

Global Employee Engagement: Challenges and Solutions



LBG ASSOCIATES

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Introduction to the Research and Methodology

In 2007, LBG Associates and LBG Research Institute published “Global Community Involvement,” a research study that provided the first comprehensive look at companies taking their community involvement programs global. That report identified the key to success as “adopt and adapt:” combining the adoption of a global community involvement strategy and the flexibility to allow for the different cultures, needs, norms and values of the particular location.

This study takes the research a step further, looking at how companies have used the “adopt and adapt” approach in designing and implementing global employee engagement programs. The focus of this work is on the particular challenges of global engagement and the solutions companies are using in the real world to overcome or minimize the challenges.

Methodology

To accomplish this goal, LBG Associates interviewed 36 multinational companies and six service providers about their experiences implementing global employee engagement. In addition, we gathered benchmarking data on the different employee engagement programs via an online survey. The data appear in the sections in which these programs are discussed.

The companies interviewed ranged from those just beginning to go global as well as companies with many years of experience running programs internationally. In addition, LBG Associates reviewed existing research on global corporate giving and volunteerism as background for the interviews.

Changes Since 2007

The interviews revealed that companies have made great progress in implementing global employee engagement since our survey in 2007. The presence of employee engagement programs in some or all of multinational companies’ locations has increased across the board in the past seven years. For example, nearly 74% of companies surveyed today have a Dollars for Doers program in at least one location, whereas just 35% said the same in 2007. The presence of workplace giving rose from 53% to 72% and Matching Gifts from 35% to 88%.

To make such progress, the companies interviewed have had to face head-on a multitude of challenges, including managing from across the globe, vetting local NGOs and overcoming cultural objections to volunteering. Some have employed service providers to help, while others have gone it alone. This report reveals that global companies have been every effective at adopting and adapting, and provides concrete advice to those just getting started on their global journey.

About LBG Associates

LBG Associates is a woman-owned consulting firm focused on designing, implementing, and managing corporate citizenship and community outreach programs and initiatives. Founded in 1993 by Dr. Linda Gornitsky, LBG Associates is committed to providing clients with creative and innovative solutions in a personal, professional, cost-effective, and timely manner.

LBG Associates drives social change through:

- Advice to help companies develop strategic, innovative programs that help communities become better places to live and work;
- Implementation of strategies, programs, policies, and procedures, especially for companies with limited time and/or expertise;
- Research on cutting-edge issues, groundbreaking trends, “best practices,” and pressing social needs and concerns;
- Training that equips practitioners with the knowledge and skills to become “strategic thinkers” and to grow and advance in the field of corporate community involvement.

Advice, implementation, research, and training represent LBG Associates' philosophy about advancing socially responsible business practices. Although steeped in research and scientific methodologies, the firm's approach to corporate community involvement is more of an art than science, more creative than formulaic.

Specific Services Provided

In response to clients' needs, LBG Associates' services include the design, implementation, management, and evaluation of entire community outreach/citizenship programs. The firm helps clients establish and maintain images as good corporate citizens and socially responsible companies by offering custom tailored services in the following areas:

- Foundation and corporate giving;
- Strategic relationship development;
- Special events planning and sponsorships;
- Program evaluation; and
- Employee giving and volunteerism;
- Strategic communications development;
- Research and benchmarking capabilities;
- Training and staff development.

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LBG Associates Leadership

Linda B. Gornitsky, Ph.D., President

Dr. Gornitsky is president and founder of LBG Associates, a consulting firm that specializes in the development of strategic corporate citizenship and employee engagement programs, benchmarking, community attitude and evaluation studies, image-building/communications campaigns and efficient management practices.

Prior to establishing LBG Associates in 1993, Dr. Gornitsky developed and managed strategic contributions programs for Citibank and Pfizer.

Dr. Gornitsky publishes on various aspects of corporate citizenship and has completed over 12 groundbreaking studies on subjects such as volunteerism, the environment, disaster relief and diversity. The most recent ones are on global employee engagement (2014) and the building blocks of a successful volunteer program (2012).

