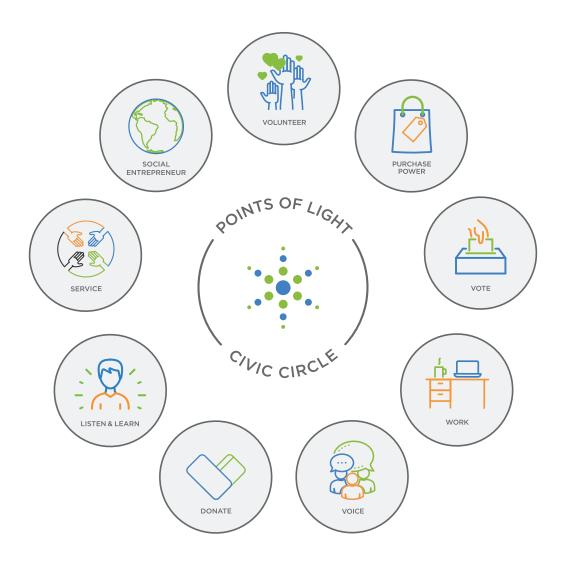


ABOUT POINTS OF LIGHT



Points of Light is a nonpartisan, global nonprofit organization that inspires, equips and mobilizes millions of people to take action that changes the world. We envision a world in which every individual discovers the power to make a difference, creating healthy communities in vibrant, participatory societies. Through 177 affiliates across 38 countries, and in partnership with thousands of nonprofits and companies, Points of Light engages 5 million volunteers in 16 million hours of service each year. We bring the power of people to bear where it's needed most.

Points of Light created the <u>Civic Circle</u> to help individuals, organizations and companies understand that acting for the betterment of their defined community comes in many forms. We help them connect with opportunities to influence social issues. For companies, this framework helps identify the ways in which they can accelerate positive social change and empower their employees and stakeholders to take action and be a force for good. It's your system for changing systems.

For more information, visit pointsoflight.org

CONTENTS



Playbook Overview	4
Investment	5
Making the Investment Case	5
Questions to Support Your Planning	5
Strategies & Tactics	6
Integration	8
Making the Integration Case	8
Questions to Support Your Planning	8
Strategies & Tactics	8

Impact	11
Making the Impact Measurement Case	11
Questions to Support Your Planning	11
Strategies & Tactics	11
Inspiration	13
Making the Inspiration Case	13
Questions to Support Your Planning	13
Strategies & Tactics	13
Planning Checklist	15
Impact Measurement Worksheet	17

THE SOCIAL IMPACT PLAYBOOK

Points of Light condensed years of research and Corporate Social Responsibility (CSR) best practices into this easy-to-use Social Impact Playbook to help community engagement practitioners and purpose-driven professionals unlock their company's full potential for doing good. Regardless of your company's size or industry, the Playbook's framework and tactics can serve as roadmap to drive social impact more strategically and holistically in your community and business. Within each section, we highlight the community and business benefits, share questions to support your planning, and provide a menu of strategies and tactics to consider when strengthening and scaling your social impact and community engagement activities. This resource also includes a planning checklist to help you focus your efforts and put your ideas into action.

We hope this resource helps get you started or moves you along on your social impact journey and encourage you to further explore the free **Community for Employee Civic Engagement (CECE)** platform for additional social impact resources, templates and information to support your work.

OVERVIEW

THE SOCIAL IMPACT FRAMEWORK

Whether you're just getting started or looking to strengthen and scale your social impact and community engagement activities, the Playbook's framework and tactics can serve as roadmap to drive social impact more strategically and holistically in your business and community.

While your company may have intentions to do good, we know taking actionable steps can be overwhelming with so many causes to support and ways to do so, especially with limited staff capacity and resources. That's why we've boiled it down to The Four I's. Thinking strategically through this framework around investment, integration, impact and inspiration will help you understand all of the tools you have at your disposal to be a force for good. You'll be able to maximize your impact when supporting communities and advancing the causes you care most about.

THE FOUR I'S:

- **INVESTMENT:** How your company strategically invests its resources in community engagement and social impact activities through volunteerism, financial giving, in-kind contributions, civic engagement and advocacy.
- **INTEGRATION:** How your company strategically integrates social impact and community engagement throughout business functions, culture, policies and systems.
- **IMPACT:** How your company measures the social and business outcomes of your community engagement and social impact activities.
- **INSPIRATION:** How your company strategically leverages employee recognition and storytelling to inspire others to take action in supporting the causes and issues they care about.

