



Corporate Volunteerism and Service Toolkit



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Building Stronger Communities Through Corporate Volunteerism:

A New Toolkit for Indiana Employers

Serve Indiana, the state service commission and division of the Indiana Department of Workforce Development, is excited to share this Corporate Volunteerism Toolkit to help businesses turn good intentions into impactful community action. Designed for employers of all sizes, the toolkit offers a strategic roadmap for developing meaningful volunteer programs that align with business values, foster engagement, and support nonprofit partners.

The toolkit guides employers through every step of program development – from identifying your organizational motivation and unique assets, to exploring partnerships, planning events, and evaluating long-term impact. With practical tools like asset mapping templates and potential partner checklists, companies can build volunteer programs that are thoughtful, inclusive, and sustainable. Use the resource in its entirety or focus on the sections that address your company’s particular needs.

Research shows that corporate volunteer programs help attract and retain talent, improve company culture and reduce turnover. This toolkit allows employers to build out those efforts helping meet the needs of Hoosiers and the future workforce.

At the heart of this toolkit is a message of collaboration – the most effective volunteer efforts come from authentic relationships between companies and community organizations. This is why Serve Indiana encourages businesses to look beyond traditional partnerships and engage with local, grassroots nonprofits; many of which are working on the front lines of Indiana’s most pressing challenges. By investing time, resources, and leadership in these partnerships, companies can help address critical needs while empowering employees to serve with purpose and gain valuable skills.

The goal of this toolkit is to make volunteer programs more strategic, and more accessible for Indiana businesses. Serve Indiana believes when companies and communities collaborate with intention, the results are transformative for all involved!

Section 1: Aligning Service with Company Values

Key Takeaways:

- Understand your motivations
- Source internal perspectives
- Know what you bring to the table

Programs built strategically and grounded in a shared sense of purpose are likely to be the most successful. Understanding your company's motivations for community engagement, as well as the assets you bring to the table, will help you identify the partnerships and activities that will be the best fit.

Understand Your Motivations

The number one goal of most corporate volunteer initiatives is to “do good.” Authentic and thoughtful business engagement in the community has the potential to make a real impact.

- Beyond community impact, business volunteer programs can have other advantages that are important to acknowledge and consider. Understanding the ways in which your company benefits from volunteerism can help identify partnerships that bring value to all sides. Reciprocal partnerships are more likely to endure if they are strategic and meet both company and community needs.

Some additional reasons companies engage in volunteerism include:

- To build or enhance company brand and consumer opinion
- To attract job seekers
- To retain staff and increase employee engagement with opportunities to network internally while building a sense of team and giving back
- To develop their employees' leadership and professional skills
- To create networks and relationships in the community
- To deepen and broaden the impact of philanthropic dollars

Beyond strengthening your community, your top motivations for promoting employee volunteerism will guide you in building the best volunteer program and partnerships for your company and your employees.

Source Internal Perspectives

Once you understand your company's motivations, it's time to align internally on other internal drivers and parameters that will influence your choices of where to focus your volunteer initiatives and partnerships.

Your company's vision, mission, and values:

- What are your company's vision, mission, and values?
- How do you see your company's vision, mission, and values connecting with your employee volunteer program? If you don't know, survey leadership and employees to understand which of these elements of your company they would like to see brought to life in your community.

Company culture:

- How will your company culture inform your partnership choices and your messaging around volunteerism?
- How will leadership heavily influence decisions or will employees expect to have a voice and help shape initiatives?
- Do your employees prefer to work independently or in teams? What will resonate and gain support internally?

Your employees:

- What do you already know about your employees' interests, schedules, preferences, and limitations that can inform your choice of volunteer activities and/or partners? If you don't know, survey your employees to learn more.

Internal stakeholders:

- What insights could internal stakeholders like your Government Affairs, Public Relations, and Human Resources teams provide? Tap into them to confirm priority issues and geographies for the company or existing partnerships that you may be able to leverage.

Parameters/practical considerations:

- What funding is available?
- How much capacity does your team have to manage this?
- Are there specific timelines or target dates you're aiming for?
- What are the capacity and interests of employee volunteers?

Know What You Bring to The Table

Every company has unique assets and resources to share with the community. Understanding what sets your company apart and what you are uniquely positioned to bring to a partnership or initiative will help maximize your company's community impact.

Before you meet with a potential partner, know all you have to offer so you can have a productive first conversation.

Tool: Asset Mapping (Template)

Company Name: _____

Being able to articulate your company’s approach, the unique assets you bring to the table, and what you’re looking for in a potential partner is important when embarking on finding a community partner. Use this tool to reflect and then start crafting your ask(s) of a potential partner.

<p>Our primary goals for volunteerism are:</p>	
<p>What are our core competencies?</p> <p>What unique goods or services that could help meet community needs are we uniquely positioned to offer?</p>	
<p>What skill sets do our employees have that could support a volunteer activity or partnership?</p>	
<p>Do we have access to other resources that could benefit a partner organization? Ex: audiences, networks, physical space, technology, etc.?</p>	

Tool: Asset Mapping (Sample)

Company Name: Company X-IT Firm

Being able to articulate your company’s approach, the unique assets you bring to the table, and what you’re looking for in a potential partner is important when embarking on finding a community partner. Use this tool to reflect and then start crafting your ask(s) of a potential partner.

