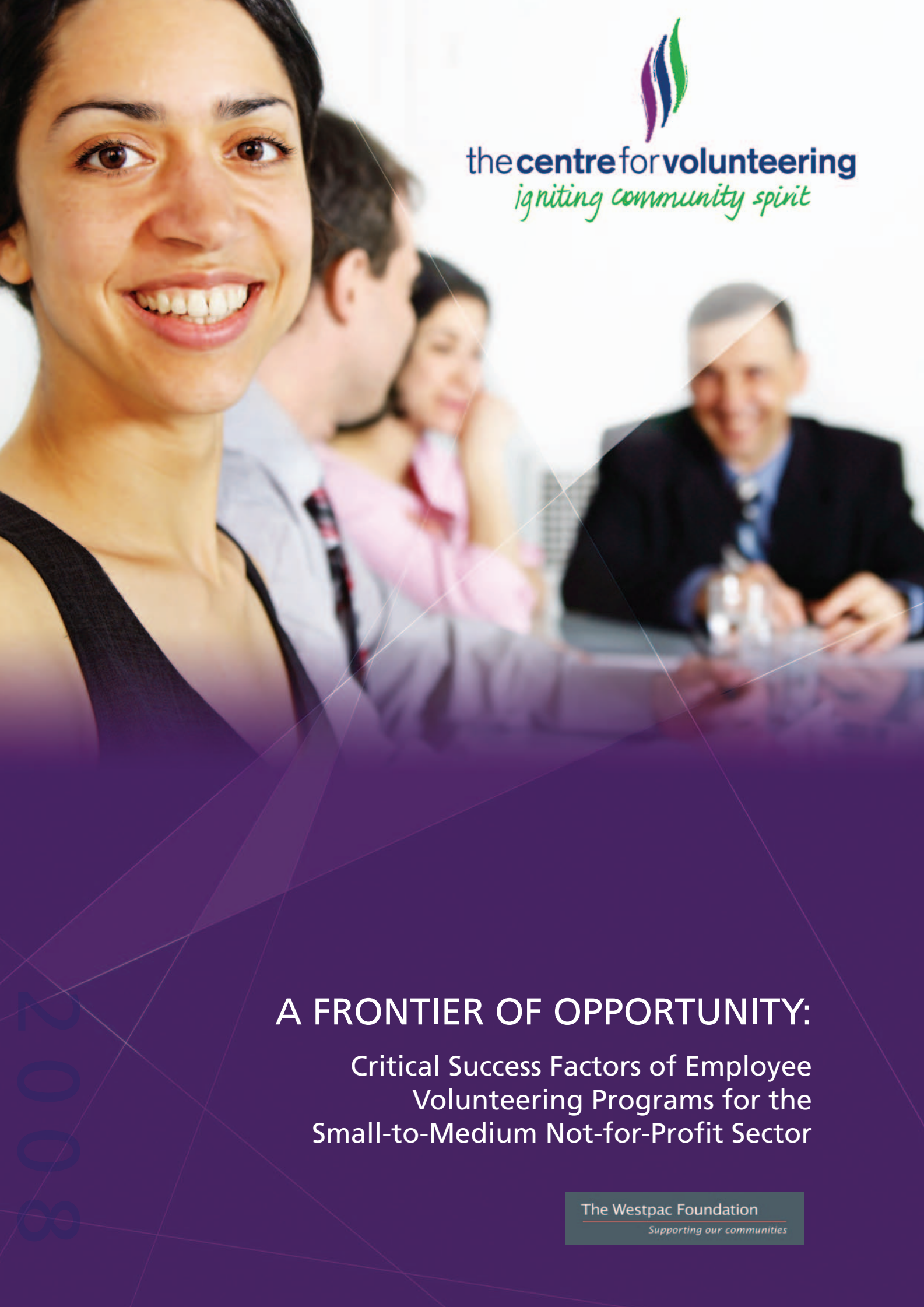




the **centre** for **volunteering**  
*igniting community spirit*



## A FRONTIER OF OPPORTUNITY:

Critical Success Factors of Employee  
Volunteering Programs for the  
Small-to-Medium Not-for-Profit Sector

The Westpac Foundation

*Supporting our communities*

2008

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**The Westpac Foundation**

*Supporting our communities*



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# Glossary

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**Corporation** – a large business, as defined by the Australian Bureau of Statistics (ABS), which employs 200 or more people<sup>1</sup>.

**Corporate Social Responsibility (CSR)** – the continuing commitment by business to behave ethically and contribute to economic development while improving the quality of life of the workforce, their families and the local community and society at large<sup>2</sup>.

**Employee Volunteering Program (EVP)** – part of a commitment to corporate social responsibility where employees are given paid leave to volunteer for community-based work during normal business hours.

**Medium Not-for-Profit (NFP) Organisation** – a business employing 20 or more people, but fewer than 200 people<sup>1</sup>.

**Not-for-Profit (NFP) Organisation** – for charitable purposes only and its constitution will require the company to apply its income in promoting those purposes, prohibit the company making distributions to its members and paying fees to its directors and requires its directors to approve all other payments the company makes to them<sup>3</sup>.

**Small Not-for-Profit (NFP) Organisation** – a business employing fewer than 20 people<sup>1</sup>.

**The Centre for Volunteering (The Centre)** – NSW peak body for volunteering representing 16,000 active members and about 40,000 registered volunteers together with 500 member organisations.

**Toolkit** – consulting, support services, case studies, policy templates and training.

**Volunteer** – a person who provides a service through a formal organisation without remuneration by choice and for the benefit of the community.

**Westpac Foundation (Westpac)** – income from the Westpac Foundation is distributed to not-for-profit organisations for specific projects and for the relief of financial hardship of retired Westpac staff<sup>4</sup>.

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- 1 1321.0 - Small Business in Australia, 2001, 7th ed. 2002, Australian Bureau of Statistics, retrieved 30 January 2008, <<http://www.abs.gov.au/AUSSTATS/abs@.nsf/Lookup/1321.0Main+Features12001?OpenDocument>>
  - 2 What is corporate responsibility?, The Corporate Responsibility Index, developed by Business in the Community, is an initiative of St James Ethics Centre, The Sydney Morning Herald and The Age, retrieved 30 January 2008, <[http://www.corporate-responsibility.com.au/about/corporate\\_social\\_responsibility/what\\_is\\_csr.asp](http://www.corporate-responsibility.com.au/about/corporate_social_responsibility/what_is_csr.asp)>
  - 3 Special purpose companies, Australian Securities and Investment Commission, retrieved 30 January 2008, <<http://fido.gov.au/asic/asic.nsf/byheadline/Special+purpose+companies?openDocument>>
  - 4 Origins of the Foundation 2008, Westpac Banking Corporation, retrieved 30 January 2008, <<http://www.westpac.com.au/internet/publish.nsf/Content/WIWCWF+Origins>>

# Executive Summary

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The Centre for Volunteering received a grant from the Westpac Foundation to research corporate Employee Volunteering Programs (EVPs) in NSW. The Centre for Volunteering is the peak body for volunteering in NSW representing more than 32,000 registered volunteers and more than 500 not-for-profit, corporate and school members. The aim of the research is to determine the critical success factors of engagement between corporate EVPs and small-to-medium not-for-profit (NFP) organisations. These critical success factors identified by the project will be used by The Centre to both develop and disseminate a toolkit that will help more NFPs successfully engage with corporations offering EVPs.