UNLOCKING YOUR FULL POTENTIAL FOR DOING GOOD

We believe that companies, their employees and stakeholders can be transformative drivers of social change in communities around the world. Companies can have the greatest impact when they work at the intersection of their community needs, company resources and priorities, and employee interests. Understanding all three is critical to unlocking the full potential for your company to do good.



INVESTMENT



How your company strategically invests its resources in community engagement and social impact activities through volunteerism, financial giving, in-kind contributions, civic engagement and advocacy.

MAKING THE INVESTMENT CASE

Benefits to Your Community

- Revenue, resources and direct-cost savings from financial and in-kind contributions as well as human capital from hands on and skills-based volunteerism
- Capacity building and improved effectiveness, efficiency and reach of services
- Advocacy and awareness of community needs and issues
- Strategic partnerships that enable greater learning and engagement opportunities with employees

Benefits to Your Employees and Company

- Improved employee morale and sense of purpose from participating in and understanding the company's commitment to community engagement and support for social causes
- **Stronger recruitment and retention** for employees who are increasingly looking to channel their desire to support their community and social causes as part of their professional life
- Enhanced skill development and teamwork through hands on and skills-based volunteerism, leadership opportunities and working with employees across different teams and departments
- Bottom-line cost savings with employee retention and when compared to more costly investments in team building and leadership development programs
- Better brand reputation and loyalty from authentic and meaningful investments in community and work to support social causes and issues
- Greater support for your employees as community members as many may be directly impacted by the social causes issues that your company seeks to advance

QUESTIONS TO SUPPORT YOUR PLANNING

- Do you truly understand your community and nonprofit partners' needs or are you making assumptions? Have you asked them?
- Which nonprofits or community partners could directly benefit from the products or services your company provides? How about the skills of your employees?
- Do you understand how, when and why your employees like to volunteer?
- How are you engaging front-line and remote employees in your community engagement programs?
- How could you engage other employees, teams or committees to help scale your volunteer and giving efforts?



- Which causes and issues do your employees care most about?
- Which social issues are a priority for your company? Are these reflected in your giving, volunteerism and community partnerships?
- How is your company supporting employees and stakeholders as voters? Are you making it easier or harder for them to participate in elections and be civically engaged?
- How are you listening and learning from community and nonprofit partners?

STRATEGIES & TACTICS

EMPLOYEE ENGAGEMENT & VOLUNTEERISM

Hands On (Offsite) Volunteering - Companies are often most familiar with this type of activity, where employees are out of the office, volunteering directly with a nonprofit organization in the community. These activities can be part of a company-wide event, team building and leadership development program or ongoing opportunities for employees to volunteer throughout the year.

Hands On (Workplace) Volunteering - Volunteer projects at your workplace can provide a great opportunity to engage more employees, especially those with less flexible schedules. These can also free up capacity and space from nonprofits that would have otherwise hosted them at their facility. Examples of projects that can be done at an office might include assembling hygiene kits, organizing food drives, building bikes to donate or taking part in a letter-writing campaign. These volunteer activities can often be integrated into existing company events such as all-staff meetings, leadership retreats and even holiday parties.

Skills-based and Pro Bono Volunteering - Leveraging the professional skills and talents of your employees individually and as teams to serve the needs of nonprofit partners can provide a high-impact opportunity to support the organization and build its capacity. When effectively matched with a nonprofits' needs, these projects and experiences can also create excellent skill and leadership opportunities for employees while also building a strong sense of purpose for their work that they may not have otherwise felt.

Virtual and Remote Volunteering - Virtual volunteers complete short or long-term tasks and projects, typically off-site from the organization or person being assisted. Examples of virtual volunteering include translation services, virtual mentoring, digitally mapping areas for humanitarian organizations and managing crisis call

and text lines. These tasks and projects can be done individually, as part of a larger team or companywide initiative.

Board Training and Matching - Serving on the board of a nonprofit is one of the most impactful ways that your employees can volunteer their time, though companies often fail to realize that this can be a core component of your employee volunteer program. There are many online and local resources and organizations to help train employees about effective board leadership and help match them with nonprofits looking to expand their boards based on specific needs.

Issue Training and Education - When provided with training and education about the community or a specific issue, volunteers can create a greater impact and serve with a deeper understanding of the context and purpose of their work. It shows that your company is knowledgeable about community needs and has a desire to invest in your employees' personal and professional growth. As an example, if a company volunteers at a local food bank every quarter, it might also consider inviting the nonprofit to give a separate presentation to employees about food insecurity in their community. This step transforms your employee volunteers from participant in a transactional experience into informed advocate. There are endless learning experiences from "lunch and learns" with community leaders and subject matter experts, to first aid and disaster response training.