<p>Our primary goals for volunteerism are:</p>	<ul style="list-style-type: none"> • Create meaningful service opportunities for our employees to participate in. • Leverage the professional skills of our employees to support local organizations and promote progress around critical needs in our communities.
<p>What are our core competencies?</p> <p>What unique goods or services that could help meet community needs are we uniquely positioned to offer?</p>	<ul style="list-style-type: none"> • Technical support in installing and leveraging devices and systems to improve access to data, streamline communication, and assist with automation of an organization's processes. • Global research and analysis on IT trends and strategies to maximize and sustain productivity and value for an organization.
<p>What skill sets do our employees have that could support a volunteer activity or partnership?</p>	<ul style="list-style-type: none"> • Expertise in tech-based strategies and solutions to optimize an organization's efficiency. • Knowledge of and experience with project management and executive leadership to help train heads of an organization.
<p>Do we have access to other resources that could benefit a partner organization? Ex: audiences, networks, physical space, technology, etc.?</p>	<ul style="list-style-type: none"> • Product donations (e.g. hardware/software)

Section 2: Understand The Issues Facing Your Community

Key Takeaway:

- Get informed

While there are many reasons for corporations to engage with their communities through volunteerism, the primary driver is typically the desire to be a responsible corporate citizen that supports the communities where the business operates.

Before you can determine how best to support your community, you must understand your community's key needs. What issues are impacting your community? What neighborhoods in your community need support? What resources are already in place to address those issues?

Get Informed

Define Your Community: We've made a few references in this toolkit to your company's "community," but what does community mean? It's generally defined to be a group of people linked by things like geography or common interests and goals. Take the time to determine which communities your company wishes to serve.: You can ask yourself some of the following questions to help narrow your target community:

1. If your company isn't remote, what communities reside in the neighborhood your office is located in?
2. What communities do your employees belong to?
3. What communities are underrepresented in the work that you do?

Once you've defined the community you hope to serve, you will be better situated to determine its needs and where your business can plug in.

Understand Issues: Read up on relevant news, reach out to local leaders in that space, or consider creating a focus group of organizational stakeholders to learn more about the key issues and needs your community faces. Consider global, national, and local issues that may drive community needs and consult with experts to learn more about the context, current situation, and how you might contribute.

Understand Impact: The communities and neighborhoods with the most urgent needs are often hardest hit in difficult times. Grassroots organizations that aim to meet those needs are rarely located near corporate centers and can sometimes be overlooked. To maximize the impact of your work, seek out the areas of greatest need and talk to those most impacted.

Resources to Help Get Informed

Some resources that can help connect you to the areas of greatest need in your community:

- The **Indiana Association of Volunteer Centers (IAVC)** is a group of organizations and a great place to start to connect with volunteer opportunities. They can help you find a site that fits your skills, your schedule, and your values. The IAVC's mission is to act as a unified voice to strengthen volunteer centers, volunteer programs, and to promote volunteerism statewide.
 - [Find a volunteer center near you, just click here for a list of IAVC's.](#)
- **Points of Light Foundation (POLF)** is a national network of volunteer centers. POLF sets standards for volunteer excellence, encourages volunteer leadership, and often has great resources for personal volunteer development.
 - [Points of Light Foundation & Volunteer Center National Network \(POLF\).](#)

Online Volunteer Matching Sites

- [Find a Volunteer Opportunity](#)
- [Volunteer Central Indiana](#)
- [IndyHub](#)
- [Volunteer Solutions](#)
- [Idealist.org](#)
- [generationOn](#)
- [Volunteering In Public Health](#)

Resources for Volunteers

- [Energize Inc.](#) is a website full of articles and tips for maximizing the volunteer experience. Check out helpful articles on using volunteer experience to build your resume and more.
- [VOAD](#) The National Voluntary Organizations Active in Disaster leads the VOAD movement, as a convener, thought leader, and advocate for a diverse group of organizations dedicated to serving communities throughout the disaster cycle.
- [CASA](#) The mission of the Clay County CASA Program is to provide advocacy for the best interests of the children involved in Juvenile Court proceedings, as defined by the laws of the State of Indiana. We support the development, growth, recruitment, and training of community volunteers to serve as Court Appointed Special Advocates.
- [Serve Shelby](#) Our goal is to provide those wanting to volunteer in Shelby County, Indiana the opportunity to find the perfect match for their service desires and for organizations to have an additional avenue to share their volunteer needs with the community.
- [Indiana University Indianapolis National Service Archives](#): IUI has created the National Service Archives. The collection contains documents telling the stories of civic service and volunteerism in America.

Trainings and Certifications

- [Council for Certification in Volunteer Administration \(CIAVA\)](#)
CVA certification is not a curriculum, but a credentialing program that tests a person's "knowledge in use." CIAVA has hosted a study group for individuals who apply for certification.
- [Indianapolis Neighborhood Resource Center Programs](#)
Every INRC program is rooted in the belief that the people closest to a challenge are the best positioned to lead the solution. We walk alongside residents, neighborhood groups, and partners to support bold, grassroots efforts that build connection and collective power.
 - [Indianapolis Community Building Institute](#)
 - [Neighbor Power Indy](#)

Disaster Relief

- Indiana has a vast network of organizations that come together during disaster to help the community recover. During a disaster, Serve Indiana works alongside government and community organizations such as:
 - [Federal Emergency Management Agency \(FEMA\)](#)
 - [Indiana Department of Homeland Security \(IDHS\)](#)
 - [National Voluntary Organizations Active in Disaster](#)
 - [American Red Cross](#)

How We Communicate

During a disaster, Serve Indiana communicates with the public through the use of social media sources like Facebook and Twitter. Visit our [Contact Us](#) page to learn how to connect. Individuals in need of disaster related services should contact [Connect 2 Help](#) or dial 211 on a phone.