International research demonstrates that EVPs are becoming increasingly popular and are a mutually beneficial activity for NFPs and corporations. In Australia, a similar trend is occurring as noted by the Federal Government's Community Business Partnership initiative, which stated "the business sector has increasingly acknowledged that, not only can it make a significant contribution to building a dynamic and strong community, but there are measurable benefits to be gained by the business when community investment activities are aligned with long-term business objectives."

"Benefits like increased morale, higher attraction and retention rates of staff, improved reputation and greater customer loyalty are all tangible returns from corporate philanthropy and employee engagement."<sup>5</sup>

A frontier of opportunity: Critical success factors of employee volunteering programs comprises two concurrent streams: one researches the NFP sector; the other addresses the corporate sector. From the perspective of business, there has been some research on how to present an attractive case to encourage involvement, identify benefits and find effective ways of measuring the impact of EVPs. There is comparatively less research about and support for the activities of the NFP sector on how to build effective and sustainable partnerships with business.

Some key findings from this research are that NFPs rate the commitment of volunteers as important. Volunteers' reliability also contributes to the success of the EVP. Moreover a key point to the success of an EVP is the relationship between NFPs and corporations. Good communication, clarity of purpose and direction, understanding each other and good management were also significant themes for the NFPs. Mutual benefit was achieved via skills and experience exchange. Some stated good planning of a project is also a crucial factor.

Many NFPs stated having enough time to manage volunteers is a challenge. This includes establishing relationships, training volunteers, organising events and meeting corporate needs. These additional tasks to a NFP's normal routine could become more time-consuming when the expectations from both sides are not the same.

Many NFPs wanted direction on how to set up an EVP, how to manage an existing EVP, how to expand an EVP or how to write manuals and policies. The Toolkit, developed as part of this project, addresses these issues by providing a self assessment tool, examples and templates of policy and procedure documents.

From the corporate perspective EVP programs which have a 'bottom up' approach seem to be very successful because the employees decide themselves on how they want to be engaged in CSR. However, a long-term commitment by senior management and a holistic approach are also crucial for the success of corporate EVPs. The corporate employee volunteers need to feel they participate in decision making and their recommendations will be championed and acted on by an internal decision maker.

Work/life balance is also considered to be very important and the EVP can contribute to this need if there is variety and flexibility in the program.

Input from both the NFPs and corporations is considered vital to establishing formal guidelines, which can structure the program effectively and increase the enthusiasm for participation. This also identifies

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5 Corporate Giving and Employee Engagement, retrieved 31 January 2008, <[http://www.partnerships.gov.au/philanthropy/employee\\_engagement.htm](http://www.partnerships.gov.au/philanthropy/employee_engagement.htm)>

the elements within NFPs and corporations which can help them join and work together to achieve common long-term goals.

Below are the common factors and their criteria (established by this project) that need to be in place if an EVP is to be successful.

- Experience: a minimum of 2 years.
- Relationships and Partnerships: establish and maintain long-term partnerships with more than one partner. Identify and clearly communicate expectations.
- Broker/Intermediate: if experience is lacking use an intermediary.
- Resources: confirm adequate resources are available to set up, manage, train staff or expand an EVP).
- Support: there is a direct connection between available resources and support required.
- Promotion and Recognition: publicise the EVP widely.
- Employee Involvement: staff need to be trained to manage the EVP.
- Leadership and Management: ensure policies and procedures are documented and in place for both staff and volunteers.
- Feedback: provided feedback to your partner on a regular basis.
- Evaluation: monitor and evaluate the EVP on a regular basis.
- Contribution to local community: EVPs can contribute to the organisations' position in the wider community.
- Contribution to Image, Morale and Mission: look for partners that use the EVP to improve their image and morale while it contributes to achieving their mission.

# 1. Introduction

---

This report presents the findings of a research project on critical success factors of Employee Volunteering Programs. These findings will assist small-to-medium NFPs to make the best use of the opportunities that an effective EVP presents to them.

Findings of this research will be used by The Centre for Volunteering to develop an EVP Toolkit and an EVP Training, Consulting and Support Service, targeting NFPs wanting to establish an EVP or seeking to improve, manage or expand their existing EVP.

It is expected that the long-term impact of this research will increase the number and quality of small-to-medium NFPs that could benefit from EVPs in NSW, while corporations will also be able to use this empirical data to start, manage or improve their EVPs.

## 2. Methodology

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This project used a case study methodology comprising qualitative and quantitative methods to identify critical success factors of EVPs. The Centre for Volunteering firstly conducted an analysis of critical factors as they apply to the business sector by using data from CSR reports, and annual reports of NSW businesses. It then undertook key informant interviews with EVP coordinators, who provided further detail on their programs. This information assisted in determining how relevant specific steps are to a successful program.

A Steering Committee was established, comprising volunteers, representatives from local small-to-medium not-for-profit organisations, corporations, academia in Australia and New Zealand, Volunteering Australia, Volunteering UK and The Centre for Volunteering. Its role was to approve the methodology, oversee the rigor of the research, review and approve ethics, offer guidance, assist with development of the surveys, review reports and assist in the development of a toolkit.

Parallel questionnaires were designed, with the assistance of the Steering Committee, for the purpose of extracting information to determine commonly successful activities in both NFPs and corporations engaged in EVP programs. Full copies of the questionnaires are available on the Toolkit CD.

The questionnaires were divided into the following sections:

- Section 1. Organisational Profile and Current EVP Activities (NFP & Corporate)**
- Section 2. Leadership and Management (Corporate)**  
Mission and Vision (NFP)
- Section 3. Understanding and Collaboration (Corporate)**  
Leadership and Management (NFP)
- Section 4. Understanding and Collaboration (NFP)**  
Open Questions (Corporate)
- Section 5. Open Questions (NFP)**

While the questions in the initial sections of the questionnaires required quantitative responses, with occasional qualification, there was room for the respondent to relate qualitative information in sections 4 (Corporate) and 5 (NFP).

Volunteers were recruited by The Centre's Volunteer Referral Service to undertake the surveys by telephone interviews lasting approximately 40 minutes each. Interviewers were supplied with a list of either NFP or corporate interviewees to contact (provided to the interviewer on the basis of their previous experience with either the NFP or Corporate sector).

