

NETWORK

A CORPORATE CITIZENSHIP RESOURCE PUBLISHED BY THE CONSULTING NETWORK

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What Is The Consulting Network?

The Consulting Network (TCN) is a national firm that draws on an experienced team of professionals to provide clients with results-driven services in corporate citizenship, community relations and contributions. In the course of our work over the last eight years, we have benchmarked more than 150 corporate citizenship programs and have distinguished the elements of effective practice. Our team also can address related corporate and employee planning, evaluation and communications activities.

TCN's range of services includes:

- ◆ Strategic planning.

- ◆ Program evaluation, benchmarking, development and integration.
- ◆ Grant evaluation.
- ◆ Organizational and staffing assessment.
- ◆ Community assessment.
- ◆ Management decentralization and support.
- ◆ Resource allocation and budgeting.
- ◆ Signature program development.
- ◆ Cause marketing.
- ◆ RFP program management.
- ◆ Employee involvement management.
- ◆ Workplace campaign assessment and management.

- ◆ Corporate volunteer and board leadership development.
- ◆ Staff training and development.
- ◆ Professional recruiting.
- ◆ Event management.

In addition, we provide supporting communication activities that enhance our clients' work, including:

- ◆ Public relations.
- ◆ Issues management.
- ◆ Communications audit.
- ◆ Publishing, including newsletters and annual reports.
- ◆ Speech and script writing.

Letter From the Editors

By John and Cindy Coy

We are delighted to share with you the inaugural edition of *Network*! After eight years in the consulting business, we have accumulated enough research, best-in-practice examples, presentation materials,

anecdotal information and contacts to launch this newsletter.

We want *Network* to be a resource for our current and former clients, colleagues and all of the people who

share information with us. It has been extremely rewarding to be part of this group's efforts to raise the standards of corporate citizenship, community relations, contributions and the components defined within

these functions and to see the successful results of these endeavors.

We aim to produce *Network* four times per year, exploring topics such as:

- ◆ Critical thinking and issues of debate from practitioners, academics and corporate officers.
- ◆ Best practices of effective programs through interviews with your colleagues.
- ◆ Interviews with colleagues who have addressed an unusual issue related to corporate citizenship.
- ◆ Interviews with chief executive officers or senior corporate officers about corporate citizenship.
- ◆ Reviews and references on business trends, publications and articles related to the corporate citizenship, community relations and contributions fields.
- ◆ Program highlights of innovative approaches to relevant issues.

Please feel free to copy and share articles from this newsletter, and please let us know your comments and ideas [through the fax-back form included in this issue](#). We want this publication to enhance all our efforts to make a difference in people's lives.

Meet Our Team

John F. Coy **Founder and President**

John has a deep base of knowledge and skills in the corporate citizenship, community relations and contributions arenas. His expertise ranges from strategic planning, organizational management and program development, integration and evaluation to cause marketing and signature program development.

John has worked with more than 50 clients during TCN's eight years. He also has been manager of public affairs for Deere & Company, president and chief operating officer of the John Deere Foundation and director of development for Augustana College in Rock Island, Ill.

As senior consultant to the Council on Foundations, John wrote *Integrating Corporate Community Involvement for Added Value* and *When Corporate Foundations Make Sense*. He also contributed to the Public Relations Society of America handbook *Practical Public Affairs in an Era of Change* and wrote *Managing Corporate Support: Responses to Challenging Times*, a comprehensive study on corporate contributions and community relations management, available through the Indiana University Center on Philanthropy.

Cynthia M. Coy **Co-owner and Managing Partner**

Cindy offers expertise in community relations, program development, benchmarking research, grant program management and project and event management.

Her 25 years in the health and human-service field include 10 years managing public relations, public affairs and special initiative programs for a regional health care system in Illinois and for United Way of America in Alexandria, Va.

In addition, her experience in health care and volunteer development and her involvement in national public awareness campaigns, such as Time To Care and Primetime to End Hunger, have enabled her to work with a broad network of public, private and nonprofit sector leaders including federal officials, business executives and sports and entertainment figures.

Stephen K. Greenhalgh

Steve's focus in charitable workplace giving campaigns comes from his years of experience in planning and implementing development and marketing campaigns for national

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nonprofit groups.

Steve provides workplace campaign assessment, benchmarking, strategy development, marketing, communications and program implementation. While with TCN, Steve has benchmarked more than 50 employee workplace giving campaigns. He recently provided workplace campaign assessment and recommendations to Sears, Roebuck and Co., The Prudential, Maytag Corporation, Allstate and Freddie Mac. He also offers counsel to the Council of Federations, a coalition representing more than 500 international and local charities, and assistance to United Way of America.

