Expanding the Universe of Volunteers: Family, Friends, Customers, Community Members

A more inclusive approach to volunteering offers companies an opportunity to build new, expanding communities that reflect a shared commitment to mutual respect, problem-solving and sustainable growth.
Major Takeaways

- Companies increasingly are inviting others to join their volunteering – families of employees, retirees, business customers, retail consumers, and the public at large. They are demonstrating that it is possible to do so successfully.

- Engaging others outside the active-employee base broadens the volunteer workforce, builds community, increases the scope and impact of the work and benefits the company by actively demonstrating its values and social responsibility commitments.

- This expansion beyond employees creates new opportunities and new challenges for those managing company programs as they build new partnerships, learn to engage with new audiences and think about their work in new ways.
Introduction

While the notion of leverage is a popular business concept, most companies do not apply it significantly to their volunteer programs, missing the opportunity to extend them beyond their own employees. That means less impact in the community, fewer people exposed to the value of volunteering, fewer potential future volunteers and thus less overall value to the company.

This chapter explores the approaches of companies who have moved “beyond employees” to invite participation by families of employees, retirees, customers, business partners and, even, the community as a whole.

Forty years ago, the cutting edge of corporate volunteering focused on programs designed to engage retirees. Thirty years ago, the concept of family volunteering was just emerging. Twenty years ago, the notion of a company purposefully inviting volunteer participation by retail consumers, business customers, suppliers and vendors, let alone the entire community, was barely considered.

But the nature of the workforce has continually changed. Today, the cohort of career employees who remain tied to their companies after retiring with 30 or 40 years of service is shrinking. Workers with families are seeking more from their employers than just a job. Consumers have demonstrated their growing preference for companies with a demonstrated commitment to sustainability and social responsibility. Companies themselves are recognizing the value of building a shared social commitment into their business-to-business relationships.

All these changes are playing out in the practice of corporate volunteering. It is an exciting and challenging new frontier for those responsible for their company’s volunteering. They are called upon to build new, mutually beneficial partnerships with their business customers and suppliers, to develop the systems required to effectively engage those from outside the company in their activities, to create new messaging for new audiences and to document the results and benefits to their company. They
are front-line actors in a significant cultural shift in the ways companies relate to external audiences.

The most obvious challenge for these managers is a potentially significant increase in workload. This may be addressed through increased allocation of human resources as programs expand to include new participant groups. It also may mean increasing the engagement of internal volunteers to take on project management tasks, potentially providing released time from normal work responsibilities to allow for that. All involved will need to learn new approaches to recruiting, motivating and managing people who are not paid by the company and who are engaging as volunteers because they see the value of the opportunity to do so.

For companies, the critical challenge is to develop an appropriate level of comfort with the involvement of non-employees in company-sponsored and managed activities. For some companies that will mean the need to examine issues related to liability, insurance coverage and risk assessment. This offers a clear opportunity for companies to learn from one another by sharing experiences and resources that address these issues.

The experience of companies who have led the way, in major and minor ways, leads to the conclusion that including non-employees – families, retirees, business customers, consumers, and other companies – broadens the volunteer workforce, builds community, increases value and benefits the host company. Rita Monteiro at EDP in Portugal summarized it quite nicely: “Being open to receive friends, families, partners and clients in some activities enriches our program and multiplies the impact of each activity. We have entire families volunteering through the company. For example, one mother volunteered in schools with the Junior Achievement program, which challenged her children and, in the end, all the family was participating. It challenges younger generations and it reinforces our sense of community.”

This chapter systematically reviews examples identified during the current research that illuminate how companies are responding to these new opportunities to expand the universe of volunteers participating in their programs. It starts with examples of those who have launched broad opportunities for public participation and then examines involvement of families of employees, retirees and business customers, retail consumers, clients and partners.

"As business leaders, we can collaborate with our customers, employees, partners, communities, governments and institutions to create cultures of trust that put the wellbeing of our people and planet first."