A pilot survey was used to determine the validity of the methodology, scripts and questionnaires together with key informant interviews with corporate and not-for-profit EVP coordinators. The actual survey phase was implemented between May and October 2007. Because data from the pilot survey returned results consistent with the overall results it has been included in the final report.

The Centre attempted to interview 2,500 NFP organisations and 150 corporations. Responses to questionnaires used in this research are confidential. All abridged case studies of EVPs have been developed with consent and in collaboration with involved parties.

Tables 1 and 2 provide the total raw data collected from NFP and corporate enterprises. NFPs were chosen from The Centre for Volunteering's members, Volunteering ACT members, Active Sydney List ([www.active.org.au](http://www.active.org.au)) and the Australian Charities Fund list. Corporations were chosen from the Australian Securities and Investment Commission.

**Table 1. NFPs**

<b>Number of NFPs</b>	<b>NFP Responses</b>
580	No EVP
453	N/A
2	Refusals
70	Completed Interviews
<b>1105</b>	<b>Total</b>

Note: N/A in the NFP results indicates that the organisation was contacted but could not, for various reasons, provide information regarding their involvement with an EVP at which time contact was terminated.

**Table 2. Corporations**

<b>Number of Corporations</b>	<b>Corporate Responses</b>
11	No EVP
37	N/A
1	Refusals
36	Completed Interviews
<b>85</b>	<b>Total</b>

Note: N/A in the Corporation results indicates that the organisation was contacted but did not provide information on its EVP.

## 3. Responding organisations

This section of the report profiles the organisations responding to the survey, as determined by their responses to the quantitative questions of the surveys. It addresses NFP responses first and is followed by the corporations' responses.

### Not-for-profit (NFP) organisations

#### ■ Industry, location and size

Of the 70 NFP organisations that nominated their involvement in an EVP in the survey (Table 3.1), the majority (40) were community welfare organisations. Health (13) and Education/Youth development (6) were the next most common industries reported.

Sport and Recreation is the highest user of volunteers by organisation according to the ABS<sup>6</sup>. However, results showed that NFPs in the Sport and Recreation sector are not heavily engaged with EVPs. Only two EVPs operated in the Sport and Recreation sector.

**Table 3.1. NFP Sectors**

NFP Sectors	Number of NFPs
Community welfare	40
Sport and recreation	2
Health	13
Arts/culture	2
Emergency services	3
Education/youth development	6
Advocacy organisations/Interest Groups	1
Other	3
<b>Total</b>	<b>70</b>

The majority of head offices of the NFPs (55) were located in the Sydney metropolitan region. Of the remaining 15, four were located in regional New South Wales, five interstate and six elsewhere.

The size of the NFPs participating in the survey covered a broad range (Table 3.2). While the majority (42) had 50 or fewer employees, 19 NFPs had more than 100 employees, including seven organisations with over 500 employees.

**Table 3.2. NFP staff numbers**

Staff	No.
1-10	22
11-50	20
51-100	9
101-499	12
500+	7
<b>Total</b>	<b>70</b>

6 Voluntary Work, Australia, 2006 Latest ISSUE Released at 11:30AM (CANBERRA TIME) 20/07/2007, retrieved 31 January 2008, <<http://www.abs.gov.au/ausstats/abs@.nsf/Latestproducts/4441.0Main%20Features22006?opendocument&tabname=Summary&prodno=4441.0&issue=2006&num=&view=>>>

## ■ Experience of EVPs in NFPs

Participating NFPs had considerable experience with EVPs (Table 3.3), the majority (39) responding that their organisations had been engaging with an EVP for more than five years. Only 11 had less than two years' experience.

**Table 3.3. Experience with EVPs**

Years of experience with EVPs	Number	%
0-1 years	5	7
1-2 years	6	9
2-5 years	20	29
More than 5 years	39	56
<b>Total</b>	<b>70</b>	<b>100</b>

NFP interviewees were asked to respond to a series of statements about their organisation's preferred relationships with corporations, indicating whether they thought the statements were true or false (Table 3.4). There appeared to be a clear preference for establishing long-term partnerships, and with more than one corporation. There was a strong view that a combination of short- and long-term relationships with corporations is even more valuable. It was clear that those responding did not wish to rely on a long-term relationship with only one corporation, or to be working with a number of corporations on a short-term basis.

**Table 3.4. Preferred relationships with corporate organisation**

Preference	Yes	No	Total
a. You prefer to establish long-term partnerships with only one corporate.	6	64	70
b. You prefer to establish long-term partnerships with more than one corporate.	54	16	70
c. You prefer to work with a number of corporations on a short-term basis.	13	57	70
d. You prefer a combination of short- and long-term partnerships with a number of corporations.	57	13	70

Of the 70 NFPs, only 10 had ever discontinued or suspended an EVP. Their reasons were:

- The NFP program discontinued
- The NFP program changed due to an ageing client group
- Changes in staffing at the NFP or corporate meant a loss of consistency
- The NFP was unable to cope with the number of people provided by the corporate
- Some volunteers are not suitable for particular programs (reported by two NFPs)
- The corporate was promoting its business in preference to the volunteering activity
- The corporate cancelled due to problems such as transport, logistics and weather.

Brokers or intermediaries had been used at some time by 11 of the NFPs to help set up and run their EVP. Of the 57 organisations who had never used such assistance, three could not find a suitable broker and nine considered the fees too expensive; 25 NFPs had sufficient internal resources to do the work themselves.

**Table 3.5. Reasons for not using a broker**

Use of a broker or intermediary	% (n=70)	
Broker fees too expensive	9	16
Could not find a suitable broker	23	40
Had sufficient internal resources	25	44
<b>Total</b>	<b>57</b>	<b>100</b>

## ■ Resources and support needed

NFPs were asked about resources their organisations needed in relation to EVPs. Only 14 said that they had all the resources they needed. Of the other 56:

- 39 wanted training and materials on how to set up an EVP.
- 45 wanted training and materials on how to manage an EVP.
- 53 wanted training and materials on how to expand an EVP.

NFPs were also asked about the type of support their organisation needed in relation to EVPs. Again, 14 NFPs reported that they did not need any support. Among the other 56:

- 40 wanted support on how to establish partners.
- 38 wanted support on how to write manuals and policies.
- 51 wanted support on how to expand a current EVP.

## ■ Goals and motivation of NFPs in relation to EVPs

A series of statements were tested with NFP participants about their mission and vision in relation to EVPs, with participants being asked to say how true these statements were of their organisations (Table 3.6). Responses revealed:

- Both the knowledge and expertise of corporate partners, and the possibility of financial support, appear to be strong motives for NFPs in relation to EVPs. However, 20 of the 50 NFPs disagreed that their primary motivation related to knowledge and expertise, and 25 disagreed that their primary motivation related to possible financial support.
- The majority of NFPs (61) were seeking to develop long-term partnerships with corporations, extending beyond the volunteer involvement of employees. Consistent with this, most NFPs (53) reported that they would welcome senior managers from their EVP partner onto their board or advisory committees.
- Generally, NFPs believed they had clear expectations of relations and had communicated these clearly to corporations (only 9 disagreed with statement 14). Further, they generally believed they had clearly stated what they offered in return (only 13 disagreed with statement 15).

