanding of their beneficiaries and their knowledge to work within the space they are in.”*

Marc Moser, Impact, Talent & Operations Manager at LGT Venture Philanthropy, shared with us how they came to the decision to design activities for a one-year duration and how they structure it, to make sure that they create a lasting impact on the SPO: *“We have tested six, 12 and 18 months engagement durations with our volunteers. Based on our experience and the comprehensive feedback we collected, around **one year is a good amount of time** for people to come on the ground, work with the company and **really drive change**. On the other hand, we restrict it to one year because we do not want to impact the normal job market. So our activities should still be a temporary support. The one-year duration is then split in **three phases**. It usually requires three months for the volunteer to understand how the business runs, how he or she can bring value in the best possible way, to build relationships with his colleagues and supervisors and start performing. Then you have about a six-month period, where the volunteer really get things done, builds things, trains people, and adds value to the SPO. In the last three months, the volunteer should start with the **exit phase** and think about the **handover**, so you make sure that what the volunteer has done and built also remains in the company.”*

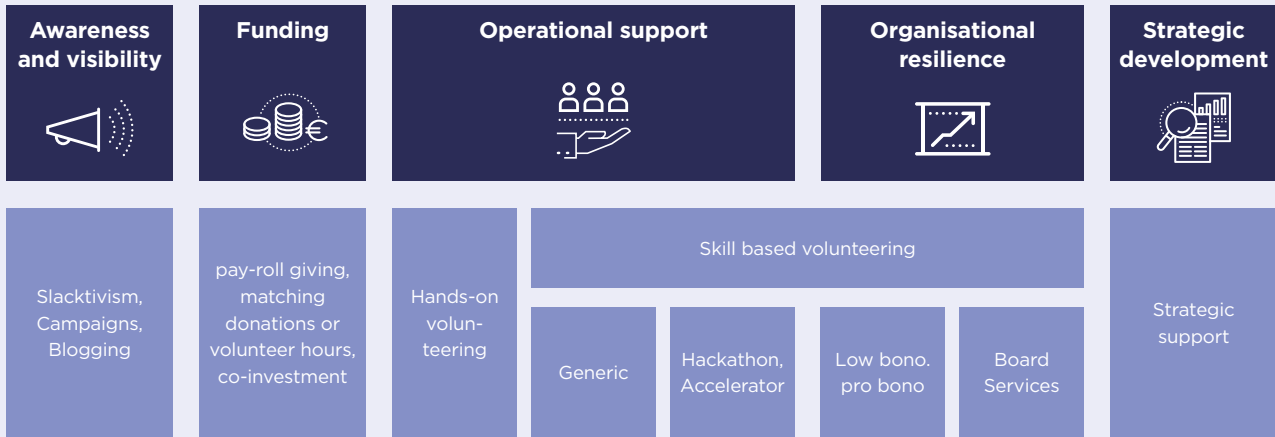
- **Train the SPO to be engagement ready** – make sure you prepare the SPO about what to expect and the potential challenges that might arise. If they want to make the most of the activity, they should always be in the lead and make sure that they have sufficient resources to implement solutions and follow up on them.
- **Stay involved** – to make sure this type of engagement goes well, the CSI or company must stay involved throughout the programme and extensively monitor the development over the whole duration of the activity. If they do not have the capacity to do so themselves, they might want to hire an independent intermediary.

What are the challenges?

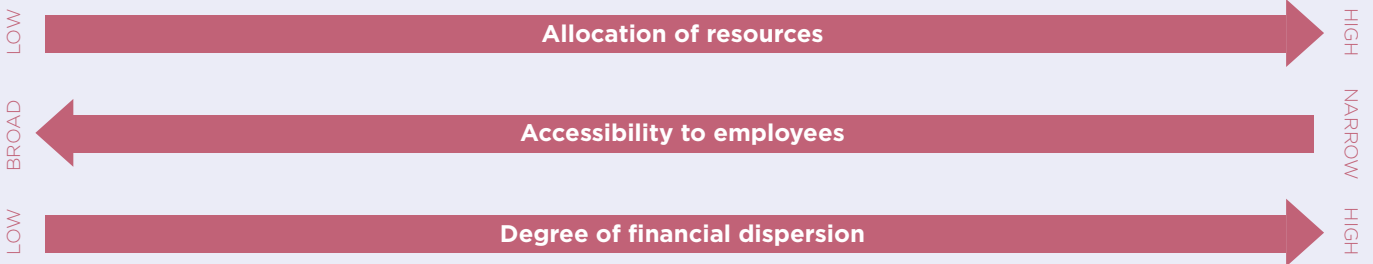
- **Only accessible for a few, highly skilled employees** – most corporate employees are not suitable for this type of engagement. Only a small group of experienced executive managers have the proper skills to consult SPOs in their strategic development. Even then, experienced employees also need to have specific social skills to be able to quickly integrate in a new environment, understand the context and develop a strategy with the CEO together.
- **Be aware about the culture clash** – as with capacity building programmes, corporate executives speak a different language, have different working customs and work at a different pace than SPO executives. Repeatedly corporate employees inflict their own ideas on the SPO and tell them what to do, instead of acknowledging their expertise and developing the strategy jointly.
- **Unfinished projects** – the availability of executive employees may quickly change and they have to terminate the project prior to the agreed upon date. The SPO will not only be left with an unfinished project, but also with a loss of time and other resources.