Volunteer Resource List: Potential Partner Organizations (Non-Profit)

Section 3: Explore Potential Partners

Tools:

- Potential partner checklist
- Draft pitch/intro to a potential partner

Key Takeaways:

- Understand your priorities
- Look beyond the usual suspects
- Go outside your comfort zone
- Dive deeper with existing partners

Once you have a clear understanding of the key needs you want to address and the assets you can share, you can identify potential partner organizations that not only offer meaningful opportunities to address real needs but can also reinforce your company's brand and culture.

If you take the time to explore and find the right partners for your company, you will have a better chance to build long-term relationships which can be a benefit to both the nonprofit partner and your company. Long-term partnerships are generally more efficient and more effective than short-term or one-off partnerships because you do not need to cultivate a new partnership every time you want to activate your employees. You can have greater potential to increase a nonprofit's capacity and affect lasting change if you work together over time.

Understand Your Priorities

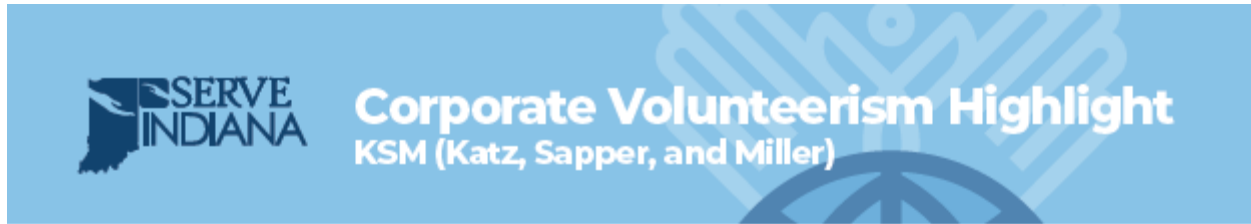
Having a clear understanding of community needs, and of your company's motivation for getting involved as well as the resources you bring to the table, are key to embarking on an effective partnership. Of equal importance is being able to articulate what your company is looking for in a potential partner. Being candid with yourself and any prospective partners on your priorities will help ensure a mutually beneficial partnership that is more likely to succeed and thrive long-term. Use the checklist below to reflect on what your company is seeking in a potential partner.

Tool: Potential Partner Checklist

Review the list below and check off the three to five items that are must-haves and the highest priority for your company. Customize the checklist by filling in any top priorities that are not already reflected. Use your custom checklist to gauge if a potential partner meets your criteria.

- Demonstrated knowledge/expertise in a particular issue area or with a specific community/neighborhood that is a priority for my company.
- Strong reputation for working with the community to meet critical needs.
- Clear needs that my company is well-positioned to help meet
- Experience implementing specific types of volunteer activities that are of interest to my company
- Leaders and points of contact that are passionate and candid about the organization’s needs, strengths, and limitations
- Goals and values that align with or complement my company’s goals and values
- Connections to communities and contacts that are of interest to my company
- Capacity to invest in a new partnership
- Willingness to collaborate and some degree of flexibility in planning
- _____
- _____
- _____

Case Study



KSM (Katz, Sapper & Miller) is an independent CPA firm that offers advisory, tax, and audit services. Founded in Indianapolis 83 years ago, KSM has grown to one of the top 50 largest CPA firms, serving clients all over the United States. KSM helps businesses in all stages of development across multiple industries. Its mission and values focus heavily on impacting not only clients, but also the communities in which its employees live and work, by investing time, talents, and resources. Learn more about KSM's [community engagement](#).

48 Hours of Paid Volunteer Time Off

KSM employees receive 48 hours of paid volunteer time every calendar year. It's up to each employee to determine how much time they spend and where they use it.

89% of Employees Engaged

In 2024, 89% of KSM employees participated in Community Day at KSM, a day when the firm closes its offices and encourages all its employees to serve in their communities. Employees completed projects at more than 100 sites across the U.S.

Up to \$1,000 Given to Organizations Where KSM Employees Volunteer

KSM donates \$500 to an organization once an employee has volunteered for 24 hours in a year. If the employee volunteers 48-plus hours, KSM will donate an additional \$500.

Community Partnerships Created With Clients

KSM partners with multiple not-for-profits and stays connected to the community via not-for-profit organizations.

Service Recognition for Employees

KSM highlights employee service in various ways. KSM regularly recognizes employees who have developed meaningful relationships with community organizations, including serving as a board member, engaging as a volunteer, or using their voice as an advocate for the organization's mission. Additionally, KSM presents annual Vision Awards, one of which recognizes employees who excel in community leadership.

Is this something your organization is interested in or already doing? Serve Indiana would love to hear your story! Please reach out to Serve Indiana's Employer Based Volunteer Program Manager at info@serveindiana.gov.



