

Developing Employer- supported Volunteerism Policies



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For more information on employer-supported volunteerism, please visit www.volunteer.ca, Canada's site for information on volunteering.

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Canada

Table of Contents

Introduction.....	2
Understanding Policies, Guidelines and Procedures.....	4
The Policy Development Process.....	6
ESV Specific Policy Issues.....	10
Appendix.....	23

Introduction

In recent years, the business sector has recognized the importance of investing in the well-being and quality of life of the communities it serves. Companies are making this social investment through their relationships with local, national, and global stakeholders, and through business decision-making that is tied to ethical and legal compliance, respect for people, communities and the environment.

The management of these relationships is known as Corporate Social Responsibility, or CSR, and it has become an integral component of contemporary business models. Within corporations, the effects of decision-making based on CSR can be tracked through all aspects of operations. In adopting the principles of CSR, companies send a positive signal to employees, shareholders, investors, consumers, public authorities and non-governmental organisations. It is also clear that these companies are investing in their futures and they expect the endorsed voluntary activities to ultimately increase profitability.

One element of CSR that has gained momentum is employer-supported volunteerism (ESV). As a concept, ESV is defined as a company actively supporting and encouraging employees to take part in voluntary activity within their local community. Companies supporting this growing form of volunteerism have discovered a key entry point to direct community involvement.

There are a many ways that a company can build an ESV initiative, and different projects range in level of employer involvement, employee direction, and financial commitment. The starting point however, is the inclusion of the notion of ESV as part of the company's long-term vision and planning, deserving equal weight and treatment as other operational issues such as risk management or health and safety. Planning for operational issues is most often managed through clearly defined company policies.

A policy allows a company to tailor an issue to its specific needs, conditions and capacities. Policies assist a company to come to a concise interpretation of an issue and to develop directives within the company's context, which then can be easily disseminated throughout the workplace. There are a number of unique challenges posed by ESV initiatives, developing policies can provide a structure to help ensure an initiative's successful implementation.

In many cases ESV initiatives have grown organically within businesses. Often, this means that the practices associated with ESV are not formalized and there is no method in place to clearly demonstrate a company's commitment to community involvement. To facilitate the sometimes daunting task of policy development, Volunteer Canada, drawing on a wide range of corporate experience with ESV implementation, has produced this resource in an attempt to present a standardized approach to ESV policies in Canada.

Benefits of Employer-supported Volunteerism

- Improved relations with surrounding community
- Improved corporate public image
- Cost effective public relations
- Increased health of community
- Improved sense of self worth among employees
- Improved people skills among employees
- Increased employee job performance
- Improved retention of employees
- Reduced absenteeism
- Management initiatives that enhance performance
- Improved recruitment of new employees
- Improved communication among various departments of the company

“There is no greater personal reward than to give freely of one's time and effort towards a cause you truly believe in. Volunteers are an integral part of the success of so many worthy charitable endeavors, and serve as the tireless engines that help these organizations continue to run. Giving back to our communities through the spirit of volunteerism is among the greatest reward a person can achieve.”

**President and Chief Executive Officer R. Jeffrey Orr
Investors Group Inc.**

Understanding Policies, Guidelines and Procedures

Policies are present in companies of all sizes, steering everything from employee conduct to product treatment and customer relations. Policies reflect a governing principle of the company that mandates or narrows its actions. Their functions can be broken down into four main sections:

- Risk Management
- Values and Belief Statements
- Rules and Regulations
- Improvement Mechanisms

Policies set the frame of reference in which the company operates, taking into account everything that makes the organization unique as well as considering the environment in which it conducts its business. As those factors shift over time, policies will adapt to changing circumstances, creating a versatile structure for the company.

POLICY
Contains the essential principles of the company's philosophy of conduct for organization-wide application

GUIDELINE

Consistent with relevant policy principles; expands on the key standards of the policy area; provides managers with guidance on the application of policy principles; flexible and broad.

PROCEDURE

Consistent with relevant policy principles and relevant guidelines; more detailed information to facilitate the administrative process; approach format depends on the particular area (could include checklists, pro forma documents, forms, flow charts, procedures manual)

Once a policy has been adopted, guidelines need to be generated that support the management of policy application. These guidelines are often quite broad as they actually expand on the principles of the initial policy.