**Table 3.6: Mission and vision of NFPs in relation to EVPs**

<b>Motivation, expectation and reasons for engaging in an EVP</b> – Bold numbers relate to Questionnaire questions to assist in further analysis by readers, which can be found on the accompanying CD.	<b>Yes</b>	<b>% (n=70)</b>
<b>11.</b> Your primary motivation for seeking corporate volunteers is that they have particular knowledge and expertise that can help you achieve your goals.	50	71
<b>12.</b> Your primary motivation for involving corporate volunteers is because you believe that there will be financial support for your organisation.	45	64
<b>13.</b> You seek to develop long-term partnerships with corporations which extend beyond the volunteer involvement of their employees.	61	87
<b>14.</b> You have clearly stated expectations of what you hope to achieve through your relationship with corporations.	61	87
<b>15.</b> You have clearly stated what you offer to corporations in turn for their support.	57	81
<b>16.</b> You would welcome corporate senior managers to be on your board or advisory committees.	53	76

Yes responses equates to the total number of respondents that replied “Mostly true” or “Completely true” (n=70) in the NFP Questionnaire.

## ■ Leadership and management of EVPs

Leadership and management issues were explored by testing NFP participants' levels of agreement with statements about:

- Publicising volunteers and corporate partners
- Ongoing management of relationships, and regularity of feedback to corporate partners
- Training of volunteers and the availability of volunteer job descriptions
- Development opportunities for staff and volunteers
- Family involvement
- Information and communication
- The range of volunteer opportunities

The results are presented in Table 3.7. This table begins to reveal some anomalies in responses. While responses so far have revealed a commitment to fostering partnerships, and a desire to be supported to improve them, it is seen here that while at least one staff member has the responsibility for managing relationships with companies in most (63) cases, only 48 NFPs provide staff training for this role, and only 25 provide orientation and training for volunteers. Job descriptions for volunteers are not provided by 27 NFPs.

**Table 3.7 Management of EVPs by NFPs**

Management, training and promotion	Yes	% (n=70)
<b>17.</b> You publicise your corporate volunteers and partnerships in your annual report and on your website.	57	81
<b>18.</b> At least one of your staff has, as part of their job description, the responsibility for managing your relationships with companies.	63	90
<b>19.</b> Your staff is trained in developing effective partnerships with corporations.	48	68
<b>20.</b> You have orientation and training programs specifically for corporate volunteers.	25	36
<b>21.</b> Your own staff and volunteers have a chance to develop and practise their project management skills in your EVPs.	42	60
<b>22.</b> You actively seek to involve families of corporate employees in your programs.	21	30
<b>23.</b> You provide information about your volunteering opportunities:		
a. Internet (e.g. homepage, e-newsletter)	59	84
b. Newsletters (e.g. newspaper)	43	61
c. Public announcements (e.g. radio, TV)	24	34
d. Other (reasons for false responses are shown below)	28	40
<b>25.</b> You have job descriptions of the work corporate volunteers will do.	43	61
<b>26.</b> You are prepared to provide short notice, short-term group volunteer opportunities (reasons for false responses are shown below).	59	84
<b>27.</b> You are prepared to provide group volunteer opportunities that can be used for leadership development or team-building purposes.	48	69

Yes responses equates to the total number of respondents that replied "Mostly true" or "Completely true" (n=70) in the NFP Questionnaire.

Respondents were also asked how regularly they liaised with corporate partners to get feedback:

- 5 reported that they never received feedback
- 23 received feedback once or twice per year
- 18 received quarterly feedback
- 24 received monthly feedback.

A number of NFPs provided reasons why they weren't able to provide last minute, short-term EV opportunities to corporations. These include:

- The NFP needs more volunteer consistency, otherwise too many resources are required and there is a loss of time due to the training required.
- There are time limitations – no tasks are available.
- The nature of the work requires a roster for all volunteers (the NFP's client must always come first).
- Involving corporate teams can double the workload of the NFP.

These responses need to be taken into account by corporations wanting to sensitively engage their EVP with an NFP organisation.

## ■ Evaluation of EVPs

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Evaluation of EVPs was reported as being carried out 'annually' by 26 organisations and 'never' by 17 organisations. A further 10 organisations reported that it was 'too early to undertake an evaluation' and 17 gave other responses to the question.

Other questions which asked about feedback and evaluation revealed a mix of approaches, with external evaluation the least used:

- 4 reported an evaluation conducted by an external evaluation agency
- 11 NFPs reported that an evaluation of the EVP was conducted exclusively by their corporate partner
- 28 reported an evaluation conducted collaboratively with their corporate partner
- 30 NFPs gave corporations information on the knowledge and skills that their volunteers had learned in the NFP
- 51 NFPs conducted evaluations of EVPs using an internal team.

## Summary of benefits of EVPs as reported by NFPs

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NFPs saw many benefits to their organisation arising from their participation in EVPs, which included benefits to the local community.

In relation to their community context:

- 32 said it was 'mostly' or 'completely' true that the EVP contributed to the economic development of the local community
- 47 said it was 'mostly' or 'completely' true that the EVP improved their relationship with local and surrounding business
- 50 said it was 'mostly' or 'completely' true that the EVP improved social relations with the local community.

In relation to benefits to their organisation:

- 59 NFPs said it was 'mostly' or 'completely' true that the EVP improved their organisation's image and morale.
- 63 NFPs said it was 'mostly' or 'completely' true that the EVP impacted positively on their organisation's financial performance
- 67 NFPs said that it was 'mostly' or 'completely' true that the EVP assisted their organisation to implement its mission.

In terms of relations with corporate partners, 37 NFPs reported that their partners were formally involved in planning volunteer activities.

**Table 3.8: Benefits of EVPs reported by NFPs**

<b>Organisational and Community Benefits</b>	<b>Yes</b>	<b>% (n=70)</b>
<b>34.</b> Your EVP improves your relationships with local and surrounding businesses.	47	67
<b>35.</b> Your EVP improves social relations with your local community.	50	71
<b>36.</b> Your EVP contributes to the economic development of your local community.	32	46
<b>37.</b> Your EVP improves your organisation's image.	59	84
<b>38.</b> Your EVP improves your organisation's morale.	59	84
<b>39.</b> Your EVP assists your organisation to implement your mission.	67	96
<b>40.</b> Your EVPs impact positively on your organisation's financial performance.	63	90
<b>41.</b> Your corporate partners are formally involved in pre-planning volunteer activities.	37	53

Yes responses equates to the total number of respondents that replied "Mostly true" or "Completely true" (n=70) in the NFP Questionnaire.