Volunteer Time Off - Volunteer time off (VTO), also known as paid release time, allows employees to volunteer "on the clock," whereas a flextime policy allows employees to adjust when they do their work to make time for volunteering during their work day. While this may seem like a significant investment up front, it is quickly becoming the standard to offer this sort of benefit. VTO policies help increase participation for other employee engagement programs, promote a culture of service, empower employees to support issues and organizations they care about and provide support to nonprofits during the day, when it's most often needed.

Program Structure and Management - An effective leadership or governance structure with formal committees, councils, teams and/or leads can help scale, strengthen and sustain your volunteer programs in addition to providing professional development opportunities for employees. Consider involving a diverse representation of employees across the company as well as those who are already passionate about the community and/or actively volunteering.



FINANCIAL CONTRIBUTIONS

Grants and Donations - While this form of giving can be achieved in a variety of ways ways, it can be one of the most significant ways your company chooses to support nonprofits and social causes. Financial gifts can also take on many forms, from unrestricted donations, grants to specific programs, event sponsorships and even more sophisticated impact investments and loans.

Workplace Giving Campaigns - These initiatives can be administered in a variety of ways, but typically involve providing employees with the opportunity to make charitable contributions through payroll deduction, often through an organization such as a local United Way. Some companies do team competitions to see who can raise the most money, while others tie their giving campaign to a week or month of service during which employees also volunteer. Keep in mind that not only can workplace giving campaigns raise a significant amount of money for nonprofits, they can also strengthen relationships with community organizations and educate employees about the impact of monthly giving.

Employee Gift Matching - Many employers offer matching gift programs that provide a "matching" (1:1 or greater) financial contribution to an employee's donation. You may want to set guidelines regarding organization eligibility, required documentation and the minimum and maximum amounts that can be matched. Gift matching programs is a great way to help nonprofits and empower your employees to support the causes and organizations they care most about.

Dollars-for-Doers – Dollars-for-Doers programs are another great way to impact your community while empowering your employees to support organizations and causes. These programs, also commonly referred to as "volunteer grants," involve the company making a financial contribution to a nonprofit where an employee, or group of employees, volunteers. Keep in mind that establishing an approval process to determine the organization's eligibility, hours requirement, donation amount per hour and employee eligibility (e.g., full-time vs. part-time), among other details, is necessary for a successful program.

IN-KIND CONTRIBUTIONS

In-kind Goods, Services and Space - Donating in-kind goods and services is a powerful way to support your nonprofit partners operationally. These non-cash contributions can take on many forms and provide companies with a valuable set of resources to leverage in their community engagement strategy. In-kind goods

could include products, supplies and materials (from printer paper to concrete), technology (hardware and software), meeting and event venues and advertising/PR space. Equally diverse are in-kind services that companies can provide, including professional and administrative services, printing and mailing support and even transportation services.

PUBLIC LEADERSHIP & ADVOCACY

Advocacy and Voice - Whether through launching awareness campaigns, forming coalitions, grassroots lobbying or amplifying the work and needs of your nonprofit partners, advocacy can play an important role in your community engagement program. Many companies are also increasingly leveraging the voice of their brand and senior leaders to take public stands on pressing social issues. A company's voice can be expressed in many ways — as a social media post by the company or CEO, an email sent to all internal and external stakeholders or an op-ed in a local paper.

Elections and Voter Support - Every business, no matter the size or industry, has a civic responsibility to support free and fair elections as stakeholders in our democracy. While a company may choose to be nonpartisan, there are many ways to promote voter turnout and education



INTEGRATION



How your company strategically integrates social impact and community engagement throughout business functions, culture, policies, and systems.

MAKING THE INTEGRATION CASE

Benefits to Your Community

- Access to greater resources and services beyond volunteers to address community needs
- Shifts partnership from transactional to transformational with companies and their employees

Benefits to Your Employees and Company

- Scale impact and responsibility of community engagement work across more departments and employees
- Strengthens company-wide buy-in for community engagement and social impact work
- **Demonstrates your organizational values** in action and commitment to community and advancing social issues
- **Enables multifaceted support** when responding to urgent and evolving needs of the community

QUESTIONS TO SUPPORT YOUR PLANNING

- How does community engagement and social impact show up in each of your business departments?
- Are you leveraging all of your communication channels to advance social causes and promote the needs and work of your community partners?
- Could your spending and purchasing be more impactful through the vendors and products you choose?
- Which employee groups could support your community engagement and social impact work?
- Are your leaders champions or participants in your community engagement programs?
- Is community engagement a standing agenda item on all staff and board meetings?
- Does your commitment to community show up in your values, policies and KPIs?

