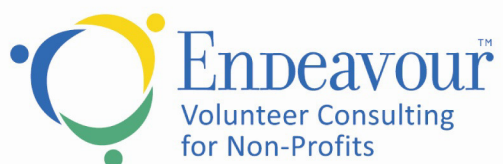


The Business Case for Pro Bono and Skills-Based Volunteering in Canada

By Helen Seibel and Andrea Wong



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Making the Case

Why pro bono and skills-based volunteering matter to companies

Research shows the many motivations and benefits for both individuals and companies to engage in pro bono and skills-based volunteering, including professional development, enhanced reputation and innovation. The U.S. is currently leading a growing global movement in pro bono and skills-based volunteering with more than 500 companies, ranging from small businesses to global corporate leaders, having pledged to provide \$2 billion worth of skills-based volunteer and pro bono services through the Billion+Change campaign. Around the world, corporate leaders like HP and Accenture are engaging their employees in pro bono and skills-based volunteering through intermediaries like Taproot Foundation in the U.S., Pro Bono Lab in France, Service Grant in Japan and Huizeren in China.

In Canada, Endeavour Volunteer Consulting for Non-Profits (Endeavour) and AstraZeneca Canada formed a pioneering partnership to engage employees in pro bono and skills-based volunteering. Evaluation results from the partnership and pilot project show that there has been a positive impact on employees, the company, the non-profit client and the community. With the changing demographics and increasingly competitive business environment, pro bono and skills-based volunteering represent not only a creative component of a company's corporate responsibility strategy, but also an innovative approach to employee engagement, leadership development and talent retention. In this report, AstraZeneca Canada and Endeavour make the business case for companies to engage in pro bono and skills-based volunteering in Canada.

Executive Summary

In 2012, AstraZeneca Canada partnered with Endeavour to offer an employer-supported skills-based volunteer project as part of its Corporate Responsibility platform and approach to employee engagement. Using the Endeavour model, the AstraZeneca volunteer team provided management consulting services to AstraZeneca's charitable partner, the Toronto Kiwanis Boys and Girls Clubs (TKBGC).

The AstraZeneca volunteer consulting team worked with TKBGC over six months, conducting research, analysis and a community town hall consultation to develop a strategic plan for TKBGC. Throughout the consulting engagement, the AstraZeneca volunteer team was supported with Endeavour training and resources. At the end of the engagement, an evaluation was conducted to measure the impact of the project. The evaluation findings show that the skills-based

volunteer project contributed to employee skills development, team building and leadership development, benefited the non-profit client, and enhanced the volunteers' capabilities to contribute to the non-profit sector.

The success of the partnership and skills-based volunteer project between AstraZeneca, Endeavour and the TKBGC was a result of a number of factors, including strategic and cultural fit, leadership and commitment.

This report outlines AstraZeneca's business case for pro bono and skills-based volunteering, the integration and launch of the skills-based volunteer project at AstraZeneca, the impact of the project on key stakeholders, as well as success factors and advice for other companies looking to launch an employer-supported pro bono or skills-based volunteer program.

AstraZeneca's Business Case

Why AstraZeneca supports employee volunteering

AstraZeneca has a long history of supporting the giving and volunteer activities of its employees, but has more recently made a concerted effort to proactively engage and support employees in corporately-organized volunteer initiatives.

There is a strong business case for employer-supported volunteering:

1) Attracting and retaining new talent

Both the Millennial Generation (Generation Y) and Generation X value the opportunity to make a difference in the world. Global research found that 91 percent of Generation X women and 76 percent of Generation X men want to contribute to the community through their work.¹

AstraZeneca's community programs aim to respond to this expectation.