Look Beyond the Usual Suspects

Some companies feel more comfortable partnering with large, well-resourced organizations with name recognition and visibility. There are benefits to partnering with these organizations—primarily, they are accustomed to working with corporations. These partnerships can feel lower risk, since the organization may work with peer companies and may be well-positioned to produce solid events, provide good customer service, and offer strong communications support. However, looking beyond these “usual suspects” to build other community relationships has its own opportunities.

While smaller community-based organizations (CBOs) may be harder to find and have less name recognition and experience working with corporate partners, they often work on the front lines of key issues and have strong, firsthand knowledge of the community’s needs. In addition to a wealth of knowledge and experience, they can offer corporate partners the opportunity to meet urgent needs and to see the direct impact of their work. Smaller partners may also be nimbler and more willing to pilot a new approach.

In addition, corporate resources and volunteers can potentially serve as true game-changers for smaller organizations. Corporate engagement can help conserve a smaller organization’s resources, increase its capacity, and broaden its name recognition and its impact. The visibility that a small organization may get from a corporate partnership may have inherent value beyond volunteer support.

Go Outside Your Comfort Zone

Understand that in order to have the biggest impact, your company may need to travel outside its comfort zone (both literally and figuratively) to access smaller CBOs—but for the right partnership, it can be very rewarding. This may require research into other communities in immediate or close proximity. Take a chance and be open to working with new communities and organizations that you may not have heard of before. Do your due diligence to ensure the potential partners meet your requirements. Explore multiple potential partner organizations to find one or more that resonate with your company. To pilot a partnership, start with a smaller commitment or project. Be sure to ask the organization what the minimum or recommended project length is to make it worthwhile for them and be sure that you can commit to that.

To find organizations working in the areas of greatest need, consider connecting with local, grassroots organizations and smaller CBOs, which are often run by community leaders and directly-impacted stakeholders. Also, refer to the resources for getting informed listed in Section One of this guide.

If you are responsible for a national or global network of volunteers, unify your domestic and/or global offices around the globe through shared principles and focus areas for volunteerism. Remain connected through the priorities your company has identified but on a local level, give each office the freedom and encouragement to identify local partnerships that best address those opportunities in each location. Localized partnerships will maximize impact and employee engagement.

Dive Deeper with Existing Partners

If you find an organization that is doing great work and is a strong partner for volunteer activities, stick with them and find ways to expand the relationship, get more deeply involved in their work, and advocate for a budget to support. When there are opportunities to expand your company’s portfolio of activities, consider doing more with existing partners. Changing partners regularly can be taxing for your team and for smaller partner organizations.

Recommend the partner to peer companies and colleagues. For smaller organizations, a referral from a partner can be a really important way to get visibility with and access to other potential corporate partners.

If your company is already engaged in larger national and global partnerships, consider balancing your portfolio of partners with some local community organizations.

Tips for working with smaller organizations:

- Be mindful of the organization's capacity and needs
- Be sure your partnership adds value and does not create an additional burden for minimal results
- Bring ideas and resources to the table for discussion and exploration.
- Know it may take more time to navigate a partnership with a smaller organization, but the potential rewards (impact, experience, storytelling) may be worthwhile.

Tool: Draft Pitch/Intro to A Potential Partner Letter (Template)

Company Name _____

Directions: If you mapped your assets in Section One, pull from that activity and from your customized Potential Partner Checklist further up in this section to fill in the blanks below and reflect on how you want to approach a potential partner. This is just a starting point. Revise, add, and delete from the template below to make it your own and help clarify your thinking about a potential partnership.

Our company's volunteerism aims to [impact you're seeking that aligns with the company's mission/values/vision] while [primary motivations for volunteering].

We are able to leverage our [relevant strength/asset] and our [relevant strength/asset] as part of a potential partnership.

Our priorities for a partnership are [what you're looking for a partner to bring to the table]. We think a partnership with [potential partner] could be a great fit because [what is unique about this organization that you're excited about].

Together we can [what you hope to achieve].

Tool: Draft Pitch/Intro to A Potential Partner Letter (Sample)

Company Name: Company X-IT Firm

Our company's volunteerism aims to create opportunities for employees to establish meaningful and enduring connections with community partners while providing support to service projects by helping develop functional and innovative strategies and solutions through skills-based activities.

We are able to leverage our expertise in implementing tech-based services and our experience with project management and executive leadership as part of a potential partnership.

Our priorities for a partnership are transparent communication about values, needs, demands, and adaptability in the face of potential obstacles. We think a partnership with Organization X could be a great fit because despite reductions in staffing and overall capacity, its team has remained committed to working on behalf of our shared communities in the midst of the COVID-19 pandemic by effectively assessing its available resources and rescaling its services as needed.

Together we can maximize our impact in advancing COVID-19 recovery efforts in our communities by helping to address immediate needs and helping to build up self-reinforcing networks within the communities themselves.

Section 4: Engage Thoughtfully

Tool:

- First Meeting Checklist

Key Takeaways:

- Prepare yourself
- Listen with intention
- Lead with transparency
- Adapt and be flexible
- Foster collaboration through open communication

A partnership is more than a transactional agreement. It is a relationship that requires give and take, authentic sharing, listening, learning, and keeping the health of the partnership top of mind as you craft a plan to work together. Remember that how you engage with your nonprofit partner is just as important as the outcomes of your partnership. Always be respectful of your partner's knowledge, expertise, work, and impact. Just because a corporate partner may choose to invest time and resources in a partnership does not mean the partnership is unbalanced.