STRATEGIES & TACTICS

BUSINESS FUNCTIONS AND DEPARTMENTS

Human Resources - Employee and community engagement strategies often stem from this department as they have a pulse on the people and culture of the company. The key to a successful employee engagement program isn't simply to recognize the added HR benefits of employee volunteerism (e.g., morale, team building, skill development, sense of pride), but rather to plan them into the department itself. Here are several ways companies can



integrate community engagement: highlight your efforts in recruitment and onboarding materials, incorporate discussions of community engagement into performance reviews and use employee surveys to get feedback and input on community engagement programs and events.

Employee Events and Meetings - Incorporating volunteering and community engagement into existing employee events and meetings is a great way to build purpose into your company's culture and deepen your support for your nonprofit partners. This tactic also makes it easy for employees who may not always be able to leave the office to participate in a volunteer project within the community. Examples might include having a food or book drive as part of your holiday party, assembling hygiene kits or bikes to donate or writing cards and letters of support for a children's hospital. It's important to remember that integrating purpose into your meetings and events doesn't always need to involve an activity. Listening and learning from your community and nonprofit partners can be just as impactful. Think through how you might co-create learning opportunities with your partners to give a presentation or facilitate discussions at your next company event.

Marketing and PR - Leveraging the skills and resources of your marketing team can be a powerful component of your community engagement and social impact work. Companies often integrate this work in several ways: raising issue awareness, providing pro bono support and communicating their community impact work to stakeholders. First, companies can promote social issues and causes associated with a campaign or nonprofit across their marketing, advertising and PR channels. This option might include raising awareness and educating the public about food insecurity in the community or promoting a fundraising campaign or need for volunteers for an event hosted by a local food bank. Second, your marketing team can provide pro bono support directly to nonprofit partners to add additional capacity and needs to their work (ex., developing a new website, designing fundraising materials, helping with their social media strategy, etc.). Third, your marketing team can help articulate and communicate your community engagement programs and impact to internal and external stakeholders (ex., your company's website, annual and CSR reports, etc.). Finally, companies should consider developing cause marketing campaigns and products that have the dual purpose of driving revenue while also advancing a social cause or benefitting a nonprofit partner (ex., making a product or financial donation for every purchase).

Purchasing and Sourcing - Transparency is key. Your company's purchases and vendors are now

being evaluated around social issues and values — from reducing environmental impact to supporting women and minority-owned businesses to helping small businesses in your community. Your company's purchasing power can be an influential tool to address social challenges and issues when effectively integrated with your community engagement program. Understanding how your vendors and suppliers align (or don't) with your company's culture can help to highlight disconnects between your values and business operations. Being deliberate and strategic with choosing socially conscious products and vendors can help your company build purpose into this traditionally transactional work and help advance causes that you support.

LEADERSHIP AND CULTURE

Leadership and Board Engagement - "Lead by example," "top-down," "executive buy-in" — however you spin it, it's important. With engaged leadership and input from the board, advocating for greater investments in your program becomes easier and your strategy will have a higher probability of success. One way to keep your leadership and board informed and involved is to ensure that community engagement is a standing agenda item at all executive, companywide and board meetings. Sharing regular reports and advocating to make community engagement a standing agenda itemis great ways to ensure that your senior leadership and board members are educated and informed on how the company is having an impact. While staying informed is helpful, actually engaging these leaders in your program is equally important. Rather than dropping in for a lastminute photo opportunity, plan your volunteer programs in coordination with your senior leaders to encourage their participation and elevate them as champions of the project or cause. You'll get the benenfit of their buy in and participation in an authentic way.

Mission and Values - No longer is simply providing a good or service considered the acceptable standard for business. A company's purpose must align with a greater community benefit. Formalizing this commitment publicly can raise the expectations to do good in authentic and significant ways and generate greater support and buy-in from stakeholders such your employees, board members and customers. The most important proof point when aligning your purpose with community is to state your company's intentions, then back it up with action. Your community engagement strategy can be the key to those driving actions that, ultimately, strengthen the value of your company's brand recognition and trust.