2) Building leadership capabilities in employees

According to talent development expert, Josh Bersin, developing employees who are successfully able to lead is the most critical indicator of a company's future performance. AstraZeneca's own global survey found that after volunteering, 85 percent of employees found the experience helped to develop their 'Working Collaboratively' capability and 70

percent found it developed 'Developing People and Organization' skills.²

3) Building corporate pride and loyalty

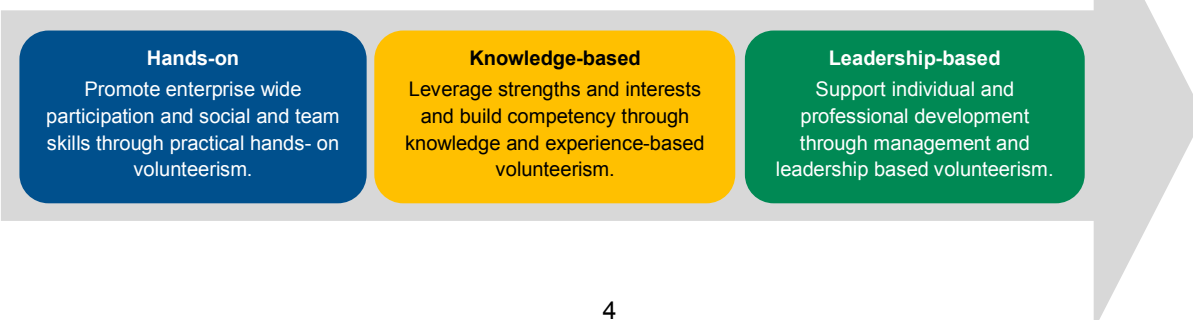
AstraZeneca's survey results show that those who volunteer are more proud to work for AstraZeneca and more likely to speak well of AstraZeneca than all employees. Additionally, 97 percent of volunteers felt positive towards AstraZeneca for providing the opportunity and 68 percent felt more motivated in their work afterwards.³

Why AstraZeneca introduced pro bono and skills-based volunteering to employees

AstraZeneca was looking for an opportunity to make a skills-based volunteer project available as part of the employee engagement element of its Corporate Responsibility platform. The company's approach to employee engagement is designed to offer something for everyone at every stage of the engagement spectrum, from hands-on volunteering to knowledge-based and leadership-based volunteering opportunities (Figure 1). The skills-based volunteer project in partnership with Endeavour was identified as an opportunity to deepen employee engagement and support professional development by moving employees along the continuum from knowledge-based volunteering opportunities towards leadership-based opportunities.

Figure 1: Moving people along a continuum of employee engagement at AstraZeneca

AstraZeneca's volunteer-based employee engagement opportunities aim to inspire and motivate employees to build stronger relationships with the non-profit sector, as well as contribute towards the growth and development of employees. The project with Endeavour is an important step, familiarizing employees with knowledge-based volunteerism and driving them towards leadership-based activities.



Launching a Skills-Based Volunteer Program

How AstraZeneca introduced skills-based volunteering to employees

AstraZeneca's culture of supporting employee volunteering and support from top leadership enabled the company to successfully integrate skills-based volunteering into the employee engagement elements of its Corporate Responsibility platform.

AstraZeneca worked through its senior leadership team to roll the skills-based volunteer project out to employees. Managers were asked to share the opportunity with their team, with specific consideration for employees who identified an interest in volunteering and non-profit sector work in their individual development plans. Managers were provided with an application form and information package for interested employees. The project was open to all employees from across the Head Office site.

When AstraZeneca employees applied to join the consulting team, they shared their motivations and expectations for the project, citing their interest in giving back to the

community, skills development, working with and learning from colleagues who they otherwise might not interact with, and learning more about non-profit organizations.

The eight volunteers selected for the first skills-based volunteer project represented different departments across the company. The team included those with skills in business development, strategic planning, product marketing, channel marketing, government relations, regulatory affairs and corporate responsibility. The team was also a good mix of individuals at different stages in their careers and within the company, including a vice president, a director, three senior managers, a manager and a project manager. In alignment with Endeavour's approach, one of the team members served in the role of engagement manager, providing leadership for the team and acting as the main point of contact with the client and Endeavour.

Advice for Launching a Skills-Based Volunteer Program

1) Gain leadership buy-in: Developing and running a skills-based volunteer program requires a certain amount of time, commitment and communication. Leadership buy-in from the top and at the management level is important to integrate the program into the company's culture. Demonstrate the business value of skills-based volunteering with the data and research available. Illustrate how skills-based volunteering can be integrated with human resources and corporate responsibility initiatives to enhance impact. Explain how working with an experienced non-profit intermediary can make the program and process effective and efficient.