For 11 years, Steve worked in the United Way system, most recently as United Way of America's vice president of corporate relations, where he was a liaison with more than 400 national corporations and their employee solicitation programs. In this capacity, he designed a fund-raising and communications audit to assess employee workplace giving programs and a national program to recognize corporations for their philanthropic support.

Lori A. Vacek

Lori brings program development,

communication, evaluation and management skills to clients in the areas of grantmaking and corporate community involvement. She also is skilled in community and organizational assessment, benchmarking research, conference planning and tool development for grantmaking and employee involvement programs.

As director of corporate services for the Council on Foundations in Washington, D.C., Lori helped provide services to more than 200 corporate giving and community support managers, including strategic planning guides and public relations and communication resources. Recent consulting projects for two national clients include benchmarking, identifying potential community partners, and developing tools to institute a decentralized corporate giving and volunteer program. She also wrote a conference report on corporate citizenship practices in Asia Pacific markets.

Lori has been a program officer for the Wells Fargo Bank Foundation in San Francisco, a senior consultant for Price Waterhouse and a budget analyst for the California Department of Finance.

Anthony De Cristofaro

Tony brings public relations and communications skills to the TCN portfolio by offering clients an

array of services, including public relations, communications counseling, media interview preparation and presentation skills coaching. He has worked with and continues to provide help to Fortune 500 companies, entertainment companies, health care organizations and businesses in the telecommunications, pharmaceutical, transportation and other industries.

Most recently, Tony was vice president of media for Hill and Knowlton, Washington, D.C. He also has worked with various community-based and national nonprofit organizations, including his tenure as vice president, corporate communications, for United Way of America in Alexandria, Va.

Catherine C. Jenkins

Cathy offers communications skills, especially in researching and writing annual reports, newsletters, brochure copy, scripts and speeches. Her investigative skills have been helpful to clients during research, community assessment and stakeholder interview projects, and she has experience in events management.

After working as a daily newspaper reporter, Cathy held various positions in the United Way system, including director of

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communications services for United Way of America in Alexandria, Va.

Bernard J. Nolan

Bernie offers program management, development and evaluation services to TCN clients. His 34 years with Procter & Gamble Company include 19 as vice president of the Procter & Gamble Fund. In this capacity, he evaluated and worked with a wide variety of national and local organizations dealing with major

social, educational and community issues.

Bernie has considerable experience in leadership positions with a number of national groups, including United Way of America, the United Negro College Fund, National Alliance of Business and The Conference Board. He also was instrumental in the research phase of *Managing Corporate Support: Responses to Challenging Times*, a comprehensive study on corporate contributions and community relations management.

Stanley C. Wright

Stan's skills in strategic planning, program and organizational assessment and quality management were developed during his 33 years with the Eastman Kodak Company, eight as the company's director of corporate contributions.

His strategic planning expertise includes his work in developing a model that strategically aligns contributions and corporate support with a company's operating objectives. Stan also has experience in pre-college corporate support programs and attracting and retaining minorities

The Evolution In Workplace Giving: COMPANIES AND EMPLOYEES FORGE PARTNERSHIPS FOR THEIR COMMUNITIES

Team building within companies is one of the most dramatic changes happening in the workplace giving arena," said Steve Greenhalgh, who specializes in planning, implementing and evaluating workplace campaigns for The Consulting Network (TCN) clients.

"Companies are recognizing that employees are an important part of the workplace giving team. They no longer are telling employees, 'We value you,' and continuing to run a top-down campaign."

"Companies are assessing what makes a good campaign,"

Greenhalgh said. "With decreasing employee participation, they're saying, 'What are we doing wrong? What are we doing right?' They are looking at the cost to run a campaign and how they can make it more efficient. They are looking for a way to increase employee involvement and ownership as volunteers and contributors. They are trying to give employees choices, with less pressure. And they want a campaign that looks and feels fresh. More and more, they are recognizing that teamwork is the key in getting to the heart of all these concerns."

THE MOTIVATION TO CHANGE

In a 1995 employee workplace campaign benchmarking report, TCN cited four major factors motivating corporations to examine their existing workplace campaigns:

- ◆ On the whole, workplace campaigns are not attracting new donors, are not increasing giving from employees and are not increasing the percentage of employees who participate.
- ◆ Companies are focusing on cost efficiency and quality performance in administering their employee charitable

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giving campaigns. The economic belt tightening that began in the early 1990s is forcing companies to ensure that their charitable dollars have the most impact possible and are being used in ways that are important to their business and their employees.

- ◆ Employees want more freedom to designate and control their charitable activities. "We have telephone companies, television stations, benefits packages ... lots of choices. Employees want the same kind of options and control regarding how their charitable dollars are going to be spent," said Greenhalgh.
- ◆ Donors are becoming even more skeptical of many charities' intentions and management styles.