Employee Resource Groups - Engaging your employee resource groups (ERGs) as stakeholders with your community engagement and social impact work can provide an effective way to support causes and issues that matter most to your employees. Not only can they provide valuable feedback and ideas, they can also champion causes and scale your efforts in planning their own community engagement projects and learning experiences for the company. Companies might also consider establishing a service or community chair

within your ERGs to help formalize this role and provide leadership development opportunities for employees.

Department Goals and KPIs - If your company is all-in and looking to integrate a larger systemic shift toward community engagement, consider including engagement activities in performance reviews and department goals/KPIs. This creates a direct and tangible incentive for leaders, and it also helps measure and benchmark your company's progress.



IMPACT MEASUREMENT



How your company measures the social and business outcomes of your community engagement and social impact activities.

MAKING THE IMPACT MEASUREMENT CASE

Benefits to Your Community

- Ensure true needs are being served by focusing resources on the drivers of social outcomes
- Access greater support by efficiently using resources and quantifying ROI
- Develop stronger partnerships with companies by developing shared objectives and outcomes

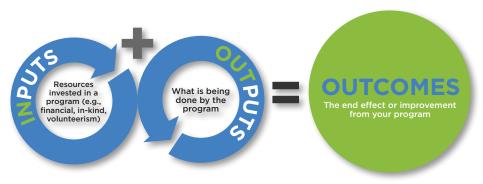
Benefits to Your Employees and Company

- Maximize the impact and return on your philanthropic and community engagement investments and activities
- Advocate for additional resources to strengthen and scale your social impact programs
- Generate buy-in from leadership and provide them with impact data to communicate to stakeholders
- Benchmark your work to promote continuous improvement with your programs

QUESTIONS TO SUPPORT YOUR PLANNING

- Which impact metrics are you currently tracking for your community engagement work? Are they inputs, outputs or outcomes?
- Have you discussed with your nonprofit and community partners how invested resources drive social outcomes?
- Do you understand how your social impact work and community engagement programs may have a quantifiable positive impact on different parts of your business?
- What are you doing with the impact data you track? Is it reported to internal and external stakeholders?
- How are you using your impact data to make improvements to your social impact and community engagement programs?

STRATEGIES & TACTICS





Social and Business Impact Metrics - Understanding and measuring the social and business impact of your community engagement work is integral to ensuring the greatest impact from your investments. To better understand the metrics of social impact, consider the following example of employees volunteering to tutor students in an afterschool program and a pro bono/skills-based volunteer program. These definitions might seem academic, but it is important to grasp the concepts that help you successfully track, measure and advocate for your programs.

METRIC TYPE	SOCIAL IMPACT EXAMPLE Afterschool volunteer tutoring program	BUSINESS IMPACT EXAMPLE Pro bono/skills-based volunteering program
Quantitative outcome metrics The observed effect, change in condition or resulting improvement	Number of students with improved testing scores or grades	Percent increase in a specific skill competency based on pre/post survey of employees participating in the program
Qualitative outcome measures Success stories and predefined satisfaction metrics	Survey given to students to capture satisfaction level with program and feedback	Survey given to participants to capture satisfaction level with program and collect feedback
Outputs What is being done and driving the outcomes?	Number of tutoring sessions offered	Number of projects completed
Inputs What is being invested and who is participating in the program?	Number of students	Number of employee volunteers

Measurement Tools and Strategies - Once you determine the community and business metrics you want to track, start to compile this information into a dashboard report. Centralizing and organizing these metrics will not only reveal greater insights, it will also help you communicate the value and impact of your volunteerism and community investments to key stakeholders. Depending on your company size and budget, you might also consider a platform specifically built for employee engagement that can greatly help you manage and track your philanthropic and community programs. Many of the platforms are categorized by three main functions:

- **Volunteering and engagement:** finding volunteer opportunities, volunteer event management, hours recording, employee fundraising, surveys, impact measurement
- Employee giving: matching gifts, payroll deduction, in-kind donation requests, reporting
- **Company grants:** funding applications, funding disbursements, grant recipient reports, dashboard reporting and report management

No single technology platform is the answer to all employee engagement and impact measurement needs, however a successful community engagement program is possible without such technology. The larger you scale your employee engagement program or the more data you're looking to track, the more likely technology can help you achieve your goals and prove the business case for community investment.

INSPIRATION



How your company strategically leverages employee recognition and storytelling to inspire others to take action in supporting the causes and issues they care about.

