

## The PricewaterhouseCoopers Canada Foundation Volunteer Continuum



## About PricewaterhouseCoopers

PricewaterhouseCoopers Canada (“PwC” or “the firm”) has close to 500 partners and 5,000 staff in locations from St. John's, Newfoundland and Labrador, to Vancouver, British Columbia. Now celebrating more than 100 years of excellence in Canada, PwC provides industry-focused assurance, consulting and tax services for public, private and government clients. As part of a larger network of over 163,000 people in 151 countries, PwC works to provide clients with the best of its collective thinking, experience and solutions to build public trust and enhance value for clients and their stakeholders.

## Our approach to Corporate Responsibility

At PwC, Corporate Responsibility (“CR”) represents the way we integrate social, environmental and economic concerns into our values, culture, decision-making and operations in an accountable and transparent manner. In 2009, PwC created a comprehensive CR strategy and we intend to lead our industry in integrating CR into all aspects of what we do – ranging from working with our local communities, minimizing our environmental impact, developing our people to their full potential, contributing to sound public policy and providing advice to our clients on their sustainability strategies.

Our firm approaches CR from four dimensions:

- **Community** – PwC is committed to making a positive, lasting impact in our communities by sharing our time, knowledge and resources as well as inspiring and harnessing the dedication and capabilities of our people.
- **Environment** – PwC is committed to respecting the environment by raising awareness of the footprint we are leaving on the planet and taking measurable steps to reduce the environmental impact of our business operations.
- **People** – PwC is committed to investing in our people by providing a range of opportunities to support them in reaching both their personal and professional goals. We are focused on developing responsible leaders who can build trust-based relationships with each other and with our clients and stakeholders.
- **Marketplace** – PwC is committed to responsible business practices and promoting responsible corporate citizenship. Whether with clients, vendors or other organizations, we promote sustainable practices and good governance.

## The PricewaterhouseCoopers Canada Foundation

The PricewaterhouseCoopers Canada Foundation (the “Foundation”) was created in 2004 to help enhance and expand on the firm’s philanthropic activities. The mission of the Foundation is to make a positive, lasting change in our communities through the sharing of our time, expertise and resources. The Foundation focuses its efforts on the following three strategic priorities:

- **Community:** making a significant difference in communities across Canada by integrating our community programs (cash, in-kind and volunteer) and by empowering and enhancing the commitment and effectiveness of our volunteers. Our objective is to facilitate the transfer of expertise between our people, the Foundation, the firm and community partners in an effort to build capacity in the charitable sector.

- **PwC People:** developing responsible leaders who can build trust-based relationships with each other and with our clients and stakeholders. Our goal is to share knowledge, skills, experience and networks through our people's participation in the Foundation's programs.
- **The PwC Firm:** adding value to PwC's business through our people's personal and professional development and enhancing the firm's reputation amongst key stakeholder groups in support of the broader business strategy.

The Foundation operates under a framework called the *PricewaterhouseCoopers Canada Foundation Volunteer Continuum* (the "Continuum"), which will be examined within this document, and includes the Foundation's core programs: Team Volunteering, Volunteer Grants, Volunteer Recognition, Leadership Grants, Volunteer Education and Engagement, the Foundation Champion Network.

## The Volunteer Continuum—A Framework for helping to develop committed and effective volunteerism

The Continuum in **Figure 1** was created in collaboration with stakeholders in the charitable sector and PwC's leadership team to act as a decision making framework to help guide the firm's community initiatives and help maintain focus on the important role the Foundation has in engaging, enlightening, enabling and empowering PwC's people for maximum community benefit.

At the highest level, the Continuum is a tool that helps with developing, monitoring, evaluating and revising the Foundation's strategy and programs. It helps to ensure any community support or volunteer experience is designed in a way that maximizes a person's level of commitment to the charitable sector and the effectiveness of their volunteer contributions.