Policies and guidelines are augmented by procedures which clearly state in detail how the policy should be applied and executed. Procedures leave no doubt in questions of the administration of the policy, therefore making it easy for all levels of the organization to adhere to policy in a coherent fashion.

Corporate policies...

Serve as a guide when making important decisions

Provide the board and staff with an outline for managing sensitive or complex situations

Provide a standard series of methods on how to deal with recurring situations

Assist the company in its defense against certain types of legal actions

Build confidence and security

Encourage an atmosphere of fairness

May be required by law

The Policy Development Process

There comes a time in any business venture when an operations question must be answered repeatedly and everyone concerned wishes there was something in writing dealing with the particular challenge. This triggers a chain of action that could be described as policy development and it follows a particular sequence of steps. While many companies have tried and true methods for developing policy, others may not. The following 10-step process is designed to assist those who are looking for more clarity on the policy development process.

STEP ONE: DEFINE THE ISSUE

Policy development begins with recognizing the need for written policy. Often a company faces a decision that would be easier to make if a policy existed.

Investigate whether a relevant policy already exists within the company and if not, assess whether a policy is actually required
Define of the issue at hand

STEP TWO: GATHER NECESSARY INFORMATION ON THE ISSUE

To effectively present the issues that need to be turned into company policy, the policy sponsor, which could be an individual, committee or task force, requires a broad spectrum of knowledge on the issue and its possible application. Information to be gathered could include:

Sample policy language and analysis
Examples from other companies
Stakeholder input
Laws and regulations

STEP THREE: SOLICIT INPUT FROM SENIOR MANAGEMENT

Once a comprehensive outline is available the relevant member of senior management charged with recommending policy action should be approached to solicit feedback to be incorporated into the policy draft and to provide clarification on the policy development process.

Verify the company's internal process for development and approval of policies, guidelines and procedures

STEP FOUR: DISCUSS AND DEBATE

A discussion needs to be held that takes into account all the intelligence gathered in the previous steps. Answering the following questions should help with facilitating such debate:

- Is the content within the scope of the sponsors authority?
- Is it consistent with local, provincial, and federal law?
- Does it support the company's goals or objectives?
- Is it good personnel and business practice?
- Is it reasonable? (Are any requirements or prohibitions arbitrary, discriminatory or capricious?)
- Does it adequately cover the subject?
- Is it limited to one policy topic?
- Is it consistent with the company's existing policies?
- Can it be administered? Is it practical? How much will it cost?

STEP FIVE: DRAFT POLICY

Reaching consensus on policy content leads to the development of a first draft of the new policy. The first draft needs to be written in such a way that it:

- Is clear and succinct
- voids legalese and jargon
- s stated broadly with room for adjustment

STEP SIX: FEEDBACK AND REVISIONS

Once in writing, the policy draft is forwarded to the appropriate authorities within the company for a first reading, giving notice to everyone interested that the proper authorities within the company have a specific policy under consideration. Revisions of the policy are based on the information gained from the questions, comments and suggestions obtained after the first reading. The period between the first and second reading allows time for all concerned persons to ask questions, make comments, and offer suggestions for changes and improvements. A form to track the progress of the policy development can be a helpful guide, a sample template is included in the appendix of this guide.

- Seek feedback for first draft
- Revise policy
- Prepare final draft
- Forward for final approval

STEP SEVEN: ADOPT THE POLICY

The specific process for policy approval will vary from company to company. While this may not be the responsibility of the most senior leadership in the company, typically adopting new policy will require the approval of fairly senior staff. And, also typically, it would be only the policy statement itself which is presented for approval.

- Guide the policy through the approval process
- Notify Policy Coordinator of policy approval

STEP EIGHT: DISTRIBUTE POLICY WIDELY

Seeing the policies are distributed as widely as possible is one way to make sure the policy will be implemented.