## Corporate Organisations

Of the 85 corporate organisations contacted, 36 participated in the survey. These were organisations that had EVPs and gave employees paid time off to volunteer. The terms corporation, volunteering and EVP are defined in the Glossary at the beginning of this report.

### ■ Industry, location and size

Of the 36 corporations, there were 12 in finance or insurance, eight in property or business services and five in manufacturing industries (Table 3.9).

**Table 3.9. Industry of corporations**

<b>Industry Sector</b>	<b>No.</b>
Mining	1
Manufacturing	5
Electricity, gas, water	1
Communication services	3
Finance, insurance	12
Property, business services	8
Health, community services	1
Personal, other services	1
Other	4
<b>Total</b>	<b>36</b>

Two-thirds (24) of these organisations had head offices in the Sydney metropolitan area, with one in regional NSW. Interstate head offices were reported by five organisations and 'other' locations by six.

The corporate organisations were, not surprisingly, much larger than the NFPs, with two-thirds (24) having 500 or more employees (Table 3.10) compared to one-tenth of NFPs (see Table 3.2).

**Table 3.10. Numbers of employees of corporations**

Full-time Staff	No.
1-10	3
11-50	
51-100	3
101-499	6
500+	24
<b>Total</b>	<b>36</b>

## Experience with and nature of Employee Volunteer Programs among Corporations

Ten corporations had fewer than two years experience with EVPs; 11 had 2-5 years experience, and 15 had more than five years experience (Table 3.11).

**Table 3.11: Corporations' experience with EVPs**

Range of years implementing an EVP	No.
0-1 years	5
1-2 years	5
2-5 years	11
More than 5 years	15
<b>Total</b>	<b>36</b>

The majority of the corporations generally targeted more than one social group or cause with their EVP (30) with only six reporting that they targeted just one specific group or cause.

Corporations were asked to nominate which groups or causes best described the focus of their EVP, and the diversity of their responses is indicated in Table 3.12. Community welfare services (32), youth issues (28) and environment (27) were the most frequent responses but a range of other issues were receiving attention from a large proportion of these EVPs.

**Table 3.12. Focus of EVPs**

Sector EVP participates in	Number of EVPs that include this focus
Animal Welfare	17
Arts/culture	14
Community/welfare services	32
Education	20
Emergency services	11
Environment	27
Health	10
Indigenous issues	16
Religious	5
Youth issues	28
Other	4 responses provided: CSR in Business Women with children Sport Disability

Note: Total does not equal total respondents (n=36) due to an allowance for multiple answers.

Information was sought about the types of activities the corporate organisations undertake with the NFPs (see Table 3.13).

**Table 3.13: Corporations' Activities with NFP**

Supporting activity other than an EVP	No.
Giving in-kind products (e.g. mobile phones)	27
Giving support for fundraising activities	31
Giving skilled professional services (e.g. marketing, accounting, program development)	33
Providing outdoor activities or building (e.g. gardening)	28
Doing painting and decorating activities	26
Mentoring and supporting a not-for-profit's client groups	26
Other activities	23

Other types of philanthropic or Corporate Social Responsibility activity undertaken by corporations include:

- Employee donations matched by the corporation
- Foundation for grants to community groups
- Safety officers deliver safety education in schools
- School mentoring program
- Workplace giving (dollar for dollar)
- Teacher for a Day program.

## ■ Corporate staff and their EVP

Corporate respondents were asked to estimate the percentage of staff involved in their EVP. Most reported that between 10% and 15% of staff were engaged in EVPs, but other estimates spread right across the range from 1% to 100% of employees involved in EVPs.

**Table 3.14: Percentage of corporate staff involved in EVPs**

Range of staff participation	% (n=36)
0–5	5
5–10	
10–15	13
15–30	9
30–45	
45+	9
<b>Total</b>	<b>36</b>

Corporations also examined the use of employee time on EVPs (Table 3.15). Almost all (34) provided employees with paid time during their workday to participate in an EVP. 16 Corporations allowed employees to be seconded full-time or for a specific time period. There was a mix of answers about the freedom of employees to organise EVP activities during work time (yes for 25 corporations) and their own time (yes for 30 organisations).

**Table 3.15: Employee time and EVPs**

<b>Nature of additional employee entitlements &amp; activities</b> – Bold numbers relate to Questionnaire questions to assist in further analysis by readers.	<b>Yes</b>	<b>% (n=36)</b>
<b>8.</b> Our organisation provides employees with paid time-release during the workday to be involved in an EVP.	34	94
<b>9.</b> Employees can be seconded full-time for a specific period to a not-for-profit organisation.	16	44
<b>10.</b>		
a. Employees and team leaders are free to organise and carry out their own EVP activities during work time.	25	69
b. Employees and team leaders are free to organise and carry out their own EVP activities in their own time.	30	84

Further questions were asked about the encouragement provided by the corporation to employees in the use of their volunteer time. A mixed picture emerges, with employees being encouraged to participate during and outside work time (Table 3.16).

**Table 3.16: Encouragement for time use patterns of employees**

<b>Employee encouragement</b> – Bold numbers relate to Questionnaire questions to assist in further analysis by readers.	<b>Yes</b>	<b>% (n=36)</b>
<b>11.</b> Employees are encouraged to engage in a program once a year, during work time.	22	61
<b>12.</b> Employees are encouraged to engage in a program several times throughout the year, during work time.	21	58
<b>13.</b> Employees are encouraged to engage in volunteering activities outside of work time.	24	67

## ■ Management and leadership of EVPs

Corporate interviewees were asked to respond to a series of statements about their organisation's preferred relationships with NFPs, indicating whether they thought the statements were true or false (Table 3.17). Most preferred to work with more than one NFP (21), whereas only six preferred to establish a long-term partnership with one NFP and 22 liked a combination of short- and long-term projects with a number of NFPs.

**Table 3.17: Preferred relationships with NFPs**

<b>Preferences</b> – Bold numbers relate to Questionnaire questions to assist in further analysis by readers.	<b>Yes</b>	<b>% (n=36)</b>
<b>15</b>		
a. Prefer to establish long-term partnership with one NFP.	6	17
b. Prefer to establish a long-term partnership with more than one NFP.	21	58
c. Prefer to work with a number of NFPs on short-term projects.	6	17
d. Prefer a combination of short- and long-term partnerships with a number of NFPs.	22	61

Of the 36 corporations, only three had ever discontinued or suspended an EVP. Reasons for the three suspended programs were:

- The activity arranged was inappropriate for the corporation's employees.
- The NFP could no longer participate in the EVP on a national level.
- There was an OH&S risk for corporate employees at the NFP.

Brokers or intermediaries had been used at some time by 14 of the corporations to help set up or run their EVP and nine of these reported doing so regularly. Of the 23 organisations that had never used such assistance, one considered the fees too expensive, 15 corporations had sufficient internal resources to do the work themselves and a further seven specified other reasons for not using a broker.