Greenhalgh said that in addition to these factors, other workplace giving trends have become clear:

- ◆ Corporations are becoming more strategic about their role in the community.
- ◆ Corporations want to expand and enhance employee involvement.
- ◆ Companies are taking ownership of their programs.
- ◆ Workplace campaigns are part of a larger employee involvement process.

The employee involvement process is natural since companies and employees typically value what they can do to improve their

communities. American workers contribute more than \$2 billion to charity each year, mainly through payroll deduction.

Team building within companies is one of the most dramatic changes happening in the workplace giving arena.

Steve Greenhalgh,
The Consulting Network

Jan Cooper, director of foundation programs for Maytag, said being a good corporate citizen is important. "We want to improve the vitality of our communities by addressing issues that are important to our employees, to our company and to our customers." In addition, the company's philanthropic activities support Maytag's business goals and aim to make their communities attractive to employees, Cooper said. "The workplace campaign gives employees a chance to participate in the process, to make a difference. It also fosters teamwork. Plus, in the long run, I hope we feel good about ourselves and about our company."

EVALUATION IS THE FIRST STEP

A TCN model evaluates and identifies opportunities to

strengthen employee workplace campaigns so they are responsive to corporate goals and objectives, supportive of employee interests and address the important issues in the communities where the company has a presence.

The process includes:

- ◆ Defining the objectives and desired outcomes of the workplace campaign.
- ◆ Surveying senior managers, operations managers and employees.
- ◆ Evaluating the current internal campaign practices and trends.
- ◆ Documenting effective workplace campaign strategies in other corporations.
- ◆ Identifying opportunities to revitalize workplace giving programs.
- ◆ Evaluating internal campaign support systems to determine capacity to sustain the campaign.
- ◆ Developing a set of recommendations to increase the effectiveness of the workplace giving campaign.

THE KEYS TO SUCCESS

Companies are finding out that there is no one answer that suits all situations. However, there are five critical success factors that appear across the board in companies that have increased employee participation and per capita giving:

- ◆ Leadership Support Ñ Examples include a high chief professional officer profile in campaign materials, commitment to and endorsement of the value of employee involvement, visible participation in campaign activities, and a corporate culture that supports the campaign and middle managers in allowing time for campaign activities.

ÒThe workplace campaign gives employees a chance to participate in the process, to make a difference. It also fosters teamwork. Plus, in the long run, I hope we feel good about ourselves and about our company.Ó

Ñ Jan Cooper, Maytag

- ◆ Employee Involvement and Ownership Ñ Examples include an employee committee that evaluates and recommends campaign design, employee campaign management, an evaluation of employee perceptions and interests and employee involvement in campaign activities.

At Maytag, an employee survey showed that even

AT SEARS: CHANGES FOR SUCCESS

ÒSears has been undergoing one of the biggest remakes in corporate America, and their associates are key to this change,Ó said Steve Greenhalgh of TCN.

With 2,300 department stores and off-the-mall locations across the country, Sears is one of AmericaÕs most well-known retailers. Its long tradition of community support also is well-documented, with more than 2,000 employee associates and retirees active in volunteer programs and more than \$15 million contributed for its community relations programs. Associates also give more than \$6 million to United Ways nationwide.

But, the traditional workplace campaign at Sears was losing steam. An evaluation revealed that employees viewed their campaign as a top-down process with limited choices and a perception of pressure to give. Sears was suffering a decline in associate campaign participation and flat campaign results.

ÒThe new CEO, Arthur Martinez, wanted to transform the company,Ó Greenhalgh said. ÒSo, as part of that, Sears got its associates involved in planning and running their campaign. In the first year, they saw a 12 percent increase in giving, a 6 percent increase in associate participation, a high level of satisfaction about the campaign among associates and the ability

to give money to more nonprofit groups than ever before.Ó

The Sears transformation included:

- ◆ Developing key communication messages and strategies.
- ◆ Redesigning campaign materials to have a fresh look, a new logo and a new theme: You Can Make a Difference.
- ◆ Encouraging associates to volunteer as campaign workers.
- ◆ Providing ongoing communication with campaign volunteers.
- ◆ Training campaign workers in effective fund-raising practices.
- ◆ Providing associates with educational materials about community needs.
- ◆ Listing nonprofit groups, including United Way, in campaign materials. In a survey, 70 percent of the lead campaign volunteers at Sears said they liked choosing from a list of national and local health, human-service and environmental agencies. In the 1996 workplace campaign, the list included two initiatives: Coats for Kids, a Sears-sponsored program and GildaÕs Club, a national partnership. Of the associates who gave to the campaign in the six You Can Make a Difference pilot locations, 45 percent designated their contributions, with 91 percent of the designators choosing an agency from the list provided.