- Distribute through newsletter, staff meeting
- Hold a formal orientation and training session to ensure that all who are affected by the policy clearly understand its implications
- Ensure that the policy coordinator is able to answer all questions pertaining to the policy
- Include coordinator's name and coordinates on the policy document

STEP NINE: OVERSEE POLICY IMPLEMENTATION

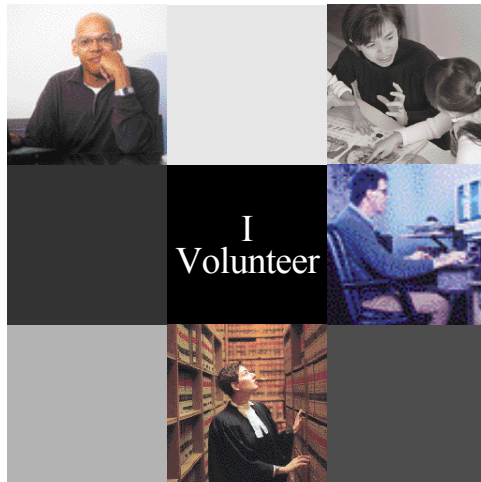
Overseeing policy implementation is a dynamic process that includes an evaluative component. Oversight is intended to make sure that the policy accomplishes its goal. Policy oversight can provide guidance on whether to continue or modify the policy and to determine future courses of action.

- Investigate any difficulties that arise in implementing the policy

STEP TEN: POLICY EVALUATION AND REVISION OR MODIFICATION

Policies should be reviewed on a regular basis as part of the company's standard operating principles and policy reviews. They can become outdated, unclear, or even contrary to the way in which the company is operating. When any of this occurs, the policy needs modification or elimination. The policy amendment process is the same as the policy adoption process. The company sets policy and senior management implements the policy within the guidelines set forth in company policy. In the absence of policy, a member of senior management must use their own judgment.

- If necessary, revise the policy



ESV Specific Policy Issues

The background research conducted for this guide indicates that, though ESV is becoming more a part of business practice, there is very little existing ESV policy in Canada. It is Volunteer Canada's hope that Canadian companies will begin to put practice into policy. Written policy will ensure and sustain the company's commitment to employer-supported volunteerism.

Volunteer Canada has identified the following key policy issues for ESV initiatives:

1. Your Company and Volunteerism
2. Internal Recruitment of Volunteers by Staff
3. Release Time
4. Volunteering and Corporate Financial Contributions
5. Financial Commitment to the ESV Program
6. ESV Initiatives for Retirees
7. Referral to Voluntary Sector Organizations
8. Volunteerism and Human Resource Development

1. YOUR COMPANY AND VOLUNTEERISM

Why is it important?

Your company's stance on community involvement and volunteerism will speak volumes to all of your stakeholders, both internally and externally. ESV initiatives are designed to add a new and positive dimension to the lives of employees who participate. As well, these initiatives offer the community a greater accessible pool of talent and an increased number of volunteer hours while simultaneously positioning your company as a good neighbor and an employer of choice. It is therefore necessary to define your company's view of volunteerism and how employees can become involved in the ESV initiative.

Issues to be considered:

Is the ESV initiative's position aligned with your company's mission?

What is the objective of the initiative? Is there a human resource element, public relations, or community need to be considered?

Have you asked your employees what they think?

Example: Carus Chemical Company, Carus Volunteerism Policy

It is the policy of Carus Chemical Company to promote volunteer efforts of our employees. The company supports local organizations both through financial contributions managed by the Community Involvement Committee and through encouragement of employees to participate and donate their time to local charities and organizations. To support this, Carus has designed a Volunteerism Policy, to allow employees up to eight hours/one day of paid time per year to volunteer during their normal working hours. We recognize that many scheduled volunteer projects may take place during an employee's work day. Additionally, certain programs, such as teaching Junior Achievement may require a larger time responsibility than eight hours. If you are partake in one of these programs, please be sure to seek approval from your supervisor for the extended time away from work prior to committing to the program.

GUIDELINES:

- The event must be a scheduled event that cannot be done outside your regular work hours (i.e. an organizational meeting held during your normal work hours).
- The organization must be one which would fall under the approved guidelines for company donation under the Community Involvement Committee (i.e. organization must be local, organization should not be religious in nature).

EXAMPLES OF VOLUNTEER TIME INCLUDE:

- I & M Canal Clean-up
Employees may contribute one hour during the workday to participate in the Canal Clean-up
- Jr. Achievement Teaching
- School Career Fair Presenter
- National Chemical Week Event
- Education to Careers Speaker's Bureau

To utilize volunteer time, an employee will request the paid time off at least one week in advance. This time off will be considered work time and should be noted on your timecard, where applicable, as "Volunteer Time." To request volunteer time, the following procedure applies:

PROCEDURE:

1. Employee fills out a Volunteer Request Form available in the Chairman's office or the Human Resource office, or by calling 224-6682 or 224-6610 to have one sent to you.