Dr. Gornitsky is an adjunct professor at NYU and was a faculty member at the Center for Corporate Citizenship at Boston College. She is a member of the faculty of the Points of Light Corporate Institute and is an evaluator for the Civic 50. She is a frequent speaker at conferences and organized a conference on global corporate citizenship.

Dr. Gornitsky is on the boards of Autism360 and Jewish Family Service and UJF in Stamford, CT and is president of LBG Research Institute. She was honored for her commitment to her local community in 2007.

Dr. Gornitsky earned her Ph.D. in Environmental Psychology at City University of New York. She also holds a Master of Philosophy, Master of Arts and Bachelor of Science degrees, all in psychology.

Donna Devaul, MPPM, Vice President of Research

Donna Devaul is vice president of research for LBG Associates. In this role, Ms. Devaul has conducted research for clients on all aspects of corporate community involvement, including workplace giving, employee volunteerism, corporate giving and more. She is the author of numerous research studies, including "Corporate Giving in the new Economy" and "Workplace Giving Works! Make It Work for you." In addition to her position at LBG Associates, Ms. Devaul is Executive Director of LBG Research Institute, where she is responsible for membership, marketing, research and administration.

Previously, Ms. Devaul was director of marketing for Irving Levin Associates, Inc., a privately held newsletter publisher in Norwalk, CT. There she was responsible for the marketing strategy and execution of all marketing programs, and the daily operations of the firm. Prior to joining Levin in 2001, she held marketing positions at Simba Information, a Primedia company, and Money magazine, a Time Inc. publication. Her editorial credits include managing editor of Catalog Age magazine, where she won regional and national editing awards. While at Levin, she won marketing awards from both The Newsletter on Newsletters and the Specialized Information Publishers Foundation. Ms. Devaul is a magna cum laude graduate of Hamilton College and holds a Masters in Public and Private Management from Yale University.

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Volunteer Match

Special thanks to Chris Jarvis and Angela Parker at Realized Worth for their assistance in recruiting participants and sponsors for this study.

Executive Summary

The three main challenges of going global, regardless of where home is, are:

- Managing a Global Program
- Vetting Local NGOs
- Paying Employee-Directed Grants

In addition, there are challenges that are unique to each employee engagement program. Together, these challenges affect how effectively and cost-efficiently employee engagement programs are run. Like most everything else, with an unlimited budget, all of these challenges would disappear; however, throwing money at these problems reduces the social impact, an equally important part of engagement. The key is balance the expenses of global employee engagement with the impact achieved, both for employees, the company and the community.

The companies in the study have taken different approaches to managing challenges, all with the intent of controlling the costs of these programs while still having an impact.

Challenge #1: Managing a Global Program

To manage global engagement without adding significant staff, companies use volunteers to manage engagement. Some use volunteer teams, such as giving and/or volunteer councils, while others use a single individual as the “champion” of volunteering or engagement in the greater sense. This model is already employed in many companies just to handle the domestic workload. The model usually has to be tweaked to account for the complications of distance and language, but it works quite well as a solution to staff constraints. This model is most successful when there are extensive resources made available to the volunteers, such as toolkits, templates, and the like, and frequent communication between headquarters and the volunteers and between the volunteer champions themselves.

Challenges	Solutions
Managing Across the Miles	Use Volunteers to Manage Engagement
Communicating with Volunteer Councils and Champions	In Person Team-Building Meetings
Communicating with Employees	Translate Key Materials

Challenge #2: Vetting Local NGOs

Vetting new NGOs to full equivalency, in U.S. terms, is extremely expensive. Even if a company is a member of a vetting cooperative, such as NGOssource, the bill to vet a new NGO is more than \$1,000. Although a necessity for large grants, many of the companies in the study allow NGOs to be vetted against a lower standard than full equivalency. The prevailing feeling is that for volunteer projects and small, employee-directed grants, full equivalency is not needed and not worth the cost. All NGOs have to pass through terrorist and money-laundering watch lists—no exceptions—but otherwise, companies put together their own list of documents needed to vet an NGO for a volunteer project or small grant.