Remind your partner that you aim to be equal partners and that you welcome honest and direct communication and input. You may also want to acknowledge the inherent power dynamics in a funder relationship and communicate your understanding that your position as a funder comes with the responsibility to help balance that dynamic through open discussion, equal input, and openness to feedback.

Healthy partnerships can grow to be long-term and deeper relationships that lead to greater community impact, richer communications and storytelling, and greater efficiency in operations and implementation.

Prepare Yourself

Before meeting with a new potential nonprofit partner, research and learn about the organization's mission, work, capacity, and how they operate. Take the time to understand the potential partner organization and the communities it serves. Look at its website, search news stories, and explore any studies, articles, or collaborative thought leadership projects that involve the potential partner.

After taking these steps, don't assume you know all there is to know. Let your potential partner know what you have learned about their work but that there is no better way to learn than by hearing the information directly. Invite your partner to educate you on their clients, communities, and specific opportunities and challenges they face.

Tool: First Meeting Checklist

Consider visiting your potential partner at their location so you get first-hand experience of their community and work environment.

Ask About:

- The organization's history, its work and approach, and its immediate and long-term needs
- The community the organization serves and any relevant history, dynamics, or important information
- Staffing, including the structure and organizational capacity, particularly around the execution of volunteer activities
- What has or hasn't worked before with previous partnerships and how that might inform the way they would like to work with your company
- Volunteer projects that have worked well for the organization in the past and new ideas they want to explore
- Costs for project coordination and other organizational resources
- Sustainability plan for the project if relevant and/or organization's capacity to maintain the work completed by the volunteers
- Other priorities the organization may have or want to discuss with you

Model the candid and direct communication you expect from your partners and share:

- Your company's goals and priorities for volunteer engagement
- Organizational core competencies and employee skill sets
- General parameters of how your company approaches volunteer partnerships
- Your willingness to be flexible and listen to the organization's needs while being upfront about ideas and parameters you may have:
 - Initial ideas around project size, scope, time frame, etc.
 - Your company's project budget or approach to handling costs associated with volunteer activities
 - Specific requests, limitations, or criteria your company has for this project or initiative
- What resources you bring to the table that go beyond volunteer power

Listen With Intention

Your nonprofit partner has a wealth of knowledge and expertise concerning its community and clients. Your partner also knows what types of engagement will best meet the community's needs. You may have an idea of how you would like your volunteers to serve, but first, ask your partner what they need and how you can help. Together you can build a plan for partnership that will meet both your needs.

Before jumping into a partnership, understand that your nonprofit partner may not have the same ideas, expectations, or context as you. Ask your partner about their expectations of partnership and how they like to work with partners. Listen closely to what they have to say and share your own perspective. Only after engaging in this kind of dialogue will both parties have the information they need to recognize a match.

To be a good partner, you don't have to say yes to everything a partner suggests. Listen to their perspective and share yours. Open and equal communication is critical to the success of all partnerships regardless of the size or scale.

Tips for success:

- Always ask the partner what is best for them. Don't assume.
- Ask if the nonprofit has worked with other companies in the past and about what worked or what didn't work about those partnerships.
- Invite them to be candid and open about expectations and reservations so you can respond, share your thoughts, and have a productive discussion.

Lead With Transparency

Transparency is critical for any successful partnership, sharing motivations and expectations upfront—and questions and concerns along the way—are keys to laying the groundwork for a lasting partnership that adds value for all partners.

This applies to all aspects of the partnership, especially financial needs and support, which can be challenging to discuss openly. A commitment to transparency and open communication is one of the best ways to balance the inherent power dynamics in a funder relationship as it demonstrates your commitment to collaboration as partners.

Get Comfortable Talking About Money

Money can be a difficult topic to navigate, and the dynamics between for-profits and nonprofits can make it even trickier. Transparency about budgets and your approach to funding volunteer initiatives will set the stage for open communication and trust from the start.

First, understand that there is a significant cost to the nonprofit to create and implement volunteer activities (even virtual projects)! Your volunteers will make contributions and help address needs, but there is a great deal of work involved to coordinate high-quality experiences that have an impact. The costs go beyond materials and supplies needed and extend to staff time to coordinate, plan, execute, communicate, and report on the event. Depending on the project, there may also be costs for technology, refreshments, and other services. Be prepared to initiate the conversations to discuss these costs with both your partner and your internal decision-makers.

Because nonprofits often have concerns about discussing funding too early and thereby closing the door on potential partnerships, be proactive and broach this topic early in your conversations. It can be a relief for your potential partner. Additionally, nonprofits, especially ones that may not have as much experience working with businesses, sometimes undervalue their services and may struggle mid-partnership when they realize they've overcommitted. Budgeted costs for nonprofits hosting volunteer projects typically include any direct material costs associated with the project, staff time for coordinating and facilitating the project, costs of background checks/screening for volunteers, and general operating costs.

If you have budget limitations, share those upfront and be prepared to work with your partner to craft a scope of work that is realistic and fair. This will build trust and ensure that you are setting the initiative up for success.