An example of the required form information is as follows:

Employee Name: John Smith Volunteer

Event/Date: Canal Clean-up-1/25/00

Request Date: 1/10/00 Volunteer Location: I&M Canal Lock 14, LaSalle

Expected time requirement for specific project: to 1 hour

Supervisor's Approval:

*It is the employee's responsibility to provide the necessary information in its entirety. The company will not call the appropriate organization to obtain this information (such as dates, times, programs available)

2. Obtain your supervisor's approval. The supervisor has the ultimate discretion of approval. No overtime can result to allow volunteerism. If your position cannot be easily covered and your absence will cause any business difficulty or safety violations, the request may not be granted.

3. Forward the approved request form to Lynn Solorio in the Chairman's Office. Lynn will send confirmation of your volunteer request via email (where available) or by telephone. If the volunteer request does not meet the above guidelines, Lynn will contact the employee and/or supervisor.

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2. INTERNAL RECRUITMENT OF VOLUNTEERS BY STAFF

Why is it important?

It is not uncommon for employees to ask their colleagues, staff or manager to volunteer in an activity that interests them. One concern is that the individual being asked to participate will feel that if they do not join the volunteer activity, they will be unfairly judged by their fellow employees or by their manager. To avoid this there might be a different process for "personal" recruitment as opposed to corporate initiatives, or, depending on your corporate culture, it may helpful to ensure that all ESV recruitment is managed centrally.

Issues to be considered:

How will volunteers be recruited? By their co-workers, managers, volunteer committee or a community relations department?

How will you communicate volunteer opportunities to employees? Via word of mouth, intranet, newsletters?

How do you ensure that staff understands what is a required or not required volunteer activity?

**Example: Solicitation Policy from a Financial Institution
(overall solicitation)**

The commitment is to provide a workplace where each person can perform his or her responsibilities without the interference of solicitation or distribution. Employees are not permitted to engage in solicitation of any kind at any time they are expected to be working or at any time the people being solicited are expected to be working.

Employees shall not distribute written materials of any kind at any time they are expected to be working or at any time in work areas. Furthermore, the posting of notices, signs, or written materials of any kind on the company's premises or on any company system, such as electronic mail or internet, is prohibited unless authorized by the company through senior business area management. The same applies to voice mail. Solicitation and distribution is permitted only when approved by senior management.

The company generally recognizes four major corporate charitable campaigns: (1) an annual golf tournament; (2) an annual United Way/Centraide Campaign; (3) local holiday giving programs; (add other approved activities as appropriate).

Senior business area management must authorize any solicitation or distribution undertaken in connection with these campaigns. Any solicitation or distribution beyond these limited campaigns must be approved in advance and in writing. Approval will be given only when the proposed solicitation or distribution benefits an approved charitable organization and the proposal is consistent with the company's overall community goals. Requests for approval for solicitation or distribution must be authorized in writing by a Senior Vice President or above.

DEFINITIONS

1. As used in this policy, "solicitation" is broadly defined and includes, by way of example only, suggesting, asking, or recommending that another person or customer contribute money to, support, or become a member of a particular organization, cause, or group or purchase goods or services of any kind.

2. “Distribution” also is broadly defined and includes, for example, passing out or sharing written materials, or products.

COMMENTS

Persons not employed by the company are not permitted to engage in any kind of solicitation or distribution of written materials or other items on company property or through company systems for any purpose at any time.

Use of company systems and equipment for non-business purposes, including unapproved solicitation or distribution, is a violation of corporate policy, and violators are subject to corrective action up to and including dismissal.

Communication of approved volunteer opportunities will be co-ordinated by designated individuals. Other volunteer requests are subject to the restrictions on solicitation and distribution described in this policy.

The Company generally prohibits solicitation of vendors, even for corporate charitable campaigns. Designated individuals will co-ordinate and communicate approved vendor solicitation for corporate campaigns. All other vendor solicitation requests must be approved in advance and in writing.

Violators of this policy will be subject to corrective action.

3. RELEASE TIME

Why is it important?

Some companies have found that providing release time for employees to volunteer in the community has helped with morale, motivation and availability. It is important to ensure that this policy is in harmony with existing human resource policies that regulate time away from work. Defining the parameters for volunteering on company time helps to avoid confusion or resentment with employee absence.