2) Integrate skills-based volunteering with human resources (HR): Integrating skills-based volunteering with HR helps to ensure alignment with the company's talent management objectives (employee engagement, skills development, leadership development, talent retention). HR can also help to identify employee skill sets and high potential employees for the program.

3) Integrate skills-based volunteering with corporate responsibility: Integrating the skills-based volunteer program into existing corporate responsibility initiatives can deepen the company's community engagement and impact. A company can provide skills-based volunteer services to charitable partners, strengthening existing relationships and the charities it works with.

4) Leverage the expertise of a non-profit intermediary: Partnering with a non-profit intermediary like Endeavour to design, manage and evaluate a skills-based volunteer program helps ensure success. A company can leverage an intermediary's expertise and resources, particularly in non-profit needs assessment and selection; volunteer recruitment, orientation and training; project scoping, staffing and management; and impact evaluation.

The Model

How AstraZeneca and Endeavour worked in partnership

In 2012, AstraZeneca partnered with Endeavour to launch a skills-based volunteer project. Endeavour is an intermediary in Canada with the experience, expertise and resources to work with companies to provide skills-based volunteer opportunities to employees. Based on the Endeavour model, the AstraZeneca volunteers provided management consulting services to the Toronto Kiwanis Boys and Girls Clubs, working with the client over a six-month period to develop a strategic plan. Endeavour and AstraZeneca worked in partnership to launch, manage and evaluate the skills-based volunteer project through the following four stages of Endeavour's model (Figure 2).

1) Non-Profit Selection and Project Scoping

Endeavour and AstraZeneca worked together on client and project selection to ensure the organizational readiness of the charitable partner and to identify a project that matched with the skill sets of the AstraZeneca employees. Endeavour also worked with the selected charitable partner to develop a well-defined project scope that could be completed within the six-month project timeframe.

2) Volunteer Recruitment and Training

Endeavour and AstraZeneca developed job descriptions and guidelines to recruit, screen, select and staff volunteers. Endeavour provided the AstraZeneca volunteers with an orientation, including an overview of Canada's non-profit sector, sector-specific resources, and advice on consulting with the non-profit sector. Relevant skills training, such as workshop facilitation, was also provided by an Endeavour trainer.

"Our experience definitely reflects what the literature says, not just in terms of benefits back to our business, our volunteers and our community partner, but also in the appetite of employees for this kind of skills-based volunteer opportunity. At the end of the year, my VP called it an under-recognized success and asked that we run it again."

Helen Seibel
Senior Manager, Corporate Responsibility
AstraZeneca Canada

3) Project Management

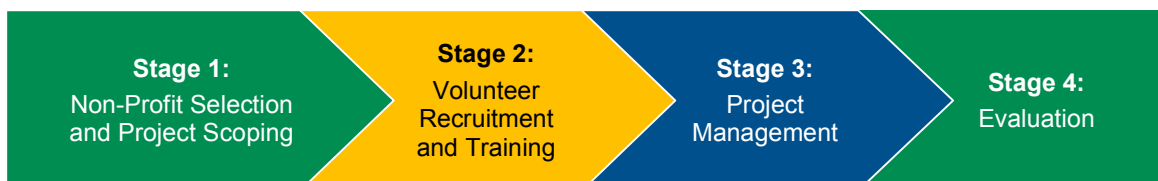
Throughout the engagement, Endeavour worked with AstraZeneca to manage the project, including staffing a seasoned Endeavour advisor on the project who acted as a mentor and resource to the consulting team. Endeavour and AstraZeneca had regular check-ins with key stakeholders, including the engagement manager and project advisor, to ensure the project was running smoothly.

4) Evaluation

Following the end of the project, Endeavour conducted an evaluation of the project via an online survey and interviews with the volunteers, non-profit client, and members of AstraZeneca's leadership team to measure the impact of the project. The impact data was summarized by Endeavour. Both AstraZeneca and Endeavour worked together to communicate and present the impact of the project and partnership through various channels.