Marc Benioff, Founder, Chairman and CEO of Salesforce
Inviting the Community to Participate

Grupo Modelo, the Mexico-based subsidiary of Anheuser-Busch InBev (AB InBev) since 2013, has taken a unique approach to making volunteering inclusive. In 2014, building on its existing employee volunteer program, the company created a digital platform to directly connect NGOs with potential volunteers, opening the opportunity to volunteer to the general public as well as to their own employees.

The first event on the platform celebrated International Volunteer Day in December 2014. An invitation through national media for volunteers resulted in 55,000 registrations and 27,000 volunteers participating in more than 70 activities on the same day at the same time throughout the country – “a resounding success!”

The platform allows employees and the community in general to connect directly with organizations to do their volunteer work. Through the platform, NGOs can promote and manage their own volunteer activities and don’t need the company to act as an intermediary.

Grupo Modelo has offices or agencies throughout Mexico, for both beer production and distribution, giving the company a unique local presence nationwide. As a result, they have been able to organize activities relevant to localities throughout Mexico.

Now, Grupo Modelo’s sister companies in Colombia, Ecuador and Peru have co-developed a platform similar to the one used in Mexico to allow the members of the community and also employees of other companies to register and participate in volunteer projects. In each country, the company has a database of NGOs. In Mexico, Grupo Modelo has more than 600 registered NGOs, all to facilitate greater volunteer engagement.

All participating NGOs must be legally registered in the appropriate government offices. As needed, the company helps with training and professionalization to manage activities with volunteers.

By opening its corporate program to everyone, Grupo Modelo stopped seeing the limits of the company and understood that its contribution to volunteering reaches into the community. Unifying actions across the region reinforces the culture they are promoting, making it easier to understand and to share internally and externally.
A member of the Modelo team spoke directly to the importance of an open program:

“What is "muy padre" (very cool) about these programs is that each employee of the company can choose what he or she want to do. For example, on Environment Day, since we all work for a cause, everyone can choose with their family if they want to clean a beach or go to paint a school. Each person is really different.

The moment when you can share these types of activities with your family.... everything changes. The pride that we were talking about, belonging to a company that supports this type of thing, is exponentially enhanced. It is an impressive feeling of pride of a lifetime, because I am a volunteer at heart.

Ping An Insurance, based in Shenzhen, China, is one of the largest financial services companies in the world. As it has grown both domestically and internationally, it has maintained a strong corporate commitment to the concept of “remain true to our original aspiration and give back to the society.” Ping An has embraced the principles of ESG (Environmental, Social, and Corporate Governance). After years of practice and development, encompassing poverty alleviation in rural and urban areas as well as other actions taken in the public interest, both online and offline, the company has normalized its volunteer service and extended its programs to employees’ families, suppliers, customers and the public.

For example, Ping An agents often take customers to participate in volunteer activities, strengthening their connection and interaction by jointly practicing a dedication to service. The most representative teams are the Shenzhen Tianzhong Benevolence and Beijing Julong teams which are made up of agents who then engage colleagues, family members and customers to volunteer together. The core team of more than 100 agents radiates to a volunteer team of people throughout the company and beyond.

For example, the Julong team has been committed to public service for 12 years and has worked in partnership with the Xinhua Education Foundation in Zhejiang Province on the Pearl Retrieval Program. The foundation cooperates with local high schools to establish “Pearl classes” to support high school students who are at risk of leaving school due to family poverty. The Ping An team has funded over 500 Pearl students. The team and its clients
have supported eight Pearl classes in Gansu, Qinghai, Yunnan and other places. In 2014, the team raised some 580,000 donations for young girls with leukemia.

The Tianzhong Benevolence Family team has been committed to public service for 23 years. Over 1,200 team members, family members and customers have joined together to support the Ping An Benevolence Hope Primary School in Guangxi.