APPENDIX 3

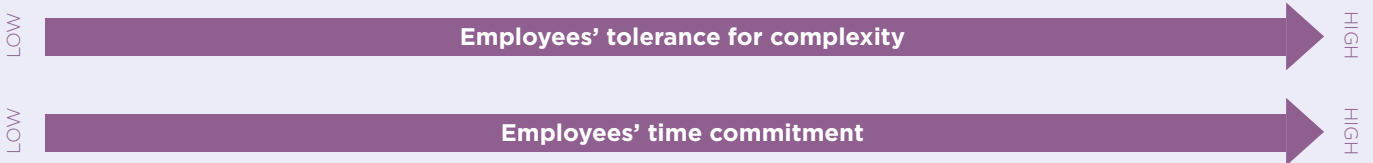
Explaining the contextual dimensions



DIRECTLY RELATED TO THE ORGANISER OF THE ACTIVITY



DIRECTLY RELATED TO EMPLOYEES



DIRECTLY RELATED TO THE COMPANY



1. Allocation of resources

All activities on the spectrum must be carefully planned. However, the more activities are on the right side of the spectrum, the more intense and longer the engagement between the corporate employee and the SPO and thus the closer you need to monitor the activity's progress. If problems arise, you need to have the resources to intervene and adjust the activity if necessary. Not having the sufficient resources can have severe negative consequences for the SPO. CSIs and/or the company must consider if they have sufficient resources to stay adequately involved over the activity's entire duration.

2. Accessibility to employees

Engagement activities on the left side of the spectrum can easily be organised for a large group of employees. For those activities, an increasing number of participants is also beneficial to the SPO. The more the activities are on the right side of the spectrum, the less accessible they are for employees and the less SPOs benefit from growing participation rates. CSIs and companies must consider how important it is for them to make the activity broadly accessible to the employees.

3. Degree of financial dispersion

The degree of financial dispersion, meaning the number of participants you can involve with a given budget, varies along the spectrum. On the left side of the spectrum, the investment per participant is relatively low in comparison to the right side of the spectrum. Therefore, the CSI and/or the company can involve many employees with a fixed budget. The costs of organising skill-based volunteering can quickly rise up to thousands or ten-thousands of euros per volunteer, particularly if employees are sent on a three- or six-month assignment. This means that, for the same investment, CSIs and/or companies can allocate a fixed budget amongst fewer employees. No option is better or worse, but they must consider how much money they are willing to spend per corporate employee.

4. Employees' tolerance for complexity

Activities on the left side of the spectrum are not very complex to engage in and have little (to no) demand on the employee's professional or personal skills. Skill-based volunteering activities, on the other hand, are more complex and require particular professional skills. Strategic support activities on the right side of the spectrum are the most complex, as they have the highest demand on employees' professional and soft skills.

CSIs and companies must consider if their corporate employees match the particular skill profile and if they are also interested in engaging activities of a particular complexity.

5. Employees' time commitment

Activities on the left side of the spectrum can be done within a few minutes. The more the activities are located on the right side of the spectrum, the more time employees have to commit to an activity. Even if employees are interested in participating in employee engagement activities, they might not be able to commit time due to personal and/or professional constraints. For example, not all employees can leave their daily job or family for several weeks. The CSI and/or the company must consider if their corporate employees are able to match the time commitment that is required by the activity.

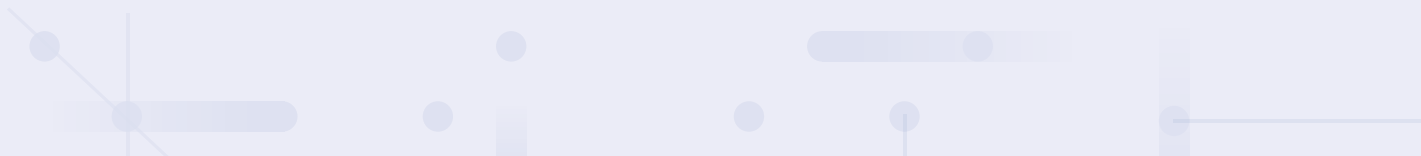
6. Leadership support

If you want to be engaged in the organisation of an activity, it is crucial to consider how strong your alliance with leaders from the company is. The activities on the left side of the spectrum are relatively little dependent on vocal leadership support. The more activities are based on the right side of the spectrum, the more employee participation depends on the support of leaders. If leaders do not acknowledge the importance of employee engagement activities and do not endorse participants, the less likely it is that employees will be able and willing to participate in projects over a long duration. For strategic support activities, CSI and/or companies must consider if leaders are also willing to engage themselves.

7. Corporate policies and structures

Engagement activities on the left side of the spectrum only have minor impact on the employees' daily work, if any. Corporate policies and structures are therefore likely to support this type of engagement. The more intensive activities on the right side of the spectrum have a longer duration and often take the employees out of their regular jobs for weeks and even months. Leadership in all layers of the organisation should be on board to allow employees to take paid time off from their daily tasks, transfer to another organisation for the project's duration and to be reintegrated after completion. CSIs and companies must consider to what extent the corporate policies and structures enable employees to participate in activities (or restrict them from doing so).

Handwriting practice lines consisting of 20 horizontal dotted lines.





WITH THE FINANCIAL SUPPORT OF

C&A Foundation





EVPA

Rue Royale 94
1000 Brussels, Belgium
Tel: +32 (0) 2 513 21 31
Email: knowledge.centre@evpa.eu.com

EVPA.EU.COM

 **@EVPAupdates**

 **@_EVPA_**