Regardless of the level of vet, the hardest part of vetting a new NGO is getting information from the NGO itself. On its end, the NGO makes decisions about whether the benefit from interaction with the company is worth the time it takes to respond to requests for information as part of the vetting process. Companies typically use local employees to communicate with NGOs in order to facilitate cooperation.

Some grantmakers prefer not to get involved in vetting at all and restrict employee-directed giving to either a pre-vetted set of NGOs, domestic NGOs with international operations, or “friends-of” organizations with local tax-exempt status. A pre-vetted set of NGOs is sometimes also used for volunteer projects, as well as grants.

Challenges	Solutions
Vetting to Full Equivalency	Lower the Bar
Getting Information from the NGOs	Engage Local Employees
	Avoid Direct Grants
	Join Collaborative Vetting Partnerships
	Create an NGO Document Database

Challenge #3: Paying Employee-Directed Grants

Employee-directed grants tend to be small, so the cost of paying the grant can be a large percentage of it. Sometimes the cost is borne by the NGO, but more likely the company is absorbing the cost of payment. Electronic funds transfers should make the payment process easy, but if the NGO is reluctant to disclose its banking information, the grantmaker or its vendor has to resort to a check or bank draft.

Except for the financial institutions in the study, most of the participants use a third-party vendor to manage employee-directed giving. The market for these services is changing rapidly as vendors build partnerships with different organizations overseas to increase their capabilities. Therefore, the cost structure for paying small grants is vendor-specific. Controlling costs is a matter of working with the vendor to understand its partner relationships, and evaluating the advantages and disadvantages of different vendors.

Challenges	Solutions
Controlling Costs	Carefully Consider the Options
Getting Banking Information from NGOs	Provide Clear Communications

The Challenges of Specific Employee Engagement Programs

Companies use volunteerism and employee-directed giving programs as engagement tactics. Volunteerism includes traditional volunteer projects, such as paint-and-fix and environmental projects, as well as more skills-based activities. Employee-directed giving includes workplace giving, Matching Gifts, Dollars for Doers/volunteer grants, and disaster relief giving. Employee fundraising, in which employees raise money for a particular charity, is a hybrid of volunteerism and employee giving.

The key to success of any of these programs is usually measured in participation— participation rates, number of participants, number of hours or dollars—however it is measured. Getting participation is the overarching challenge for all of these, with the obstacles shifting depending on the customs and norms of the employees at the target location.

Volunteerism Challenges

Employee openness to volunteerism, for example, depends on a number of factors, including the cultural norms of the country and the culture of volunteerism within the company. Employees in countries in which volunteering is uncommon may be resistant to the idea of volunteering either during the workday or on personal time. This could be magnified if the company itself does not have a service culture, even in the home country. It is likely, though, that the volunteer champion is enthusiastic and able to educate employees and gain acceptance over time.

Gaining this acceptance takes a combination of effort from the local volunteer managers and well as headquarters staff. While headquarters can provide a unifying theme that captures employee interest in volunteering, the local staff can take that theme and adapt it to specific NGOs and projects that appeal to employees and address a community need.

Volunteerism Challenges

Getting Participation

Finding Appropriate NGOs

Solutions

Harness Existing Enthusiasm

Design Programs Locally

Use Brands and Themes to Rally the Troops

Engage Local Employees

Use Existing Grant Partners

Tap Third Parties

Ask Affinity Groups

Educate Volunteer Champions and NGOs

Employee-Directed Giving Challenges

Getting participation in employee-directed giving programs can be challenging even at home. Overseas, sometimes the program policies have to be tweaked to be appealing to different employee populations.

Workplace giving programs commonly include payroll deduction as the primary giving vehicle. Payroll deduction may not be familiar to employees in some countries or available through a reliable vendor, so the program might need to be more credit-card or check based. Workplace giving is also sometimes part of a “charity of the year” program in some countries, a scheme that could be unfamiliar to the home country but essential to success locally.

Workplace Giving Challenge

Payroll Deduction

Solutions

Use Multiple Vendors

Build It Yourself

While programs like Matching Gifts and disaster relief are likely well-understood by employees across the globe and need little tweaking, volunteer grants or **Dollars for Doers** programs might be completely new to local employees, particularly in places where personal volunteering is uncommon. Companies that want to expand Dollars for Doers need to work particularly hard at explaining what the program is and what the value is to the employee. It also helps to provide resources, such as Volunteer Match, to help employees find a place to volunteer.