Figure 2: Working in partnership through each stage of the model

Endeavour and AstraZeneca worked in partnership through each stage of the Endeavour model. Each stage employs best practices to ensure volunteer and client expectations are met, and that the deliverable makes an impact.⁴



The Project

Overview

The AstraZeneca team of volunteers provided management consulting services to the Toronto Kiwanis Boys and Girls Clubs (TKBGC), a charitable organization located in one of Toronto's priority neighbourhoods.

Problem Definition and Project Goal

Coming from a time of strong growth and significant environmental change, TKBGC was feeling the strain of additional expectations of the community and an absence of a clear way to prioritize its resources against the ever-changing environment. The organization was operating without a current strategic plan.

The TKBGC engaged the AstraZeneca consulting team to develop a five-year strategic plan that would align with the new Boys and Girls Clubs of Canada vision and mission. Based on the Endeavour model, the AstraZeneca volunteer team adopted a three-phase approach in its consulting engagement with the TKBGC.

Phase 1: Learning and Discovery

To better understand the client and more clearly define the objective of the consulting engagement, the AstraZeneca team reviewed the TKBGC documents and background materials, conducted an onsite meeting with the TKBGC staff, and held teleconference calls with key TKBGC stakeholders. The team completed a Statement of Work that specified the project objective, activities, timelines and deliverables for the six-month engagement.

Phase 2: Research and Analysis

To inform the development of the strategic plan, the AstraZeneca team conducted extensive stakeholder input and board collaboration, including a number of onsite meetings and work sessions with the TKBGC staff and a sub-group of the board of directors, and a community town hall consultation. The consultation hosted

stakeholders from across the community to gather insights and information about the role that the TKBGC should be playing in the community. Participants included Club staff, board members, parents, youth, police, community agencies and other non-profit organizations.

Through the consulting process, the team was able to identify and address a number of challenges that were limiting the potential success of the TKBGC, including the following:

- HR strategy and succession planning
- Revenue generation and diversification
- The need to strengthen the brand and differentiate in a "noisy" environment

For example, the team learned that the TKBGC's retention rate of members who move from its children's programs into its youth programs was much higher than what evidence-based research shows. This information speaks to TKBGC's ability to build relationships with young people and to develop a trusted space for young people to go to, which strengthens TKBGC's case for support with potential funders and partners.

Phase 3: Strategy and Delivery

The final stage of the consulting process involved synthesizing all the information and analysis. The AstraZeneca team spent several half-day work sessions focused on drafting strategic goals and objectives and identifying key projects.

At the end of the six-month consulting engagement, the AstraZeneca team presented the final deliverable to the board of the TKBGC. The team provided unbiased third-party recommendations on what the TKBGC's strategic plan should focus on and what it should not. Supporting the strategic goals were a set of strategic enablers along with a timeline, implementation plan and proposed measures of success.

Partnership Success Factors

Factors that made the partnership and pilot project a success

The following three factors were key to the success of the partnership between Endeavour, AstraZeneca and the TKBGC.

1) Mutually Beneficial

All three parties benefited from working together:

- For AstraZeneca, the skills-based volunteer program deepens employee engagement and supports professional development, while strengthening its relationship and impact with a charitable partner.
- For the TKBGC, the consulting project produced a strategic plan that will guide the charity's growth and strengthened its relationship with a corporate partner.
- For Endeavour, the partnership with AstraZeneca allowed the organization to adapt a model to the corporate sector and demonstrate the business value of skills-based volunteering. More importantly, it increases exposure of the benefits of skills-based volunteering and impacts more volunteers and non-profits.

2) Strategic and Cultural Fit

The partnership aligns with the strategic goals and culture of all three organizations:

- AstraZeneca has a culture of supporting the giving and volunteer activities of its employees, reflecting an appetite for a skills-based volunteer project. Endeavour's skills-based volunteer model is a strategic fit with the company's approach to employee engagement, providing employees with leadership-based volunteer opportunities and professional development. Endeavour also provides the infrastructure support to AstraZeneca, including a proven model of engagement and processes, and the non-profit expertise and resources that

complement the knowledge and skill sets of corporate volunteers. Four out of five volunteer respondents agreed that the training and resources from Endeavour improved their ability to consult with the client.