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simple changes can make an enormous difference. With a few campaign alterations and an increase in Maytag's work force, total giving there increased by 36.6 percent.

Cooper, who also was the 1996 campaign chair for the local United Way, said fund raising had become stale, not to mention a bit of a struggle. Maytag found that moving their internal campaign from October to September conflicted less with plant workers' schedules and availability. Feedback was positive; employees felt less pressure and were more available to volunteer. Extending the campaign from two days to two weeks also helped, Cooper said.

Another simple but effective tool was Maytag's leadership campaign, which preceded the general solicitation. Cooper said that for 20 years, people who gave at least \$100 participated in what was called an advance campaign. Last year, the local United Way established a Pillars Club for the August leadership campaign and asked people to give a minimum of \$200. Maytag followed suit, and the leadership campaign showed a 37 percent increase in participation and a 39 percent increase in funds raised over the previous advance campaign.

Other employee-driven ideas included having campaign

co-chairs from the plant and office buildings and a drawing for a new washer and dryer. Another drawing incentive to increase per capita gifts allowed the winners to present \$100 and \$200 checks to their favorite United Way supported agencies during a post-campaign recognition luncheon.

The employee involvement process is natural since companies and employees typically value what they can do to improve their communities.

- ◆ Focus on Communication and Education – Examples include continued employee exposure to recipients of charitable services, use of multiple communication channels and use of contests, incentives, volunteer opportunities and agency tours. Personalized communication strategies work best.
- ◆ Campaign that Promotes Choice – Companies usually expand their range of giving options to be more responsive to employee interests and to demonstrate the value they place on employee involvement. While choice alone does not necessarily raise more money, choice may help raise

more money when added to a campaign that incorporates the success factors of leadership, employee involvement and education.

When Prudential wanted to revitalize its 1996 workplace campaign, which had suffered a drop in giving with only half of its employees participating, company officials asked employees what they wanted. The resulting plan retained traditional ties with United Way and responded to employee desire to select additional charities to participate.

Prudential's program, renamed the Community Giving Campaign, allows employee committees in each of its regional centers to select four federations in addition to United Way. So, while the campaign partners may vary from region to region, Prudential employees are choosing the charities most important to them. Employees also may direct their contribution to any other 501(c)(3) organization, excluding arts, education and religious groups.

- ◆ Use of Technology – Applying technology helps companies communicate with employees (e-mail, interactive video, telephone response lines), train local campaign coordinators (teleconferencing) and manage and implement the workplace campaign (on-line pledging). However, technology cannot be a substitute for personal

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contact. For example, when Allstate moved to a passive telephone response campaign in 1993, giving dropped from \$3.1 million to \$1.3 million in 1995. Employee involvement dropped from 50 percent in 1993 to 13 percent in 1995. In 1996, giving decreased again, even after Allstate reached employee agreement on distributing dollars raised to United Way and other organizations, such as the American Heart Association, the American Cancer Society, Make a Wish, Second Harvest and Special Olympics. The company now is re-evaluating the telephone response system.

Greenhalgh also stressed that with the personal touch, companies are putting the fun back into workplace campaigns. For example, Bank of America sold "Casual Day for United Way" stickers that raised \$1 million and entitled employees to dress down for one day. At Maytag, vice presidents greeted employees at the door on their campaign kick-off day with cookies and fact sheets about the campaign. "Events are motivators," Greenhalgh said. "We're seeing all kinds and many more of them, including baby picture contests, raffles, carnivals and even tricycle races in the company lobby."

Freddie Mac added a new twist to the traditional agency fair by asking employees to nominate or host their favorite charities in the building's atrium. "Employees extended the invitations, made sure their charities had everything they needed and hosted them on the day of the fair," Greenhalgh said. "Their first year, Freddie Mac had 30 charities participate, with 25 of them hosted by employees."

To receive a checklist of the characteristics of an effective workplace campaign, please contact TCN on the form below.

WE WANT TO HEAR FROM YOU!

We want to stay in touch with our readers so **Network** can be an increasingly effective tool.

Name: _____

Please let us know your thoughts on the following:

¥ What suggestions do you have for future newsletter topics?

¥ Are you willing to be a resource? _____ yes _____ no

¥ If so, for what topics or issues?

¥ How would you prefer to be first contacted?

_____ by telephone: _____ (number)

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¥ Would you like to remain on our mailing list? _____ yes _____ no

¥ Would you like a checklist of the characteristics of an effective workplace campaign? _____ yes _____ no

¥ Is there a different or corrected address we should use? If so, the new address should be:

Feel free to send this form to us by fax at (703) 641-0534 or by e-mail at tcncoy@msn.com. **THANK YOU!**