Other Areas for Transparency

Be Clear About:

- Your role and where you sit at your company. Is this your primary role as part of a Corporate Social Responsibility (CSR) team, or do you represent another area of the company? This will help to set the nonprofit organization's expectations and help them understand if they're developing a partnership with an individual, a specific team, or with the company.
- Whether you are interested in a one-off engagement or are looking to develop a longer-term partnership. This may impact how much time and energy the organization is willing and able to invest in your event and/or partnership.
- Your motivations. In addition to helping the community, what are your priorities as a company for this partnership? Do you hope for media attention or increased local visibility? Do you expect senior leaders to be present and need the organization to offer more custom support?
- What you can and can't commit to doing to support the event and/or partnership. Do not make promises that you can't keep and invite the organization to have the same level of candor with you.
- Your expectation for giving and receiving feedback to/from your partner so you can continue to evolve the partnership.

Tips For Success:

- Put all of your cards on the table, be open about your company's approach to budgeting for volunteer engagement and ask your partner for a candid account of the resources it will take on their end.
- Consider additional resources, beyond dollars and volunteering, to complement your financial support (e.g. technology, product donations, space, comms/PR support, etc.).
- When possible, consider making an unrestricted gift to your partner, beyond the cost of the project, to support and further their work.

Adapt and Be Flexible

While it is helpful for both parties to approach the first conversation with a sense of what they seek from a partnership, remaining open and flexible helps to develop a relationship that works well for all parties and results in maximum impact on the community.

Explore your partner's needs and ideas. Frame any specific asks as requests and ask what is realistic for the potential partner organization. If the potential partner hesitates in responding, explore and see if there is anything you can do to make your ask more feasible. Be both prepared and receptive to having your request declined. You don't want a reluctant partner who can't deliver on your asks. You want a vocal partner who will work with you and align on what is possible and what isn't.

Keep in mind that no matter how much planning and coordination you do in advance, every successful partnership needs to be flexible, as unforeseen opportunities and challenges inevitably arise and need to be addressed.

Tips For Success:

- **Start Early:** Allow ample time for planning and build in time for delays and unexpected surprises. Discuss schedules and align on a shared timeline early on to account for competing priorities (e.g. galas, fundraisers, board meetings that may stall either side for a period of time).
- **No Means No:** Don't push if your potential partner seems hesitant about an idea. They probably have a good reason. Ask questions to understand their concerns and explore other potential options that would work well for all.
- **Accommodate Your Partner:** Nonprofits are often stretched for capacity and may not always be able to align with your timeline or vision. If the partner seems like a good fit, work with them to adjust timelines and scope to make it work.

Foster Collaboration Through Open Communication

A strong partnership requires ongoing thoughtful dialogue and parties that are willing to engage in a collaborative way. When you take the time to cultivate and steward a partnership, you build the mutual trust and respect each partner needs to reach shared goals more effectively.

Set the Tone: Remember that you are forging a partnership where both parties have something to offer and something to gain. Frame the potential partnership in this way. Use language like "we would like to collaborate to address community needs" or "support your work in the community" as opposed to "we would like to help you" which implies that benefits only flow in one direction.

Share the Decision Making: Early on, align on how decisions will be made. Ensure the decision-making process considers views from all sides of the partnership. Full consensus may not always be realistic or efficient but identify the decision-makers on both sides and ensure that all important decisions flow through them.

Document the Partnership: Having a document that outlines the basic terms of agreement is an important starting point to any partnership. Once the partner organizations agree upon how they will work together, document the details to ensure both sides are clear on expectations, deliverables, and timelines. To protect all parties, acknowledge that there may be unforeseeable circumstances that require adjustments in the original document/agreement. Note that any proposed changes will be discussed and decided with the consent of all parties. Many organizations create an MOA or MOU (Memorandum of Agreement/Understanding) to ensure clarity and understanding. Don't limit this practice to framing the partnership alone. Document your plans for an event and who is responsible for what. This will serve you well as a guiding document with assigned accountability for all deliverables.

Set a Cadence for Staying Connected: You will want to stay connected throughout the partnership and be in touch regularly to discuss progress, questions, decisions, and opportunities that arise. Checking in regularly also provides an opportunity to ensure everyone is aligned and to surface any concerns or issues that may need to be addressed. While each partner can make themselves available for spontaneous conversations, a regular cadence with consolidated points of contact will help keep the partnership on track and ensure any concerns arise in a timely manner.

Tips For Success:

- **Model Open Communication:** Be candid and actively invite your partner's feedback.
- **Read Signals:** If your partner seems hesitant or doubtful, check in with them to learn what concerns them. Work with your partner to find appropriate solutions.
- **Be Proactive:** Don't wait for a misunderstanding to happen. Circumstances can change. Proactively check in with your partner at every scheduled conversation to ensure any potential challenges are addressed sooner rather than later.

Section 5: Evaluate and Evolve

Key Takeaways:

- Build evaluation in early
- Be selective about what to measure
- Reflect and evolve

Evaluation is as core a part of any volunteer program, as are the details of the program itself. In addition to offering employees impactful and rewarding volunteer opportunities through carefully forged partnerships, you will need to determine the best ways to measure that impact on employees, your partners, and the communities you serve.

Build Evaluation in Early

As you design your volunteer activity, make a plan with your partner early on to measure the effectiveness of your initiative, both in terms of impact and meeting community needs, and in terms of employee engagement.