- AstraZeneca also selected to work with a charitable partner, helping to drive greater understanding and to strengthen their relationship and the impact of its community investment. The TKBGC also had a strategic project that fit within the chosen timeframe and that matched with Endeavour's areas of expertise.

3) Leadership and Commitment

The leadership and commitment of all partners were critical to success:

- There was strong support from top leadership at AstraZeneca, effectively giving permission to its volunteers to deliver on their commitment to Endeavour and the TKBGC. The AstraZeneca volunteers also had strong leadership from the engagement manager, keeping them engaged and committed throughout the six-month project.
- Both the TKBGC leadership staff and board members were extremely committed to the project. They made themselves very available to the AstraZeneca project team, and facilitated frequent meetings and discussions to help the team move through its strategic planning process.
- Endeavour's leadership provided a dedicated project advisor that served as a mentor and resource to the AstraZeneca team throughout the engagement, including liaising with the client to ensure the project was meeting expectations along the way. An Endeavour Executive also monitored the project to ensure the team had the supports it needed to succeed.

The Impact: A Corporate Perspective

The value of skills-based volunteering for employees and the company

Innovative professional development

A survey was conducted with the AstraZeneca volunteers ten months after the end of the project. All five respondents reported that the skills-based volunteer project contributed to their professional development, specifically improving their skills in the following areas:

- Support organizational development
- Develop strategic plans
- Negotiate with clients or colleagues
- Support others' development
- Collaborate with others
- Support accountability

Krystin Scheider, Regulatory Affairs Project Manager at AstraZeneca Canada, who was a consultant on the team, found the project not only gave her the opportunity to give back in a novel way beyond donating money or packing food boxes, but also the opportunity to learn new skills. "The experience really opened my eyes to working in the non-profit sector. I learned a lot about how to work with boards of directors and on projects outside the scope of what I do in my own career," said Krystin.

"Participation in [employee volunteer] programs, like the Endeavour initiative, boosts morale and engagement by creating opportunities for employees to deploy their skills to purpose-driven work beyond their day-to-day roles. It also provides a platform to further develop leadership, mentoring, communication and problem-solving skills that are crucial to the business environment."

Greer Hozack
Executive Director, HR and Communications
AstraZeneca Canada

According to the engagement manager, one of the greatest benefits of the skills-based volunteer project was that it helped build perspective and empathy – traits that are not only important for understanding the different needs of stakeholders, but also for leadership. AstraZeneca also recognized skills-based volunteering as an opportunity to enhance leadership capabilities among employees by giving people opportunities to step out of their traditional roles at work. Every individual on the team had an opportunity to lead a discussion, presentation, research or project stream with the client and stakeholders. "The engagement manager encouraged each team member to find that leadership within the project...that in and of itself builds leadership capabilities in people," said Helen Seibel, Senior Manager of Corporate Responsibility at AstraZeneca Canada.

Increased employee engagement and pride

The skills-based volunteer project also enhanced employee engagement and pride through team building, fostering new work relationships, and deepening employees' understanding of and commitment to the company's culture and values. Through the project, the volunteers worked with colleagues that they had never worked with before. The experience was seen as a highlight of the year, particularly at a time when the company was undergoing restructuring. "The [project] team was extremely engaged," said Alison Simpson, Vice-President of Strategy and Future Portfolio at AstraZeneca Canada, who served as the engagement manager. "We spent increasingly more time working together on the project, and we were very proud of our end product. [The skills-based volunteer opportunity] really shows that AstraZeneca and its employees care about the community and about giving people the opportunity to develop and grow. I think it has benefits across the whole employee base."

The Impact: A Community Perspective

The value of skills-based volunteering for the community

When Endeavour followed up with the TKBGC, the organization had finished developing a work plan that the board committees and staff were in the process of implementing to achieve the goals set out in the strategic plan developed by the consulting team. The evaluation shows that the skills-based volunteer project was not only a valuable process for the TKBGC in gaining direction and focus in its strategy moving forward, but that it also developed the capacity of the volunteers to enhance future contributions to society.