Issues to be considered:

Who is eligible to volunteer? Is it a benefit that is accessible to all employees or is it restricted? Is management approval required?

Will the company match volunteer time that the employee donates?

Will the company provide a specific amount of paid time off to volunteer? Is there a ceiling?

Are their 'black-out periods' for volunteer activity?

Should an employee's workload or deliverables be adjusted to accommodate voluntary activity?

Example: The Co-operators

Preamble

The Co-operators, in keeping with our core value of being a socially responsible organization supports staff who wish to participate in volunteer activities.

Guideline

It is recognized that some volunteer activities may take place during normal business hours and also after work. For the purpose of this guideline, both options are discussed.

Staff members must, however, avoid acquiring any business interest or participating in any other activity outside the Company, which would, or would appear to create an excessive demand upon their time and attention thus depriving the company of their best efforts on the job. To create a conflict of interest – that is, an obligation, interest or distraction that would interfere with the independent exercise of judgment in the Company’s best interests.

During Regular Work Hours

When staff members wish to participate in a volunteer opportunity during regular work hours, they must discuss with their manager or supervisor to determine how it may affect their regular work.

Staff members intending to take part in a volunteer activity during work hours, before making a commitment, confirm with their manager or supervisor and V.P. the conditions applicable to their participation.

After Regular Work Hours

A staff member participating in a volunteer activity after regular work hours should discuss with their manager or supervisor if the volunteer activity would interfere with their employment with The Co-operators.

Prior to accepting a commitment with a volunteer organization, staff member should refer to the Code of Ethics Policy.

4. VOLUNTEERING AND CORPORATE FINANCIAL CONTRIBUTIONS

Why is it important?

Companies are often pleased to support and recognize employees and retirees who volunteer their time with charitable organizations in their communities. Companies may recognize employee volunteer efforts by providing grants to organizations for which employees and retirees volunteer. Taking this approach can affect the ways that the company directs its philanthropic dollars.

Issues to be considered:

Will there be a prescribed formula for matching dollars to volunteer time (for example, 40 hours per year results in a donation of \$500)?

How do employees apply for the grant? What are the criteria?

Is there a cap on how many employees can designate dollars to be donated to one organization?

What is the budget associated with this grant program? How is it administered and who approves it?

Example: Manulife Financial Insurance, Partner in the Community, Guidelines

We are committed to giving back to organizations in our communities and to supporting our employees' involvement with these organizations.

Manulife proudly supports many community focused groups and programs. Each year employees give their time, energy and commitment to raise funds and offer volunteer support for a large number of community organizations.

Applications for support of programs should reflect the following criteria:

- be a post secondary education initiative that links to Manulife's business and helps students look forward to their careers,
- or
- concentrate on helping tomorrow's seniors (40+), and their communities, to make choices and take actions to ensure their sustained well-being,
- and
- positively affect change in behaviour or quality of life
- generate long-term, measurable benefits for the community
- support the World Health Organization's definition of health:

“Health is a state of complete physical, mental and social well-being and not merely the absence of disease and infirmity”

- provide an opportunity to engage Manulife employees, field associates, retirees and customers
- be innovative and strategic
- involve collaboration
- be action-oriented and community focused
- promote continuous learning
- be relevant to our strategic business interests

5. FINANCIAL COMMITMENT TO ESV PROGRAM

Why is it important?

There are always indirect, yet measurable costs associated with administering volunteer programs. Clarify the amount of financial support and determine which budget it will be taken from.

Issues to be considered:

Will the ESV initiative have staff support?

Will the company provide an annual budget to support the initiative?

Will the financial contribution include covering employee’s out of pocket expenses?

6. ESV INITIATIVES FOR RETIREES

Why is it important?

In adopting a ‘whole’ person approach to human resources, companies often extend ESV policy to include retirees. As employees retire, many of them are keen to stay connected to the company and to contribute to the community. Including retirees in your ESV program provides the community with additional talent and resources. It also provides the company with the opportunity of having goodwill ambassadors in the community.

Issues to be considered:

Are the same policies that are in place for your ESV program extended to retirees?

Will a separate ESV initiative be developed for retirees?

Will staff support be provided to support retiree volunteer work?