Since April 2018, Ping An’s volunteering has been supported by the San Cun Hai charitable platform. It provided Hope School with a sustainable and reliable education resource platform to realize its distance-learning assistance tools. The volunteer branch can publish activities and needs on the platform, and employee volunteers can see various online and offline opportunities. Through this platform, all kinds of volunteer service projects can be implemented directly to help people in need.

Ping An also encourages employees and associated agents of the company to participate in public service, providing a one-stop support platform for volunteers. The firm aims to create an intelligent mutual aid platform of “I am for everyone, everyone is for me,” encouraging Ping An internal employees, customers and the public to participate in volunteer activities, and helping extend the company’s public service work.

Ping An people can apply online for registration as a volunteer through the San Cun Hui app. Entering the volunteer area, they can receive and complete various online and offline public welfare tasks. At present, the platform has more than 2.5 million users, and has launched more than 470 public welfare volunteer service activities.

In 2019, the Ping An upgraded its San Cun Hui app to be the “public welfare intelligent mutual aid open platform” San Cun Hui Time Bank. Volunteers now receive and complete public welfare tasks on the platform. Online and offline public welfare activities can earn corresponding public welfare “time currency.” In the future, when volunteers need help, they will be able to exchange “time currency” with other volunteers.
Family volunteering emerged as an identifiable, discreet form of involvement in the United States in the 1990s through research, development and promotion by the Points of Light Foundation. It was unique because it is, by definition, multi-generational and it engaged children in ways that at that time were not common. Today, it is generally recognized as a way to strengthen families and to transmit values of helping and social responsibility across generations. It is one of the most popular ways companies can expand participation in their volunteer programs. It also is recognized as a powerful way to build employee pride in, and loyalty to, the company.

**Telefónica Foundation**, headquartered in Madrid, Spain, involves children of employees on International Volunteer Day for large group actions such as those related to environmental protection. They do this because, according to Carlos Palacios, Global Volunteer Program Manager at Telefónica Foundation, they understand that “volunteering, in a broad sense, is a way of educating the next generation in values. We believe that our volunteers have a moral responsibility, and we have an ethical responsibility, as a company and as a foundation, to transfer good practices, good human customs and good human practices to the generations that will follow us.”

**Vecinos en Acción** (Neighbors in Action) is the volunteer program of **Banco General** in Panama, which annually involves more than 3,000 employees and members of their families. **Vecinos en Acción Juvenil**, begun in 2012, is specifically designed for adolescents, children of employees who are between 12 and 21 years old.

In 2019, some 230 adolescent children of employees were registered in six of the 10 provinces of the Republic of Panama. Among the most popular activities: birthday celebrations for children living in the homes of Nutre Hogar, a non-profit organization that fights against child malnutrition in communities living in extreme poverty. Other popular activities included home visits for older adults, many of whom have been abandoned by their families; beach cleaning days; accompanying athletes from the Panama Special Olympics Foundation; and school tutoring for younger children who are beneficiaries of various non-profit organizations linked to the Fundación Sus Buenos Vecinos (Your Good Neighbors Foundation).

The bank is very proud of its youth program. Adolescence is often considered to be a difficult stage for young people and their families. Volunteering provides an important life experience and contributes to forming a culture of solidarity from an early age for the benefit of the society.

The volunteer program of **Grupo Terra**, a Honduran-based energy and construction company operating throughout Central America, is guided by its mission statement: “Promote solidarity through volunteering, generating spaces of participation for employees and their families, in actions for
The company believes that the participation of employees’ children offers an important way to teach values. It also increases employee participation and impact, strengthens the involved families and links them with the company. Providing opportunities for families to participate encourages older employees to volunteer with their children.

The realities and needs are different across the countries where the company operates. Education, culture and poverty influence the design of each program. For example, one of their companies in Guatemala is located in an indigenous community, so the projects and activities are designed to consider and respect the local culture and customs.