A new perspective and strategic directions

The AstraZeneca volunteers helped the TKBGC to see what they were succeeding at as an organization, what could be improved upon and how the organization could position itself to enhance its impact in the community. Ian Edward, Executive Director of the TKBGC, saw the consulting engagement with the AstraZeneca volunteer team as a valuable process in providing the organization with this clarity and direction for the future:

"[W]hy it was such a fantastic process is that [the volunteers] took the time to do the background work. They assisted us in doing a complete community consultation, so the input that we received in the process from all of our stakeholders... ended up being the most valuable in giving us some real directions in our new [strategic] plan... What really came out of the strategic plan was that we have the ability and the space now to position ourselves as the real youth services provider. That is what I think is most exciting."

Respondents from the TKBGC agreed that the consulting engagement will help the organization focus on priority tasks related to its mandate.

"The talent of the individuals that came from AstraZeneca was phenomenal as was their commitment and enthusiasm for what we did and where we were in our processes. The team, using their own expertise in their different areas, really brought a great amount to the table."

Ian Edward
Executive Director
Toronto Kiwanis Boys and Girls Clubs

Enhancing contributions to society

The skills-based volunteer project also helped the AstraZeneca employees to develop the knowledge, skills and interest to enhance future contributions to the non-profit sector. All employee respondents strongly agreed that the skills-based volunteer project increased their ability to contribute to society. For example, non-profit governance was a new area for the AstraZeneca team, and one of the most significant learnings for the volunteers was how to negotiate and navigate through the board and executive director relationship. The town hall community consultation was organized and run completely by the AstraZeneca team, also a first in stakeholder engagement for many of the team members. The skills-based volunteer experience also increased knowledge about the non-profit sector. In addition to non-profit governance and the executive-board interaction, the volunteers also learned about non-profit funding mechanisms and the sector's major challenges, and gained a better understanding of the types of people that work in the sector. Most respondents plan to increase the number of volunteer hours they contribute each month.

Endnotes

¹Amanda MacArthur & Alicia Bonner Ness, “Skills-Based Volunteering: The New Executive Training Ground,” Stanford Social Innovation Review, January 4, 2013.

²AstraZeneca Survey of Young Health Programme Volunteers, November 2011.

³Ibid.

⁴For some pro bono best practices, see “Designing for Impact: A guide to the five tenets of high-quality pro bono service to create maximum impact pro bono programs” by Taproot Foundation at http://www.taprootfoundation.org/docs/Designing_for_Impact_Framework.pdf.

Acknowledgements

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About Endeavour

Endeavour Volunteer Consulting for Non-Profits (Endeavour) is a registered Canadian charity that provides management consulting to improve organizational capacity and community impact. Endeavour recruits and trains volunteers to provide management advice to local, national and international non-profit organizations based in Canada, helping communities in many areas, such as the arts, children and family services, disabilities, education, environment, healthcare, immigrant services, rural development, skills training, poverty relief, and youth development.

Endeavour works with companies in Canada to offer pro bono and skills-based volunteering opportunities to employees that contribute to employee engagement, leadership development, talent retention and corporate responsibility goals. Endeavour is based in Toronto, Ontario. For more information, please visit www.endeavourvolunteer.ca or email partner@endeavourvolunteer.ca.

About AstraZeneca

AstraZeneca is a global, innovation-driven biopharmaceutical business that focuses on the discovery, development and commercialisation of prescription medicines, primarily for the treatment of cardiovascular, metabolic, respiratory, inflammation, autoimmune, oncology, infection and neuroscience diseases. AstraZeneca operates in over 100 countries and its innovative medicines are used by millions of patients worldwide. The company's Canadian headquarters are located in Mississauga, Ontario.

As part of AstraZeneca's commitment to improving the health and quality of life of Canadians, the company collaborates with community-based organizations in three key areas – to stimulate an interest in science among Canadian youth, strengthen capabilities and capacity within our healthcare system, and improve the mental and emotional well-being of disconnected and vulnerable youth ages 10 to 19 through AstraZeneca's Young Health Program. For more information, please visit www.astrazeneca.ca.