Dollars for Doers Challenge

Getting Participation

Solutions

Creative Communications

Make It Easier to Volunteer

Matching Gifts are a popular program in many countries, and it is very common that any federally recognized charity be eligible for a match. This is because Matching Gifts are frequently promoted as a way for a company to support its employees' personal philanthropic passions. In countries where there is a reliable database of tax-exempt NGOs, having such a generous match policy doesn't pose much of a problem. In countries without federal databases, vetting a new NGO for a small matching grant can be cost-prohibitive. Instead, companies will limit the organizations eligible for a match, such as restricting it to existing grantees or other pre-vetted NGOs.

Matching Gifts Challenge

Controlling the Scope

Solution

Restrict the NGOs Eligible for a Match

Disaster relief is a proactive employee engagement tactic, usually consisting of opening or extending a company's matching gifts program for matches to disaster relief organizations. Sometimes companies have partnerships in which they mobilize volunteers or product donations for disaster response, as well. The challenge, once it is decided if the company will respond, is getting the response underway. Because of this difficulty, some companies have shifted to a proactive program, focusing on disaster preparedness.

Disaster Relief Challenge	Solution
Launching the Response	Focus on Disaster Preparedness

Conclusion

Multinational companies have been successfully using the “adopt and adapt” approach to global employee engagement to spread their programs across multiple locations. In the process, they have learned to minimize or overcome a number of challenges that have threatened to make going global cost-prohibitive.

Finding great local leaders and advocates is critically important to the success of global engagement. Whether the solution is an executive champion or a volunteer council, the local employees know best what community issues are the most pressing and how employees will react to being asked to help.

The citizenship staff at headquarters can provide the focus for the program and the tools the volunteers need while the local engagement champions take those guidelines and create a program that will appeal to employees. The staff can also handle some of the larger challenges, such as deciding how to vet and pay NGOs.

Good all-around communication is also important. Effective communication paves the way for clear understanding among all parties: from headquarters to the local team, from the company to the NGOs, from the citizenship staff and volunteers to the employees they are trying to reach. Sometimes that means translating key documents in order to ensure comprehension, particularly when talking to NGOs. It is another way to “adopt and adapt” for success.

While a decade ago companies may have been wondering if the effort to go global would be worthwhile, today's companies say unequivocally “yes.” Even with the challenges that go with expanding employee engagement, the companies interviewed said they would not go back. All programs require adjustments—trimming the less successful and testing new programs— but when a company is doing business globally, it tries to treat employees equally, offering them as many of the engagement opportunities as desirable and feasible. It's part of being a global socially responsible company.

LBG Associates Publications

To order, visit our website at www.lbg-associates.com or call 203-325-3154

Building Blocks of an Inspired Employee Volunteer Program

In this series of three white papers, LBG Associates explores three crucial building blocks--the three "R"s--of an employee volunteer program:

- Recruiting
- Recognition
- Reporting

We surveyed 47 major U.S. companies to find out what is working in each of these areas TODAY. These white papers will show you how to build (or renovate) your EVP for maximum success. Together they will answer these crucial questions:

- What is the most effective way to get employees to volunteer for the FIRST TIME?
- What makes them want to volunteer again?
- What recognition tactics really get employees excited about volunteering?
- What incentives increase reporting volunteer hours the most?
- How should I structure my Dollars for Doers program for maximum success?

Secrets to Creating High-Impact Strategic Partnerships

LBG Associates defines a strategic partnership as a mutually beneficial relationship and investment of resources between a nonprofit and a company that results in a community involvement program that aligned with the company's corporate citizenship strategy, brand, and business goals.

Is having a strategic partnership for you? The answer is most likely YES. Even with limited resources, CI professionals can produce programs that make positive changes in the community and build business value.