**Table 3.18. Reasons for not using a broker**

Reasons	Total	% (n=36)
Could not find a suitable broker	0	
Broker fees too expensive	1	3
Had sufficient internal resources	15	42
Other	7	19
<b>Total</b>	<b>36</b>	

Corporate participants were asked to respond to a series of statements about leadership and management of EVPs, by describing them as 'true' or 'false'. Results are presented in Table 3.19. The results indicated that:

- The majority (31) of the 36 responding corporations had developed policies to guide their staff's involvement in EVPs with 15 having established staff training programs. Twenty corporations surveyed their staff to ascertain their past volunteering experience.
- Almost all 36 corporations monitored progress of their EVP, but fewer (20) set annual performance expectations and standards.
- Considerable resources supported EVPs in terms of coordination: 15 corporations have part-time EVP coordinators, 10 corporations have full-time EVP coordinators and 18 corporations have a team responsible for the EVP. 28 corporations have a dedicated EVP budget and 14 corporations provide 'placement donations' for their EVP.

**Table 3.19. Leadership and management of EVPs by corporations**

Leadership & Management Strategies – Bold numbers relate to Questionnaire questions to assist in further analysis by readers.	Yes	% (n=36)
<b>19.</b> Your organisation sets policies in place which guide the involvement of staff in our EVPs	33	97
<b>20.</b> a. Your organisation sets annual expectations for the performance to be achieved in your EVP.	34	94
b. Your organisation monitors the progress of your EVP.	36	100
<b>21.</b> a. Your organisation has conducted staff surveys to identify their volunteering involvement prior to implementing your EVP?	36	100
b. Your organisation has established orientation and training programs to prepare your staff to be effective volunteers.	18	50
<b>22.</b> a. There is a part-time coordinator who is responsible for managing your EVP.	15	42
b. There is a full-time coordinator who is responsible for managing your EVP.	28	
c. There is a team of people responsible for your EVP.	18	50
<b>23.</b> There is a dedicated budget to defray potential costs incurred by the volunteering project and/or organisation.	28	78
<b>24.</b> Your company makes a placement donation to the NFP when your staff volunteers on an EVP	14	39

## ■ Encouraging staff participation in EVPs

The corporations surveyed reported a range of methods to recognise staff involvement in EVPs including:

- Recognition in the corporates' internal email and newsletter communications (33)
- Giving staff in-house awards (13)
- Utilising public events and the media to recognise staff (15)

EVP activities were reflected in the promotion criteria of 14 organisations when recruiting for staff and 13 corporations considered their EVP to be part of their professional development program (Table 3.20).

**Table 3.20: Methods of recognising staff involvement in EVPs**

<b>Recognition and ongoing involvement of staff - Bold numbers relate to Questionnaire questions to assist in further analysis by readers.</b>	<b>Yes</b>	<b>% (n=36)</b>
<b>25.</b> Your organisation uses internal communication e.g. email, newsletters, bulletins to recognise the activities of your EVP.	33	92
<b>26.</b> Your organisation has in-house awards and certificates of recognition/achievement for our EVPs	13	36
<b>27.</b> Your organisation makes recognition at public events and local media of our EVP activities.	15	42
<b>28.</b> Your organisation uses EVP as part of a professional development program.	13	36
<b>29.</b> Your EVP activities are reflected in promotion or advancement criteria for staff and new recruits.	14	39
<b>30. a.</b> Your organisation uses other ways of recognising your employees' contributions in EVPs.	20	56

While 20 corporations specified other ways of recognising staff involvement in their EVP, they did not specify what they were.

Clearly identified EVP champions within the corporation were also used to encourage staff participation. Of the 36 corporations participating in the survey:

- 20 reported staff at all levels were internal EVP champions
- 3 indicated it was mainly executive management who played this role
- 4 indicated it was mainly general staff and team leaders who championed the EVP
- 9 respondents did not know who fulfilled this role within their corporation.

Corporations often tracked their staff's level of activity in the EVP, generally via internal performance measures and benchmarks (26) rather than using external performance measures (10).

EVPs were actively promoted within the corporations surveyed (Table 3.21). Of the 36 participating in the survey, the most common methods were email and intranet (34), and through internal newsletters (29). Generally employees are, however, not coerced into EVP activities via employment contracts, with the exception of two corporations who reported that the EVP was included as a key duty.

**Table 3.21: Methods of promoting EVPs within corporations**

<b>Promotional Methods - Bold numbers relate to Questionnaire questions to assist in further analysis by readers.</b>	<b>Yes</b>	<b>% (n=36)</b>
<b>34.</b> Your EVP is promoted through internal employee newsletters and bulletins.	29	80
<b>35.</b> Your EVP is promoted through email and/or intranet communications.	34	95
<b>36.</b> Your EVP is promoted through regular staff meetings.	24	67
<b>37.</b> Your EVP is promoted through recruitment materials for prospective employees.	22	61
<b>38.</b> Your EVP is included as a key duty in our employment contracts.	2	6
<b>39.</b> Your organisation has other ways of promoting your EVP in the organisation.	16	44

## ■ Evaluation of EVPs

Evaluation of EVPs was carried out 'annually' by 17 corporations and 'never' by 5 corporations. A further 5 reported that it was 'too early' to undertake an evaluation, and 9 gave other responses to the question.

Evaluations were carried out by an internal team of the corporation in 26 cases and by an external evaluation agency in 3 cases. In four cases the evaluation was carried out 'internally with an external evaluation agency'.

Corporations also often reported that their not-for-profit partners were formally involved in planning, implementing and evaluation of volunteering activities (Table 3.22). This was 'true' or 'mostly true' for 28 corporations.

## ■ Benefits of EVPs as reported by corporations

Corporations reported many benefits to them of being involved in EVPs (Table 3.22) including:

- EVPs improve employee morale (36).
- EVPs improve the image of corporations (33),
- EVPs assist corporations to implement their core mission (28).

The benefits least likely to be reported related to improving the organisation's financial performance ('true' or 'mostly true' in only ten cases).

**Table 3.22: Benefits of EVPs reported by corporations**

<b>Other Compensation - Bold numbers relate to Questionnaire questions to assist in further analysis by readers.</b>	<b>Yes</b>	<b>% (n=36)</b>
<b>44.</b> Your EVP improves relations with local and surrounding businesses.	19	53
<b>45.</b> Your EVP improves the social conditions of your local community.	22	61
<b>46.</b> Your EVP improves your organisation's image.	33	92
<b>47.</b> Your EVP improves employee morale.	12	100
<b>48.</b> Your EVP assists your organisation to implement its core mission.	28	78
<b>49.</b> Your EVP improves your organisation's financial performance.	10	28
<b>50.</b> Your not-for-profit partners are formally involved in pre-planning, implementing and evaluating volunteering activities.	28	78

## 4. Positive EVP outcomes and related factors

In this section the quantitative and qualitative data from the surveys was further explored. It is presented here in order to relate both NFP and Corporate organisations' views on the value of EVPs to the other factors and descriptors recorded in the survey (copies of the questionnaires are contained on the Toolkit CD). The data was analysed to develop the cross matched thematic summary described below in Table 4.1 Critical EVP Success Factors. Utilising this information, extensive review of existing research and The Centre's experience of corporate EVPs and the NFP sector, the resulting information was distilled into the twelve success factors listed here.