Does the ESV program include transition to retirement?

Example: Honeywell, Retiree Volunteer Program - HRVP

THE HRVP VISION

- Be an effective organization consisting of retirees and their spouses.
- Responsive to the needs of the community.
- Serve the needs of the volunteers which may include their physical, social and emotional needs.
- Make our communities a better place to live.

THE HRVP MISSION

- Recruit and place retirees and their spouses in volunteer positions.
- Generate and foster a sense of pride within each volunteer.
- Serve the needs of the community.
- Support the community affairs goals of the company.

HRVP keeps in touch with employee organizations such as, the Older Workers League (OWLS), Honeybellies, Minregs, Honeywell Consultants, camera club, and the engineers club. Individuals from these organizations may serve on the HRVP staff. They're good at reaching people.

HRVP is managed by Honeywell retirees for Honeywell retirees, and it seems to be remarkably successful at what it does. The staff is made up of people that spent many years as active employees at Honeywell in team building positions with considerable people skills. Its goal is to "re-engage the talents of the retirees," to fill the void that retirement sometimes brings, and to meet a community need in the process.

Honeywell finances the program and provides office space. The controllable funds are over \$40,000.00 per year. The funds cover the cost for computer data base equipment, membership dues, office supplies, mileage for "staff" and day managers, lunches, occasional trips and other minor expenses.

MATCHING THE RETIREE TO A VOLUNTEER OPPORTUNITY

The primary role of HRVP is to act as a broker of volunteers to the non-profit agencies. After the retiree has been placed in a volunteer position, HRVP plays only a monitoring and follow-up role.

Our focus is more on the people than the agencies. We like to find something meaningful for each person. We feel that if we can find a job that interests them, other things will fall into place. We know our people and we understand them. They're still involved with the company in some way. After you've spent thirty years with a company, you can't just wash it out of your life. This program helps you retain a tie to your working life.

7. REFERRAL TO VOLUNTARY SECTOR ORGANIZATIONS

Why is it important?

The ESV program furthers your company's mandate by supporting non-profit or charitable organizations with similar values. By identifying the organizations that could be selected as partners, companies minimize the risk of being partnered with an organization with an incompatible mission.

Issues to be considered:

Will you support, encourage and enable specific volunteer activities and not others (for example, sports and recreation and not after-school programs)?

Must organizations be registered charities?

Will you refer employees to religious and or political organizations?

Must an organization be associated with an employee?

Example: IBM Canada Ltd., IBM in the Community

IBM is recognized for successfully integrating employee volunteer programs into their core business operations around the world and for creating supportive environments that enable employees to volunteer in the communities in which they live and work. IBM employees in Canada interested in volunteering at schools or charitable organizations are provided with access to a new internal web site that lists all projects endorsed by IBM's Corporate Community Relations. Among the types of initiatives included on the web site are various national events (i.e.; Take Our Kids to Work Day), diversity programs (i.e.; Women in Technology), and e-mentoring.

8. VOLUNTEERISM AND HUMAN RESOURCE DEVELOPMENT

Why is it important?

A company's decision to support volunteerism does not need to be solely based on "doing the right thing". There are clear human resource benefits to having employees involved in the community. Employee recruitment and retention may be strengthened, skills may be refined and leadership qualities developed.

Issues to be considered:

Does the company see ESV initiatives as a tool for human resources development, or, as supporting employees' interests?

Can team-building activities be focused around volunteer activities?

Can an employee's skills be augmented by volunteering?

Will volunteering be an aspect considered on employee performance reviews?

Is the ESV program part of the orientation for new employees?

Example: Eli Lilly and Company

Employee Volunteerism Policy - Eli Lilly and Company

Eli Lilly and Company believes it is our responsibility as a good corporate citizen to help strengthen the communities in which we live and work. Consequently, we encourage our employees to become involved in their communities, lending their voluntary support to programs that enrich the quality of life and opportunities for all citizens. The following policy is a guideline for Lilly employees who serve as volunteers in community programs that are either of personal interest or are company-sponsored initiatives.

COMPANY-SPONSORED PROGRAMS

Company-sponsored programs are those programs whose goals are considered of strategic importance to the company and for which the company has provided funding. Human Resources and Community Relations will determine whether the activity is defined as company-sponsored. For a listing of company-sponsored programs, contact Community Relations for your site.