At SEDCO Holding, the Saudi Economic and Development Company, family involvement in volunteering grew from the interest of employees. As Omar Al-Arabi, Section Head-CSR expressed it, “We have a lot of employees that say, 'Hey, I want my kids to grow up to be like me; how can I engage my kids and build this mindset with them.' So we’ve had many requests. We’ve frequently conducted events where we invite family members of employees, whether it’s their spouses or their children to come and participate and collaborate with us. That extends the gratification of it.”

SEDCO Holding makes a significant investment in documenting on video all its events, enabling employees to share the experiences with their families. “This instills a sense of employee pride in what they have done and creates a beautiful narrative” that also serves to demonstrate to other employees the opportunities for involvement.

Korea’s POSCO Group, one of the world’s largest steelmaking companies, welcomes employees and their families to volunteer. The company registers their participation through its in-house system and provides volunteers both insurance and cumulative service certification plaques.

One of the significant COVID-related changes in the volunteer program at Sage, the global market leader for technology for small and medium businesses, has been the expansion of family involvement. In the past, its programs have been event-specific, usually during summer holidays, and open to anyone an employee considers to be family. During the pandemic, Sage has encouraged colleagues to do volunteering with their families, friends or anyone in their “bubble,” because they’re at home together. This new approach has been very successful, something the company wants to grow over the next few years.
Involving Retirees

Companies with the strongest retiree volunteer efforts tend to be those that might be termed “heritage companies,” that is, companies with long histories, generally deep roots in their communities and significant numbers of retirees who have a well-formed allegiance to the company and wish to remain associated with it.

**TELUS**, the Canadian national telecommunications company, for example, has its origins in the local telephone companies in the early years of the 20th century. The firm traces its community service activities back to the Telephone Pioneers of America which, in the 1920s, created community chapters and in the 1950s made community service part of its mission. In many of those first activities, members used their skills to meet the needs of people with disabilities, with a focus on the hearing-impaired.

Today, the TELUS Community Ambassadors program brings almost 5,000 active employees and retirees together in 23 clubs throughout Canada to provide volunteer-based services to their communities.

The month of May is a major focus of their volunteering. In 2019, they had over 27,000 volunteers in over 2,000 activities benefiting more than 500 charitable organizations. These activities were designed to be all inclusive and to “encourage and inspire everybody to bring to the table what they uniquely have to help in their communities.”

The roots of TELUS are in western Canada; however, with expansion TELUS now spans coast to coast. As a result, there is a greater number of retirees who have longer histories with TELUS in the west given long-established social programs to keep them connected with and supported by one another. In the east, retirees play active roles in fundraising and volunteering in their communities. As a result, the company has a “very diverse approach to contributing to the community nationwide.”

“Our retirees built the legacy. We recognize by working directly with them that they’re proud and happy to represent TELUS. They’ve got so much knowledge and so much passion for the community.”

At Cargill, employees and retirees volunteer individually, with coworkers in team activities, or through Cargill Care Councils. They seek to reduce hunger in nearby communities, improve nutrition, strengthen educational opportunities and protect global natural resources. There are over 350 Care Councils spread across all of the 70 countries where Cargill does business. The Councils are made up of both employees and retirees. The company makes the point that the Councils share the common goal of “ensuring that Cargill is investing its financial and human resources to help meet our business objectives while serving local communities.” The Councils identify needs, build partnerships in the community, put together volunteer opportunities for individual and group engagement and evaluate the company’s impact in the community.
At CaixaBank in Spain, roughly 19% of their 12,000+ volunteers annually are retirees. The bank sees their retirees as people who have been important to the company over many years, perhaps decades, as people they don’t want to lose, even after their working relationship is finished. “It is a way to keep alive the people who worked in the company, and are now volunteers.”

Intel retirees in the U.S. are eligible to apply for matching grants to benefit the organizations they serve as volunteers. The company will contribute $10 U.S. per hour volunteered with a school or a government-recognized tax-exempt nonprofit organization – the same benefit available to active employees. In 2019, over 600 retiree volunteers reported over 145,000 hours, generating Intel support of nearly $1.5 million for 700+ organizations. The Intel Retiree Organization tells the stories of what these volunteers are doing.