This report lays out LBG Associates' recommendations for building a strategic partnerships, outlines the key steps to follow, and provides best practices to enhance success. The report includes 24 case studies of successful partnerships with insight from both the corporations and their nonprofit partners. Learn from IBM, Moody's, American Express, AMD, Seventh Generation, Verizon, Western Union, Merck and 16 others about the challenges they faced and how they overcame them.

There is no other report that can guide you through the process. The report includes the 13 Steps to Success and a checklist to guide you on the journey and help avoid missteps and mistakes.

Motivating Volunteering in Tough Times

In these tighter times, many companies are viewing employee volunteerism as a cost-effective way to continue to make an impact in their communities. But what is motivating employees to volunteer right now? If you don't know, or haven't checked in with your employees to find out, you may have some surprises in store.

We understand that there's an urgent need to help companies make crucial decisions about ways to bring their volunteer programs more in line with today's economic realities-- and employees' needs and desires. This NEW research study from LBG Associates and LBG Research Institute is designed to provide you with that help, by answering the following questions:

Are employees more driven to volunteer during this recession, or are they so depressed that they are in a state of inertia?

Are employees afraid to use workday-based programs, such as skills-based, pro bono, or paid time off, for fear of losing/jeopardizing their jobs?

Just what is inspiring employees to volunteer during these challenging economic times? LBG's new research report is unique in that it includes both the voice of the employee volunteer manager AND the employee. By comparing research from both groups, this study provides a much-needed and robust view of today's volunteering landscape.

The Green Effect: How Community Involvement Is Embracing Environmentalism

LBG Associates' new research report, *The Green Effect: How Community Involvement Is Embracing Environmentalism*, reveals the top environmental trends and practices among 51 of today's leading corporations—and includes a unique self-diagnostic tool that helps determine if a company is a Peridot (becoming green); a Jade (green in many business and community involvement practices); or an Emerald (extremely green). It also includes eyeopening findings on perceptions of for-profit/nonprofit partnerships, based on in-depth discussions with nine green NGOs.

This new report presents a wide range of research findings from the participating companies, addressing topics such as:

- Whether respondents believe being green is part of their corporate culture;
- What metrics are being used to measure companies' environmental footprints;
- How product design and manufacture have been greened;
- How environmental practices vary among the Peridot, Jade, and Emerald companies;
- How charitable giving is affected by the green movement;
- Median green giving levels;
- The critical role employees play in promoting environmentalism;
- How companies are communicating their environmental activities.

The Green Effect also includes more than 25 case studies showing how research participants are “walking the talk” and executing their environmental commitments—in both operations and community involvement activities. With its landmark research findings, case studies, and proprietary self-diagnostic tool, *The Green Effect: How Community Involvement Is Embracing Environmentalism* is a muchneeded, one-of-a-kind resource guide for the next step in community involvement: going green.

Trends & Best Practices in Corporate Community Involvement

Trends & Best Practices in Corporate Community Involvement presents the extensive findings of a comprehensive survey of the community involvement programs of 35 major U.S. corporations. Originally designed to update LBG Associates' 1998 *Best Practices in Corporate Community Relations* report, this landmark community involvement study goes well beyond the 1998 report, and is unprecedented in its scope, detail, and analysis.

The report examines the following topics in detail:

- The business case for corporate citizenship;
- Structure and governance of the CI department and the foundation;
- Charitable giving program types and budgets;
- Employee-directed giving;
- Employee volunteerism;
- Sponsorships, memberships, and signature programs;
- Disaster relief;
- Measurement and evaluation; and
- Communication.

Each section of this report comprises three sections:

- **Overview:** Provides a broad look at the topic and information about the section's contents.
- **Survey Results:** Details the statistical findings derived from the responses to the survey questions for each topic area, including numerous charts and tables that can be easily used for benchmarking a company in very specific community involvement areas.
- **Trends & Best Practices:** Highlights the significant trends revealed by the survey participants' responses, plus provides recommended best practices.

With its 130-plus pages of benchmarking data, trend analysis, and best practice guidelines, this report is more than a reflection of the state of community relations: It is a tool for companies looking to gauge their CI performance, and a reference that can help elevate community involvement/community relations activities to an even higher level.