These EVP success factors, criteria and suggestions for small to medium NFPs wanting to fruitfully participate with a corporate EVP partner is presented in more detail on the accompanying Toolkit CD.

The CD contains, as identified in this research project, the need for pertinent resources such as a self assessment tool for NFPs to assess preparedness to start, manage or expand involvement with a corporate EVP partner. Also included are templates and instructions for writing manuals and policies related to a NFP's engagement with a corporate EVP.

The critical EVP success factors are outlined in Table 4.1.

**Table 4:1 Critical EVP Success Factors**

Success Factor	Criteria	Suggestions of how to achieve success
Experience	Minimum 2 years	Engage qualified entity to assist in implementing, managing and evaluating
Relationships and Partnerships	Establish and maintain long-term partnerships with more than one partner. Identify and clearly communicate expectations.	A combination of short- and long-term relationships will also work. Identify and utilise the strengths of the partner. Look for other kinds of support from the partner.
Broker/Intermediate	Confirm the broker has sufficient, appropriate experience and the fees are at market rates.	Confirm the intended partner is happy with the choice of broker.
Resources	Confirm adequate resources are available to set up, manage, train staff or expand an EVP.	Engage external intermediary and resources if necessary. Approach partner for set-up support.
Support	There is a direct connection between available resources and support required.	Ensure adequate resources and internal champions are available.
Promotion and Recognition	Publicise the EVP widely.	Recognise the partner's contribution.
Employee Involvement	Staff need to be trained to manage the EVP.	Create a culture of engagement and support for an EVP.
Leadership and Management	Ensure policies and procedures are documented and in place for both staff and volunteers.	Train staff in the policies development and procedures for the EVP.
Feedback	Provided feedback to the partners on a regular basis.	Implement a structured and time based communication procedure.
Evaluation	Monitor and evaluate the EVP on a regular basis.	Set expectation of the EVP at the beginning and check for achievement.
Contribution to local community	EVPs can contribute to status in the wider community.	Use media to highlight successful partnerships and outcomes.
Contribution to image, morale, mission	Look for partners that use the EVP to improve image and morale while it contributes to achieving organisational mission.	Ascertain in advance the objectives and philosophy of the partnering organisation to ensure a "fit" with internal expectations and external perceptions.

## 5. Success factors identified by participants

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Participants in the surveys were given the opportunity to indicate what factors made their EVP, or engagement with one, successful and also suggest how EVPs could be improved. Details of innovative projects were also sought. Interviewers were asked to record the participants' responses verbatim.

This section explores these responses and relates them to the previous analysis of quantitative data.

Similar to Section 3 above, NFP responses are addressed firstly and then followed by the corporations' responses.

The responses below are reported verbatim.

### Summary of NFP Responses to Section 5 – Open Questions

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Interviewees generally said that the commitment of volunteers was important. Their reliability contributed to the success of the EVP. Moreover, quantitative data revealed that a key point to success is the relationship between NFPs and corporations. Good communication, clarity of purpose and direction, understanding each other and good management were also significant themes. Mutual benefit was achieved via skills and experience exchange. Some stated good planning of a project is also a crucial factor.

Interviewees said retention of volunteers is a major challenge. Many interviewees stated having enough time to manage volunteers is also a challenge. This includes establishing relationships, training volunteers, organising events and meeting corporate needs. These additional tasks to an NFP's normal routine could become more time-consuming when the expectations from both sides are not the same.

Common recommendations for improvement were an ongoing ability to attract volunteers and increased frequency of EVP visits. One informant suggested a seminar could be conducted to discuss the mutual benefit of the EVP between NFPs and corporations. Interviewees suggested a dedicated person to manage an EVP is the best way to achieve an effective result.

Other common themes for improving their EVPs were more funding, more corporations becoming involved and training of employee volunteers. In addition, the assistance of intermediaries between NFP and corporations is necessary and more frequent meetings between NFPs and corporations would be valuable.

In conclusion, good relationships between NFPs and corporations are crucial to the success of an EVP. Regular communication can bring both sides together to achieve a better understanding of each other's goals, experience and skills. Time and resources are challenges that many small-to-medium NFPs currently face and they suggest that an intermediary might be able to help them overcome these drawbacks.

### Summary of Corporate Responses to Section 4 – Open Questions

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The open question section of the corporate questionnaire reveals what the respondents believe the success factors of their EVPs are, what the barriers are and how the corporations intend to overcome these issues.

EVP programs which have a 'bottom up' approach seem to be very successful as the employees decide themselves on how they want to be engaged in CSR. However, a long-term commitment by senior management and an holistic approach are also crucial for the success of EVPs – the employee volunteers need to feel they participate in decision making and that their recommendations will be championed and acted on by an internal decision maker.

Work/life balance is also considered to be very important and the EVP can contribute to this need if there is variety and flexibility in the program.

One barrier nominated in this section is the problem of a large number of branch offices across the state which could trigger last minute dropouts and make it difficult to organise programs. Better communication and reporting were suggested as a possible solution to this issue.

Input from NFPs and corporations is considered vital to establishing formal guidelines, which can structure the program effectively and increase the enthusiasm for participation. This also identifies the elements within NFPs and corporations which can help them join and work together to achieve common long-term goals.

## 6. Case Studies and Discussion

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### ■ Not-for-Profit Case Study 1

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The not-for-profit (NFP) organisation creates opportunities for people with a disability to actively enjoy time out doors and in the company of domestic animals. This is both therapeutic and recreational and assists in the development and enhancement of their client's abilities.

The NFP has been engaged with an EVP for more than five years. Delivery of its program is labour intensive, requiring at least two staff members or volunteers per client. Understandably its program uses a considerable number of volunteers.

Corporations offering Employee Volunteering Programs engage with the NFP as an addition to its existing, more permanent volunteers. The NFP has a dedicated staff member responsible for managing its EVP relationships. It promotes its EVP activities in its annual report, via the internet and its newsletters.

The NFP connects with a number of corporations providing EVPs and believes one of the major success factors of its EVP involvement is the extra human resources these programs provide, which in turn has a positive impact on the NFPs financial performance.

Corporate volunteers typically participate in outside manual labour, such as maintenance of the animal enclosures, tidying up after the animals and gardening.