The Continuum can be re-purposed by any individual or organization to assist with looking at the relationship between personal or business development and community program design and impact. At PwC, it helps to ensure anyone involved in the Foundation's activities is participating in an experience that is sustainable and strategic, highlighting how someone can move from being a novice philanthropist having simple program awareness to a strategic philanthropist who is using their skills, expertise and resources in new and innovative ways. An illustration of how the Foundation has used the Continuum in this manner can be found in the Program Design Matrix in **Table 1**.

Other goals of the Continuum include highlighting how developing partnerships with the charitable sector can help encourage, enlighten and empower others to be thoughtful about their financial investments in the community and, in particular, help guide individual community contributions.

## Explanation of the Foundation's programs and their role within the Volunteer Continuum

A summary of each of the Foundation's programs and its relationship to the Continuum is provided below. Each program has been developed with a view to filling a particular niche within the Continuum as highlighted in **Figure 1** and **Table 1**. The Foundation's programs are open to all employees and everyone is encouraged to participate in any program that interests them. All Foundation programs have been developed with the support of a range of community experts. These people have given generously of their time to assist the Foundation in developing a strategy and programs that align with and reflect our goals and the needs and capacity of our community partners.

Programs are assessed based on how they help augment a person's *commitment* to the charitable sector and the *effectiveness* of their volunteer contributions. Our programs and their impacts are highlighted below.

***Team Volunteering and Foundation Day (Commitment)***—an entry point for those new to volunteering; facilitates and encourages initial engagement in volunteerism and an introduction to charitable causes and organizations for potential ongoing volunteer participation

- Volunteerism is a core component of the Foundation's programs and activities. Team Volunteering, the most visible of the programs, engages teams of our people in meaningful day-long projects with charities across Canada. PwC staff are entitled to one paid day out of the office to participate in a Team Volunteering activity each year. This program also allows employees to expand and deepen their relationships within the firm; enhance and exhibit their leadership skills; and enables junior staff members to serve in leadership roles with teammates at all levels within the firm. Employees can enter the Continuum through simple program awareness, participation in basic experiences (hands/hearts) or through deepening their commitment by using their skills and knowledge in new ways to help solve complex organizational problems. Employees are encouraged to use their experience to enhance their personal development and to continue to volunteer on an ongoing basis.
- The Team Volunteering program has been designed to help meet the operational needs of charitable partners, helping to build capacity through the provision and transfer of skilled expertise, the provision of a small operating grant to help defray the costs of the volunteer activity, and a toolkit to help support the development and implementation of effective episodic volunteer activities. Activities are designed to provide short-term and long-term benefit to the charity, the volunteers and the firm.
- Foundation Day is an annual one day celebration event occurring in July of each year that showcases the Foundation's activities and how employees are making a difference in their communities. Employees are invited to participate in presentations and to sign up for local volunteer events.

***Volunteer Grants (Commitment)***—recognizing the achievements of employee volunteers and thereby encouraging deeper and more sustained commitment

- Through this program, grants of \$300 are awarded to an employee volunteer's charity of choice in recognition and support of the employee giving at least 50 hours of volunteer service in a fiscal year of their personal time to no more than two charitable organizations. Employees who volunteer with two charities must choose the one to receive the grant.

***Volunteer Recognition (Commitment)***—at the local and national levels— volunteer recognition that supports and encourages a deeper and more strategic level of commitment by empowering candidates to act as ambassadors and role models for others

- Employees who have been awarded a Volunteer Grant during the fiscal year together with other nominees become candidates within their local offices for a Volunteer of the Year Award. A local office employee panel reviews nominees and selects one office winner. Candidates and winners are recognized and celebrated through a local office award ceremony, in newsletters, and through stories posted on the firm's intranet. A \$1,000 grant is donated to each of the winners' charities of choice. In addition, winners are often recognized by their charity and in local media.
- Each local winner is then entered into a national pool of candidates. A national selection committee comprised of employee representatives from offices across the country and external leaders from the charitable community help choose the National Volunteer of the Year. A national ceremony is held each year in celebration of our people's commitment to volunteerism and the winning candidate's commitment to being sustained, strategic and effective in their efforts. A representative of the winning candidate's charity is invited to speak at the event and is awarded a \$10,000 grant in recognition of the National Volunteer of the Year.