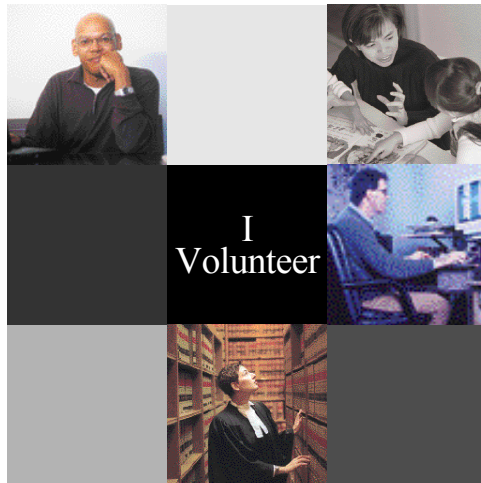
TIME AWAY FROM WORK

While it is the intention of this policy to provide all employees the opportunity to become involved in their community, approval from direct

supervision must be obtained when time away from work is involved. If the volunteer activity is company-sponsored but can only occur during core work hours, then time away from work will be considered time spent on company business. If the volunteer activity is not company-sponsored, flextime should be utilized. Prior to committing to volunteer activities requiring time away from work, it is the employee's responsibility to discuss with his or her supervision the impact such activity will have on the employee's work performance.

PERSONAL DEVELOPMENT

In addition, in consultation with employees involved in company-sponsored programs, Human Resources, management, and/or the employees' direct supervision will determine whether the volunteer activity should be viewed as a source for career development. If community service fills a company business need and is part of an employee's development plan, the activity will be considered an objective in the performance management process. Involvement in company-sponsored programs and initiatives is not mandatory.



Sample Form

Tracking Policy Development

Policy Issue _____

Policy Number _____

Who will be involved:

Date reviewed:

Policy Sponsor _____

Staff Department Head _____

Staff _____

Other _____

Board of Directors _____

CEO/President _____

Policy Committee _____

Legal council _____

Insurance Advisor _____

Others _____

Version	Who is Responsible	Due Date	Complete ()
First Draft			
Second Draft			
Third Draft			
Approved			
Review/Revision			

**Sample Policy Template
Referral to Volunteer Organizations**

It is important to ensure that your ESV program shares compatible values with the non-profit or charitable organizations that your company supports. By creating a list of acceptable partners you will minimize the risk that your ESV initiative becomes a public relations issue in the future.

Referral to Volunteer Organizations	
Date Approved:	Section: ESV
Revised Date:	Approval Authority:
Review Date:	Contact Person:

POLICY STATEMENT

Our company will support volunteer opportunities with organizations in our communities that meet our company/ community relations/ corporate citizenship guidelines and/or focus areas.

GUIDELINES

- At least one of our employees is involved as a volunteer with an organization seeking support to assure us that the organization manages its volunteer relationships well;
- Adequate employee capabilities exist to support the opportunity;
- Adequate resources exist to properly manage the relationship with the organization we are supporting and to properly promote the opportunity we are pursuing;
- There is a reasonable expectation that employees will support the opportunity;
- There is an opportunity to showcase the leadership of our organization and employees; and
- Our organization holds the discretion to terminate its involvement at any time for any reason including failure to meet the criteria listed above.

PROCEDURES

If an employee would like an organization to be considered for the ESV initiative, they must complete an application form with the Community Relations Department. The Community Relations Committee will review this application.

The Committee will examine whether there are any “knockout” factors - religious, cultural, sporting or political – that will disqualify the organization.

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_____. *Volunteer Connections: The benefits and challenges of employer-supported volunteerism.* Ottawa: Volunteer Canada, 2001.

Suncor Energy Inc. “A More Sustainable Approach to Volunteering at Suncor,” Calgary, November 2002.

WEBSITES

Business in the Community www.conferenceboard.ca

Carus Chemicals

http://www.caruschem.com/pdf/new_files/VolunteerismPolicy.pdf

Conference Board of Canada www.conferenceboard.ca

Eli Lilly and Company

<http://www.lilly.com/about/overview/policies/volunteer.html>

Honeywell <http://content.honeywell.com/HRVP/default.asp>

IMAGINE www.imagine.ca

Points of Light Foundation www.pointsoflight.org

Volunteer Calgary www.volunteercalgary.ab.ca

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