It is much easier to build this in when your program launches than to try to determine effective ways to measure impact once the program is underway. Evaluation is important for short-term or one-off activities because lessons learned will inform future planning. Evaluation is just as critical for longer-term partnerships or commitments to ensure continuous improvement of your program and maximum impact in the long run.

Consider the Following:

- Create ongoing opportunities for your partner organization and employee volunteers to surface any issues, challenges, concerns, or suggestions. This could include things like:
 - A partner questionnaire to track your performance as a partner. While you hope your partners will feel comfortable discussing concerns directly with you, a survey provides one more avenue for feedback that may deliver helpful insights you haven't yet received.
 - A brief employee survey to capture feedback on the volunteer activity and the experience leading up to it to see if there are any gaps you can address for future events.
- Align on a cadence for reporting and what type of information you want to receive from your partner. Think about data and anecdotes to facilitate external storytelling for both your company and your partner organization.
- Determine how you will measure the success of your partnership and volunteer activities. Align with internal stakeholders to ensure you can capture, evaluate, and report metrics to gauge your success.

Be Selective About What You Measure

Measurement and evaluation are indicant undertaking that need to be well planned and properly resources. Most methods of evaluation require an investment of time from program managers, volunteers, and your partner organization, so be selective about what you measure. Keep it simple, especially at the start.

Think about the questions you will want to answer to evaluate program outcomes and impact. What will your program managers and other key stakeholders want to know? Frame evaluation questions that will gather those answers.

A combination of quantitative and qualitative metrics will provide both data points and stories to complement each other and convey a sense of accomplishment. Prioritize which are the most important to your company and your partner organization and determine how best to measure.

Reflect and Evolve

Collecting data is only the first part of evaluation. The next piece—reflection—is critical to mine the data to improve your program and its impact. After you've measured your volunteers' impact, and the experiences of all those involved, you can begin to use that information to evaluate what can be improved or changed going forward.

Build internal conversations with key stakeholders and reflection sessions with your partner organization into your annual calendar to review data and feedback and to consider changes you might want to make to ensure both the program, and your partnership(s) are effective, efficient and deliver value to all key stakeholders.

Section 6: Best Practices for A Volunteer Event

Tool:

- Sample Day-Of Checklist

Key Takeaways:

- Prepare your volunteers
- Continue thoughtful engagement

Prepare Your Volunteers

Once you have decided on the employee volunteer components of your partnership and identified your volunteers, it is important to communicate with the employee volunteers to prepare them for the experience.

To enrich your volunteers' experience at the event, provide your volunteers with some context on our nonprofit partner, the community need(s) they will address, why this activity is meaningful to the company, and what you hope to achieve through this and other similar activities. Leverage the organization's website and/or videos of their work as resources for employees to watch before event day, and take care to avoid painting the community or groups you are working with through a deficit lens.

Consider asking your partner organization whether an employee training in advance of the project might be relevant or useful based on the activity—they can often present information about the need and also honor the assets and strengths the community holds. If needed, work with your partner to build the content and format. If the project will involve client contact, ensure employees are aware of what to expect and how to prepare. If your project requires a bit of travel to a community or neighborhood that is a distance from your office, take the following steps to keep your employees engaged:

- Share how this event presents a unique opportunity for employee volunteers to make a meaningful difference on a critical issue facing this neighborhood.
- Arrange group meeting points or alternative transportation and consider reimbursing for travel to make the trip easy for employees.
- Charter buses and use the time enroute as a culture or team-building opportunity
- Explore adding virtual volunteer activities to support partners in harder to reach communities, provided that aligns with your nonprofit partner's needs and capacity.

The day before the event, send a reminder email to all volunteers. This email should include logistics, schedule for the day, weather forecast and a rain date (if needed), what to wear, what to bring (water bottles, rain gear, gloves, etc.), and what will be provided (lunch, sunscreen, work gloves, etc.), so everyone can prepare themselves for a great day. Ensure employees know how to reach out to you with any last-minute questions they may have.

Continue Thoughtful Engagement

Good corporate partners establish strong partnership practices in the introductory and planning phases for a volunteer event. Great partners, however, stay respectful and thoughtful and maintain a can-do attitude during the height of activity and amid any last-minute challenges that happen on the day of the event.

Stick to the Plan: Respect the agreements made with your partner during the planning phase and stay in frequent communication. Keep in mind that your partner will have prepared for the number of volunteers you said you would deliver, in terms of COVID safety, supplies, staffing, client participation, and budget. Sometimes, circumstances arise that force a change of plans. If that happens, give your partner as much notice as possible. Understand that if you don't fulfill your stated commitment to the nonprofit, you should discuss alternatives with the partner and explore a follow-up or other plan to complete the work your volunteers had planned to do.

Don't Steal the Spotlight: At the event, minimize speeches from your senior leaders about your company's priorities and let your partner organization showcase its work and engage the volunteers in their cause. Prepare senior leaders in advance and share with them the plan for the day. If you expect press at your event, ensure that the nonprofit has agreed to the plan and that the press elements do not become the focus of the activity and distract the volunteers or drain the nonprofit's staffing resources.