- Employees can participate in the Volunteer Recognition Program by applying for a grant, participating on a selection panel, and/or assisting with the broader communication and promotion of the program.
- Selection panels are provided with a toolkit and support enabling them to learn more about the charitable sector and effective volunteering and grant-making.

***Spotlight on Volunteering (Commitment and Effectiveness)***—*sharing our people's stories to encourage others to volunteer and to deepen their commitment and effectiveness*

- Through the PwC intranet and internal publications, the Foundation shares stories about employee volunteers, highlighting community issues and the ways our people have used internal volunteer programs to help deepen their commitment and effectiveness within the charitable community. Our people are encouraged to become story tellers at team meetings and share their experience about volunteering and the impact it has had both personally and the community. The ultimate objective is to continue to help raise awareness and to motivate others to get involved.

***Leadership Grants (Effectiveness)***—*encourages and supports deeper engagement of people through their participation in the grant making process and supports an underfunded niche within the charitable sector*

- The Leadership Grants Program provides financial grants for staff or volunteers at small to medium sized Canadian registered charities that have operating budgets under \$1 million and are looking for donations to fund professional development opportunities. The program focuses on providing support to a segment of the sector which is particularly challenged to obtain unrestricted operating funds. Grants range from \$2,500 for individuals to \$5,000 for teams.
- The program has been designed in a way that gives charities the flexibility to take advantage of a development opportunity that applicants identify as best meeting their needs. Examples range from formal courses, conferences or training programs to informal learning experiences of the applicant's own design that help to advance the applicant's professional and their organization's goals. Successful applicants provide feedback to help the Foundation assess and understand the effectiveness of the program and identify opportunities for improvement.
- Our people are encouraged to participate in a variety of ways, from providing assistance with identifying potential applicant charities, to joining internal committees that help determine grant recipients. The Foundation's toolkit for effective grant-making is used as a guidebook. This approach helps support the continuous development of our people, raise awareness about the program and recognize its impact.

***Volunteer Education and Engagement (Effectiveness)***—*includes online tools and in-person educational sessions designed to encourage and support effective engagement all along the volunteer continuum, particularly on boards and board committees*

- The Foundation has created tools and workshops specifically designed to educate our people about the needs that exist in their communities and the organizations that are searching for volunteers. Employees can access these resources on-line or through attending live sessions. The following courses are included in this program:
  - **Volunteering 101:** developing an understanding of volunteer experiences—what is available and how to find the opportunity that is right for you.
  - **Board Basics:** providing the basic information a charitable director needs to know to be effective in their role. This course is targeted to those who are relatively new board members or are interested in taking on a board or committee role.

- **Governance as Leadership:** facilitating conversations based on the best-selling book by Chait, Ryan & Taylor, this seminar focuses on sharing best practices in board governance with input from noted consultants and authors.
- **Board Treasurer Program:** training to assist PwC employees in applying their expertise to board treasurer and finance and audit committee roles (launching in 2011).
- **Lunch and Learn Sessions:** Our people are invited to attend lunch and learn sessions focused on providing education around issues faced by the charitable sector. Employees are encouraged to suggest new topics or presenters and identify new learning opportunities using knowledge gained through their own networks. As our people's levels of commitment and effectiveness increase, they have the opportunity to deliver lunch and learn sessions themselves or in partnership with colleagues or charitable sector representatives. They are encouraged to share their own experiences to further encourage and support others to get involved in the charitable sector.

***Foundation Champions (Commitment and Effectiveness)***—engaging our people as local office ambassadors and in strategy and program development, implementation, monitoring and modification

- PwC has developed a network of Foundation Champions working in all offices across the country. Champions help identify opportunities for program development; communicate Foundation activities in a locally relevant way both internally and externally; understand local office dynamics and assist with employee engagement; and work with the Foundation's management team around training and development opportunities. Champions are provided with terms of reference for the role, a toolkit to help understand the requirements, and the opportunity to decide on the ways they would like to tailor their experience based on their individual workload, availability, skills, and interests. All Foundation Champions are encouraged to enter the role into their PwC Performance Coaching & Development plans for consideration as part of annual performance reviews and compensation discussions.