MAKING THE INSPIRATION CASE

Benefits to Your Community

- Strengthens relationship with supporters including volunteers, donors, advocates and board members
- Reach new audiences to raise awareness about social issues, community needs and the work of nonprofit partners

Benefits to Your Employees and Company

- Increase sense of pride and purpose among employees as well as companywide
- Encourage additional support and action from employees and other community members

QUESTIONS TO SUPPORT YOUR PLANNING

- Do you know how your employees are involved in their community?
- How are you celebrating the work of your employee volunteers and those who volunteer in their communities outside of company-sponsored event?
- Have you asked your nonprofit and community partners how you can help amplify their work and tell their stories?
- Is your company and its employees using a hashtag for your community engagement work?
- Which content are you capturing at your volunteer events? Is it documenting a project or telling a story of impact?
- How does your community engagement show up in external communication and marketing materials?

STRATEGIES & TACTICS

Recognition - Recognition includes all the ways an organization, manager or peer is able to acknowledge, validate, praise and appreciate the commitment, hard work and success of colleagues. Building a volunteer recognition strategy involves thanking employee volunteers and volunteer leaders in a way that acknowledges their contributions. An effective volunteer recognition strategy has the right mix of formal and informal efforts along with incentives and rewards. Formal recognition is typically managed by the team leading your employee engagement work and often includes certificates, events and competitions that honor volunteer or community engagement achievements. Informal recognition occurs in the daily interactions between volunteers and your company when program staff or other leaders and peers convey appreciation for the volunteers' work.

Rewards and Incentives - Rewards and incentives can also be leveraged as part of your recognition strategy. A reward is an award given in recognition



of service, effort or achievement. It can be tangible like a certificate, gift card or merchandise, or an intangible perk such as additional paid time off to volunteer, the opportunity to meet with senior leaders or an article written about a stellar volunteer. An incentive provides motivation or encouragement to complete certain actions or increase effort to meet specific objectives. Incentives are typically time-bound, measurable and associated with a specific reward. The achievement of an incentive may also be accompanied by recognition.

Storytelling - Take pride in celebrating and showcasing your community engagement program, employee

volunteers and nonprofit partners. It is important that this storytelling take place both internally and externally, and also year-round (i.e., not simply during volunteer projects). Whether through social media, internal newsletters, emails from leadership, press releases or annual/CSR reports, it's important to communicate the "why" when telling a story of impact. Why does your "volunteer of the month" feel so passionate about supporting their community or advancing a social cause? Why is the work of your nonprofit partner critical to addressing community needs? Why do they need additional volunteer support and resources to carry out their mission?



SOCIAL IMPACT PLANNING CHECKLIST

INVESTMENT			
	Strategy & Tactics	Notes	
	Employee Engagement & Volunteerism		
	Hands On (Offsite) Volunteering		
	Hands On (Workplace) Volunteering		
	Skills-based and Pro Bono Volunteering		
	Virtual and Remote Volunteering		
	Board Training and Matching		
	Issue Training and Education		
	Volunteer Time Off		
	Program Structure and Management		
	Financial Contributions		
	Grants and Donations		
	Workplace Giving Campaigns		
	Employee Gift Matching		
	Dollars-for-Doers		
	In-Kind Contributions		
	In-kind Goods		
	In-kind Services		
	In-kind Space		
	Public Leadership & Advocacy		
	Advocacy and Voice		
	Elections and Voter Support		

INTEGRATION				
	—	0	Strategy & Tactics	Notes
			Business Functions and Departments	
			Human Resources	
			Employee Events and Meetings	
			Marketing and PR	
			Purchasing and Sourcing	
			Leadership and Culture	
			Leadership and Board Engagement	
			Mission and Values	
			Employee Resource Groups	
			Department Goals and KPIs	

IMPACT				
		0	Strategy & Tactics	Notes
			Social Impact Metrics	
			Business Impact Metrics	
			Measurement Tools and Strategies	

INSPIRATION				
		0	Strategy & Tactics	Notes
			Recognition	
			Rewards and Incentives	
			Storytelling	

IMPACT MEASUREMENT WORKSHEET

PROGRAM OR ACTIVITY:			
COMMUNI [*]	TY IMPACT		
METRIC	TRACKING METHOD		
<u>Inputs</u>			
<u>Outputs</u>			
Outcomes			
BUSINES	SIMPACT		
METRIC	TRACKING METHOD		
<u>Inputs</u>			
<u>Outputs</u>			
Outcomes			