A similar contribution opportunity, based on hours served, is available at Medtronic. Retirees in the company’s home state of Minnesota in the U.S. have established the Medtronic VSP Retiree Group Minnesota which is affiliated with the company but led by its own board of directors. The group regularly organizes volunteer events for its members. Retirees are also eligible to join company-sponsored volunteer activities when invited by a current employee.

In South Africa, FirstRand Ltd. matches volunteer hours by retirees with financial contributions to the organizations they serve just as it does for active employees.

Volunteering at Itaú Unibanco in Brazil is managed by Mobiliza Itaú Committees made up of active employees and retirees.

CEMEX retirees in the United States are often invited to participate in the company’s volunteer activities, a practice that now is emerging in its home country of Mexico.

EDP in Portugal invites retirees to join active employees, family members, clients and partners in company-organized volunteer activities, including in skills-based opportunities.
Activating Business Customers, Retail Consumers, Clients and Partners

For Fujitsu Global Business Group (GSBG), involving business customers in volunteering is such an important part of what the company wants to achieve that a key performance indicator (KPI) has been developed to track that. There are dual goals: developing sensitivity to the cause volunteering is addressing and establishing relationships that go beyond the service itself. Local teams are encouraged to keep an eye on the visitor list to identify who they might be able to get involved.

Tim White, Corporate Executive Officer, Executive Vice President, Fujitsu Global, believes that Fujitsu and the Japanese culture are very good at developing and sustaining “true partnerships” and that this approach exemplifies that. He says: “This relates perfectly to why it is important to be involved in responsible business activities. You form these partnerships that become more than just a financial transaction, or a contractual transaction. You're in it together. It makes your relationship with those customers that much stickier…. It's great for business. If you're doing things with customers in the community, there's more to it than 'I will turn over my contract tomorrow with you’ because you've got that genuine partnership.”

Owing to the characteristics of its businesses, Empresas Polar in Venezuela maintains a commercial relationship with more than 1,100 franchisees who carry Polar’s products throughout the country. Many of the franchisees carry out solidarity activities to support the communities they serve, investing large sums of money in school supplies, sports or musical instruments for schools or communities.

Polar shares experience and its portfolio of volunteer activities with the franchisees, to guide and model the culture of donating time and talent and at the same time generating a more impactful investment of resources. The Polar team helps franchisees take advantage of the company’s activities, building their understanding of the strategy behind the program and encouraging them to do it the right way: “doing good, doing it well.”

This type of sharing becomes a win-win process because the franchisees have an extraordinary reach into the country. They go everywhere, they reach the most remote corners of the country and people perceive them as the “Polar People.” At the same time, Empresas Polar is leading a cultural change about the concept of volunteering among the franchisees.

FNC Entertainment is a comprehensive entertainment company leading the “Korean Wave,” that is, the increase in the global popularity of South Korean culture. Established in 2006, FNC is among the top five Korean entertainment companies doing business in the areas of management and production of concerts, albums, dramas and movies. The
company has a deep commitment to supporting children and adolescents from vulnerable groups both in Korea and around the world, working toward the vision reflected in the motto “For a world where all children are loved.”

The representative overseas project is “School 5025,” which is a school building project that supports educational infrastructure such as teachers, parents and programs by building schools in remote villages in developing countries. Their first five schools and two children’s centers are in Burkina Faso, Philippines, Myanmar, Cambodia, Mongolia, and Ecuador.

FNC’s artists are at the forefront of the corporate efforts through their personal volunteer engagement and its impact on their fans. One goal is to help fans participate through social networking (SNS) where FNC artists have over 30 million followers. For example, when Korean Wave stars and volunteers went privately to the company-sponsored elementary school in remote Myanmar, fans from neighboring countries came to the school themselves and participated in volunteer work and then formed a support group to continue assisting the school.