***PricewaterhouseCoopers Canada Foundation Advisory Board and Board of Directors (Commitment and Effectiveness)***—

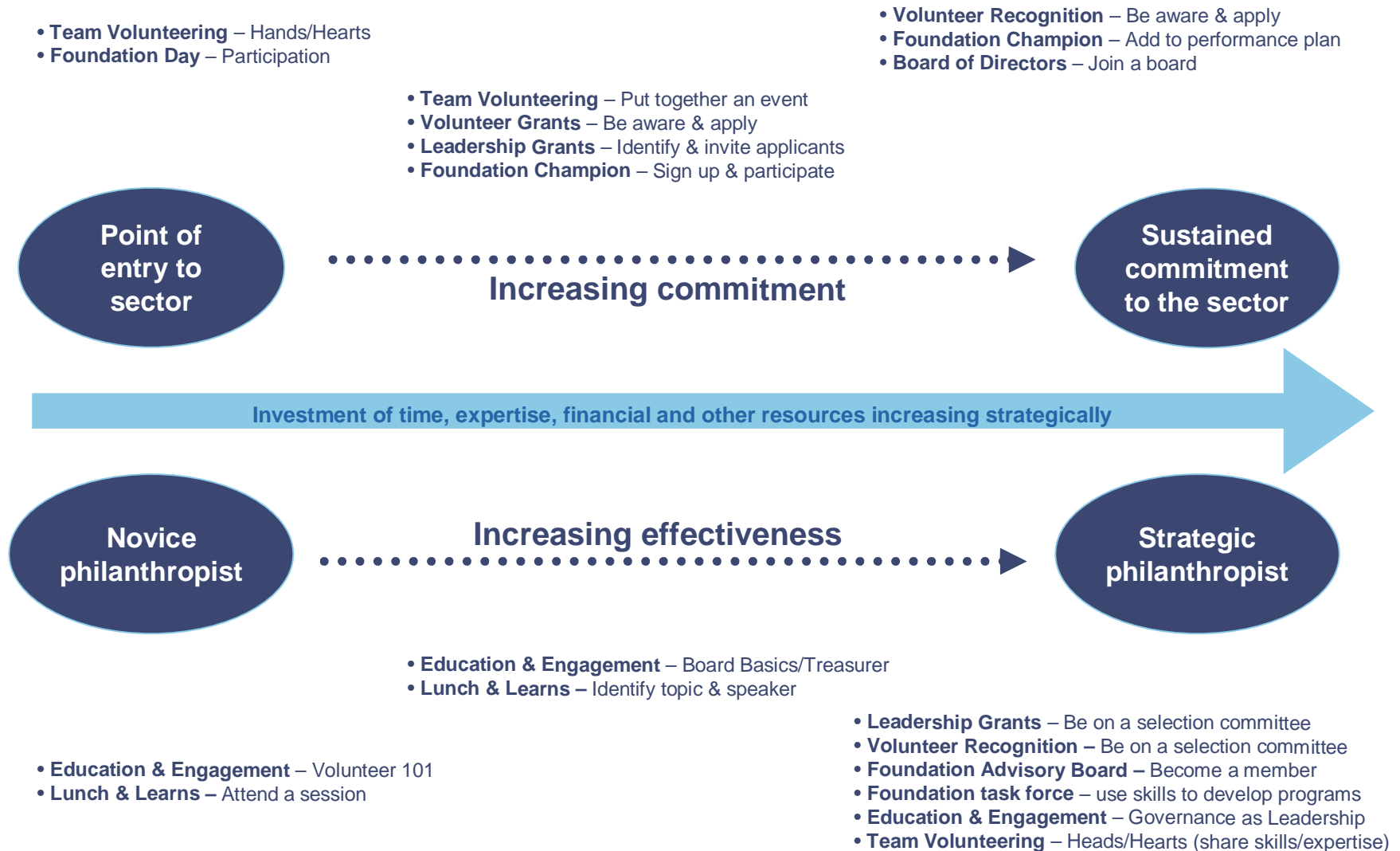
*empowering senior leadership to develop board governance skills and think strategically about the future of the Foundation's initiatives and directions*

- The Foundation is supported by an Advisory Board comprised of 10-12 of the firm's partners and senior employees. Advisory board members represent the diverse geographic, demographic, skills and perspectives of the firm's workforce. Serving for a rotational term, each member has fiduciary, strategic and generative responsibilities as part of their role and wears a "hat" for one of the Foundation's programs where they can add more specialized advice and expertise. Advisory board members also lead and/or participate in task forces from time to time to help develop Foundation programs in collaboration with other firm employees.