The NFP presents corporate volunteers with the opportunity to provide feedback on their involvement with the NFP. These volunteers appreciate the opportunity to leave their desks and to be actively engaged in the open air. They are also attracted by a desire to work with animals.

When corporate volunteers do not possess the animal handling skills required to perform tasks, the NFP provides basic training in these techniques and appoints a staff member or experienced volunteer to supervise the corporate employee volunteer.

The NFP believes the enjoyment and sense of worthwhile achievement the corporate volunteers get from assisting the NFP strengthens the relationship between the corporations and the NFP.

As a consequence of strong relationships with corporate partners the NFP has also used them as a source of much needed funding.

The corporate volunteers, when not undertaking other tasks for the NFP, are also utilised in fundraising activities by this NFP organisation.

## ■ Not-for-Profit Case Study 2

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The medium-sized NFP utilises 600 volunteers to deliver its service, relying heavily on its permanent volunteers being available on a regular basis and uses its access to corporate EVPs to fill in gaps which occur from time to time.

A primary objective of involvement with Corporate Volunteering Programs, which has been functioning for more than two years, is to assist this not-for-profit achieve its mission.

The program provides an opportunity for people to participate in almost every aspect of the NFP's operation and its activities. It has also been endorsed by the NFP's Council and is managed by a full-time manager and two part-time assistants.

Employee volunteers typically participate in manual labour, such as cleaning and mopping, however other tasks such as assisting staff with repairs, operational activities and presentation of the NFP's assets makes them truly an essential part of the NFP. Each activity is clearly defined and documented by the NFP and given to the volunteers prior to commencing work.

The NFP's EVP coordinator sees this as a win/win situation. The employee volunteers themselves indicate that despite sometimes going home tired and dirty from a strenuous day in the outdoors they are very happy to be away from their desks contributing to something worthwhile.

One of the major challenges faced by the NFP is the expansion of corporate involvement. A strategy they employ to access greater corporate volunteer involvement is to run regular social activities, for example, outings, morning teas and other special events, creating a feeling of community involvement that serves to attract more volunteers.

## ■ Corporate Case Study 1

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The major success factors for this partnership are the EVP benefits to the community, it provides team building opportunities for its employees, it is well organised, it is driven from the top, is well promoted, is easy to participate in and demonstrates positive results.

The corporate has been running its EVP for four years and undertakes each EVP project for three months per year. Employees are given one paid day per year to volunteer. It requires its not-for-profit (NFP) partners to have a well structured program outlining the objectives for both corporations' employees and the NFP, provides short-term (one day) volunteering opportunities in order to make it effortless for employees to participate in the EVP on pre-selected dates.

To achieve the clarity and structure it needs, the corporation requires that the NFP complete a comprehensive form which outlines the NFP's:

- OH&S management
- Insurance policies and information
- Volunteer safety guidelines
- Detailed project schedule including:
  - Project size
  - Project scope
- Contact name and details of the project manager.

The corporate believes this requirement encourages the NFP to fully consider how the EVP will benefit to both the NFP and the corporation as well as ensure a structured program that is easy for the employee volunteers to participate in.

The corporate prefers to engage with more than one NFP in their EVP. They have found over time this is necessary to provide their employees with an adequate variety of projects to participate in. The corporate also wants to help as many NFP organisations as possible each year.

Access to the EVP by the corporation's employees has been automated by listing details on the corporate intranet about both short- and long-term projects being offered by a number of NFP partners. Currently

45% of their employees are participating in their EVPs.

The corporate does not require formal evaluation of the EVP projects being run by the NFP but does obtain feedback from its participating employees.

The keys to a successful EVP are developing long-term relationships with NFPs and creating structured programs which develop over time.

## ■ Corporate Case Study 2

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The corporation's EVP targets more than one social group in the areas of community services, health, environment and youth issues. It also has a preference for long-term partnerships and has been running its EVP for more than two years

The corporate has a rigorous, well-documented selection process for its core partners. Traditionally it researches the NFP sector in its area of interest, short-lists prospective partners and visits them to determine who they will sign an agreement with. Once selected the NFP partner is eligible for financial, multi disciplinary and volunteer support.

The corporate also engages its EVP with other non-core NFP partners. They are selected by a less rigorous procedure however, the corporate tries to ensure the best possible match between themselves and the NFP so that something worthwhile is achieved and all involved are happy and satisfied with the results.

Corporate employees are encouraged to participate in projects during work time as well as in activities outside of normal working times. These projects include fundraising, outdoor activities, offering their professional skills to the NFPs and mentoring. Sixteen percent of the corporation's staff participate in its EVP.

Policies, training of employees, professional development, recognition of the employees' involvement, promotion and evaluation of the EVP are important. The corporation's commitment to the EVP is demonstrated through their having a dedicated full-time internal resource to manage the EVP and their relationship with the NFPs. The EVP's activities improve employee morale and assists the organisation implement its core mission.

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# Appendix

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## Methodology

The Centre for Volunteering's Volunteer Referral Service advertised and conducted initial interviews to determine the volunteers' suitability on the basis of their ability to conduct telephone surveys to a script and then enter responses into Excel spreadsheets. Potential interviewers were then interviewed further by Jurgen Dohle, Project Officer, to confirm their appropriateness and were selected to assist the project. The interviewers who accepted this volunteer role were inducted into The Centre, given basic training in telephone interview techniques, introduced to the project and its aims, instructed on how to utilise the scripts and survey questions in relation to each interview.

Interviewers were instructed to stop trying to contact a particular interviewee if they did not get a reply or response after five attempts. It is estimated that the interview team may have made up to 12,500 telephone calls for this project, although no actual records were kept on the total number of calls.

In the latter stages of conducting the survey, The Centre for Volunteering became aware of research undertaken by Volunteering Australia and the Sensis Business Index regarding employee volunteering in small-to-medium enterprises. Sensis reported that 36% of their sample of SMEs "are already volunteering their support." In light of the significance of this new information, The Centre decided to test SMEs with only slight modification to the questionnaires and telephone scripts. Following discussion with Sensis on their methodology, it was obvious that they had to explain to their respondents the meaning of an EVP. That is, the SMEs did not have an understanding of formal EVPs or processes but did allow their employees paid time during normal business hours to engage in community service activities. Therefore under the definition of an EVP defined above, an informal EVP (lacking in documented procedures and processes), also qualifies as an Employee Volunteering Program. Additional questions were added to the interviewees' scripts to tease out informal EVPs and the survey continued until 28 September 2007.

## Dissemination of findings

Findings from this project will be made available on The Centre for Volunteering's website, announced or publicised through its e-newsletter The Voice of Volunteering, bulletins, community reports, peer-reviewed journal articles and conferences. The Centre has links with the 33 Volunteer Referral Centres in NSW that will be invited to promote training and resources through their networks. The successful development of EVPs will be promoted with examples of local case studies as part of the training conducted through the School of Volunteer Management and the national network of volunteering peak bodies.