InterCement in Brazil proactively reaches out through its purchasing department to invite its suppliers to join them in their Day of Doing Good either as volunteers or contributing and supporting with their products and services: materials, transportation, food, a graphic designer to help with the design of the campaign, banners, etc. “We make many alliances for the success of this program. We teach other companies and their partners so that they understand the value of voluntary action and we support them in their programs.”
The cornerstones for **Sage Foundation** focus on the 22 markets where they operate, and the goal of unifying Sage colleagues, their business partners and their customers in shared effort. Their operational goals emphasize the growth of volunteering, including that done by business partners and customers. They also focus on completing their current fundraising campaign and launching their next one as well as supporting the nonprofit sector more broadly with their technology and expertise through product discounts, skills and trainings. They see that the opportunity to volunteer is increasingly important not only for their colleagues but for family members, partners and customers.

The program has dedicated staff and an online portal where partners can sign up to volunteer and track their fundraising efforts. Even with COVID-19, it has been successful in engaging partners in online volunteering. The foundation has become a valued support for team-building activities with colleagues, partners and customers.

There is a strategic focus on collaborative volunteering at **Dell Technologies**, a commitment to “bringing customers along on this journey” by sharing Dell’s social impact goals and plans and opening the door to conversations and, ultimately, to partnerships. Dell equips its own “salesmakers” to have conversations on collaboration with their business customers. In some cases, that draws them into Dell’s own volunteer activities. At other times, Dell employees may join customers’ activities. Dell tracks how these joint social pro bono ventures affect its bottom line and sales growth.

One example: Dell employees joined employees at their customer MetLife, in Charlotte, North Carolina, in a community clean-up project following a major storm. That led to conversations about what else the companies could do together. The result was a partnership to conduct pro bono consulting workshops for NGOs that are supported by each company.
The Dell Volunteer Project Management Group was created by team members to use their skills in support of NGOs. It has become a global initiative operating, for example, in Russia, Malaysia and Ireland as well as in the U.S. Using the curriculum of the Project Management Institute, they help build the skills of nonprofit managers, helping them move toward their own certification. The volunteers receive continuing education credits toward maintaining their own certification.

The project began by working with organizations known personally to the volunteers. Now, some are tapping into nonprofit customers of Dell, working through the company’s account executives to identify and recruit them. So the customers of the company become beneficiaries of the company’s employee volunteers.

Cognizant seeks opportunities to actively engage with clients and strategic technology partners in its volunteer programs to achieve social, reputational and business impact. Social impact comes through tactical partnerships with clients in specific initiatives to support each other’s social priorities. The company achieves positive reputational impact through partnering with strategic technology partners, using their technology products for social good. For example, Cognizant associates trained college students on Salesforce Modules and helped them earn achievement badges. Salesforce gave licenses for the Salesforce Trailhead platform free of cost, and Cognizant associates administered the training.

During the pandemic, Cognizant and Microsoft partnered with a Singapore government agency to set up Virtual Digital Clinics for senior citizens to get help from volunteers on their smartphone usage and thrive in the digital-driven new normal. Cognizant was awarded "Microsoft Partner of the year for societal impact" for this program. Similarly, Cognizant has been a part of Microsoft’s Enabler program to enable employability for Persons with Disabilities in the Asia-Pacific region. These strategic partnerships with clients to work on long-term social change goals have had a positive business impact.

CaixaBank believes that everyone needs to have the opportunity to be involved in creating a more equal and fair society. They actively invite employees, retirees, friends, family, business customers and retail consumers into their volunteer activities. The Bank’s Social Week receives particular emphasis. In 2020, the program had some 11,000 participants carry out almost 180 virtual activities in partnership with 111 NGOs. Ongoing programs with committed continuing participation also are open to these audiences.
Corporate Volunteering for a Post-Pandemic World