Global Community Involvement

As Corporate America becomes more international in scope and the focus on philanthropy and corporate citizenship grows, many companies are seeking assistance in developing a global community involvement program or enhancing/modifying their U.S. program for expansion overseas. This research report is designed to provide that assistance.

Global Community Involvement examines the global CI practices of more than 20 U.S. multinationals (MNCs), 40 of their overseas locations in 15 countries, and the practices of foreign companies. The study covers a number of community involvement areas and includes details on:

- The business case for community involvement;
- CI department structure;
- Charitable giving;
- Employee volunteerism;
- Sponsorships and signature programs;
- Disaster relief;
- Measurement and evaluation; and
- Communication.

In addition, more than 20 pages are devoted to detailing the current tax legislation and the philanthropic and volunteer activities in a number of countries--including Australia, China, India, Poland, and many others.

Global Community Involvement is an invaluable resource for anyone interested in building or sustaining a global CI program. The findings of this study have resulted in the development of a best-in-class paradigm for global giving that will help companies deal with the complex challenges involved in developing a global CI program. (140 pages)

Measuring Corporate Volunteerism

Measuring Corporate Volunteerism helps companies determine and improve the success of their corporate volunteer programs by highlighting the issues they need to focus on most. Specifically, this study:

- Explains how CR/volunteer managers and senior executives define success and how they evaluate the success of their programs;
- Outlines the "key components" necessary to build and maintain a successful corporate volunteer program;
- Explores the intricacies of many of those "key components" and highlights what, specifically, about each contributes to the success of volunteer programs;
- Identifies the value and benefits of corporate volunteerism, from the perspectives of CR/volunteer managers, senior executives and the nonprofit community;
- Ultimately, Measuring Corporate Volunteerism identifies those variables or factors that are most likely to impact and predict the success of corporate volunteer programs.

The study will prove to be a significant benefit to community relations, public affairs and human resource professionals, as well as volunteer council/committee members, volunteer "champions" and coordinators. (182 pages)

The Standards of Excellence for Corporate Volunteer Programs

The Standards of Excellence for Corporate Volunteer Programs. The Standards are the result of over four years of intense research and have been compiled with input from hundreds of community relations professionals, corporate senior executives and non-profit leaders. Comprehensive, yet flexible, The Standards serve as a framework that enable companies to build highly successful volunteer programs; programs which achieve a high level of employee participation and generate specific benefits for companies, their employees and the communities in which they live and work.

The Self-Diagnostic Tool ("The Tool") allows community relations managers to evaluate their programs against The Standards.

Free Publications

To request a free publication, visit our website or call 203-325-3154.

Corporate Pro Bono Readiness

Wondering if your company is ready to start a pro bono program? The Nonprofit Collaborative, composed of Taproot Foundation, Common Impact, and Points of Light, asked LBG Associates to conduct a survey to assess corporate readiness for pro bono services with the intent to increase the effectiveness of these initiatives. This free report will help you evaluate whether it is time to begin a formal pro bono program and what you need to be successful in that endeavor.

Pro Bono Service: The Business Case

New research commissioned by Capital One in partnership with the Taproot Foundation and conducted by LBG Associates reveals a solid business case for pro bono service, presenting evidence of the benefits that pro bono service programs bring to companies, their employees, and nonprofits. The highlights of the findings among employees, their managers, and senior executives are presented in this FREE document.

Employee Engagement: Volunteerism

How are companies using volunteerism to engage employees? LBG Associates conducted a focus group on this topic at the Charities@Work conference in April 2012. This FREE white paper summarizes the findings and gives insight into the tactics that are getting employees out and volunteering.

Employee Engagement: Workplace & Corporate Giving

How do companies use workplace and corporate giving to engage their employees? LBG Associates conducted a focus group on this topic at the Charities@Work conference in April 2012. This FREE white paper summarizes the findings and gives insight into what is popular and successful right now.

Issue Briefing Disaster Relief

To help prepare your company for the full scope of disaster relief, LBG Associates has prepared this FREE issue briefing that provides an overview of disaster management and relief; discusses trends that we've found from our research during the past 15 years; and outlines our guidelines for disaster relief best practices.

To request a free publication, visit our website or call 203-325-3154.

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