## Results and Impacts

The *PricewaterhouseCoopers Canada Foundation Volunteer Continuum* has assisted the Foundation in developing and delivering a strong suite of programs since its launch in 2004, increasing our people's overall engagement rate in Foundation activities from 26% to 45%. The Foundation has been able to increase its number of corporate volunteer events from 160 during its first year of operation to over 300 in fiscal year 2010, maintaining an employee volunteer satisfaction rating (excellent or exceptional experience) of 95%. Quantitative and qualitative data has also been collected to help measure how effective the Continuum has been in helping our people increase their commitment to the charitable sector and the effectiveness of their volunteer contributions. Hundreds of stories and testimonials from our people and charitable partners have been collected, providing further evidence that PwC's approach to community engagement and the Continuum are helping to strengthen not-for-profit sector organizational capacity and volunteer engagement across the country.

Figure 1: The PricewaterhouseCoopers Canada Foundation Volunteer Continuum





**Table 1: Program Design Matrix — Measuring Effectiveness and Commitment**

<i>Commitment and/or Effectiveness are Increasing and More Strategic</i>								
		Team Volunteering & Foundation Day (Commitment)	Volunteer Grants (Commitment)	Volunteer Recognition (Commitment)	Leadership Grants (Effectiveness)	Volunteer Education & Engagement (Effectiveness)	Foundation Champions (Commitment/Effectiveness)	Foundation Advisory Board (Commitment/Effectiveness)
<i>Commitment and/or Effectiveness are Increasing and More Strategic</i>	<b>Novice Philanthropist</b> Not involved, minimally or sporadically involved; involvement driven by external forces such as friends or colleagues, loose connection to the charity)	Hands and Hearts – basic introduction to Volunteering & Learning  Participating in Foundation Day activities	Program awareness	Program awareness	Program Awareness	Volunteer 101 – Learning the basics of the volunteer experience  Lunch and Learns – simply attend and learn	Program awareness	Program awareness
		Providing skills and expertise  Helping to put together and lead Team Volunteering and Foundation Day activities	Active volunteering + application for a Volunteer Grant	Self-education about volunteer recognition program and fundamentals surrounding what makes a great experience + applying for or Nominating someone for an award – taking action	Inviting applications from charities who might benefit from the program	Board Basics – attend basic charitable director information seminar to increase effectiveness  Lunch and Learns – identifying topics and speakers for lunch and learn and attend sessions in local offices	Commitment to the Champion leadership role & participation in calls & experiences	Commitment to serving as a member on the Foundation Advisory Board and integration of the role into the Performance Coaching & Development Plan
	<b>Strategic Philanthropist</b> Deeply involved in the community through sustained, strategic and effective investment and leveraging of a range of resources including time, expertise, financial, networks and other resources	Transforming volunteer experiences into positions on Boards of Directors, connecting charities to resources, building capacity in strategic ways	Active volunteering + application for Volunteer Grants + personal financial contribution (recommended)	Participation in Volunteer Recognition selection panels	Participation in Leadership Grants selection panels	Board Treasurer (in development) – attend specialized information sessions on board treasurer and finance committee roles  Governance as Leadership – attend new paradigms in charitable directorship/leadership sessions  Join a charitable board	Full integration of the Champion role into the Performance Coaching & Development Plan; proactive partnership development and capacity building opportunities within the charitable sector	Ongoing participation and generative approach to board governance  Join a task force to innovate the Foundation programs

[www.pwc.com/ca](http://www.pwc.com/ca)