Plan Ahead and Respect Guidelines: In advance of the event, confirm media guidelines with your partner. Ask whether it is okay to take and use pre-and post-event photos, particularly if clients/minors are in the shot. Ensure all volunteers and/or anyone who appears in a photo has signed a waiver. Talk with the partner organization about how they want to be positioned in social media and, if appropriate, share a template with employees to ensure respectful posting, particularly if the project serves a vulnerable population.

Be Gracious: Check in with your partner throughout the event and be willing to help if and when needed. If something goes awry, don't place blame—work with the partner to resolve the situation in the best way possible. If necessary, be candid with employee volunteers to say you've encountered a challenge or delay, and you appreciate their patience and understanding. At the end of the event, thank your partner, any clients or community members, and your volunteers for everyone's participation. If you are taking professional photos, offer to share all photos with the organization to fuel your partner's storytelling.

Tool: Sample Day-Of Checklist (For In-Person, Traditional Activities)

- Arrive early to help partner with any last-minute set up and to verify that all materials are ready and tasks are prepped.
 - Bring extras of things like photo waivers or other necessary documents that were sent in advance.
- Set up a station with water, sunblock, refreshments, etc.
- As part of welcoming volunteers, have the nonprofit organization talk about the mission of the organization and how this project will support that mission, along with a brief overview of the schedule and tasks for the day.
- Help to motivate and manage volunteers; be informed about project details so you can help answer questions.
- At the midway point, check-in on progress so you can help to steer volunteers to priority tasks so critical ones get completed.
- Capture the day with photos and videos.
 - If your company has a photo or media waiver, be sure to comply with anyone who has declined to sign.
 - Coordinate with your partner organization on any photos of nonprofit staff or clients.
- Record any available impact statistics that you may want to report.
- Consider ending the day with a reflection depending on group size (e.g. anything that surprised volunteers or what they enjoyed most).
- Thank volunteers and thank your nonprofit partner. If your nonprofit partner is able to, ask them to share the impact of the work completed so volunteers understand the value of their service.
- Post-event:
 - Schedule time to debrief with your partner organization and reflect on what went well and what you may want to adjust for future projects.
 - Send a thank you email to all volunteers who participated, consider attaching a photo or recapping the impact of the event.

Section 7: Set Volunteer Engagement Up for Success

Key Takeaways

- Foster a culture that supports volunteerism
- Put supports in place

Foster A Culture That Supports Volunteerism

While exploring partnerships and opportunities around employee volunteerism, you may find opportunities to reflect on and evolve your company culture to better support these activities and foster a culture that supports community engagement. Below are some ideas to get you started:

Ensure Leaders Lead by Example: Internal alignment is more than having senior leaders agree to an idea. They must agree to lead by example, to show up at service events, and work hard. If leaders participate, it's easier to make a case for others to get involved as well.

Reward and Recognize Employees Who Volunteer: Celebrate employees who volunteer and particularly those who take on a leadership role and embody the spirit of your company's volunteer initiatives. Recognize them at company meetings and have your senior leaders share their stories with all employees.

Highlight Volunteerism Internally and Externally: An important way to know if a company values something is to see them talking about it. Even before an employee comes on board, they can see that your company values community engagement if it's represented in recruitment materials and again during onboarding. Consider including a reference to volunteerism or a commitment to the community as part of the company's values statement. Find ways to spotlight volunteerism and share stories, photos, and impact from service events on internal and external channels so employees see that volunteering is strongly encouraged and celebrated.

Offer Incentives for Volunteer Team Leaders: Offer swag, training and leadership development opportunities, and visibility and access to senior leaders. Give leaders some ownership (with clear guidelines) on selecting projects and partner organizations. Let their managers know how this experience is helping to build their leadership and project management skills.

Collaborate with Internal Stakeholders: Partner up with other internal teams to leverage volunteerism to meet a range of internal goals. Collaborate with human resources/talent development to explore incorporating volunteerism leadership development initiatives and promoting to managers as a tool for employee skill development. Work with internal Employee Resource Groups to understand or identify social impact goals and promote opportunities to their networks. Promote team-building benefits of volunteerism to department heads and team leads to consider when programming offsites and retreats.

Align Volunteer Activities to the Business: Build relationships with internal stakeholders to understand the unique skills and resources your employees possess that might be relevant to community partners. Finding a volunteer activity that taps into the unique skills of your people could be very exciting to highlight both internally and externally to customers and other stakeholders, giving it more visibility and credibility with senior leaders and employees.

Put Supports in Place

Offering tangible support for employees and nonprofit partners can demonstrate a real commitment to volunteerism and the community and encourage more engagement from employees. Many of these are also considered attractive benefits from a recruitment and retention standpoint so consider teaming up with your Human Resources colleagues to advocate for some of these benefits together. There is a broad range of ideas and programs to consider and explore, below is a short list of some of the most common programs often seen at companies that encourage volunteerism.

Matching Gift: Match employees' personal contributions to eligible nonprofit organizations (typically up to a certain dollar amount annually; organization guidelines vary by company).

Dollars for Doers: Match employee volunteer time with monetary donations to partner organizations. These programs can be personal/individual volunteer activities as well as team activities where a group of employees decide to volunteer together. Dollar amounts typically correlate to the amount of time volunteered or employees are required to meet a minimum number of hours in order to qualify for a flat grant.

Paid Time Off to Volunteer: Offer employees paid time off (separate from vacation and sick days) to volunteer with eligible organizations. Manager approval usually required; amount of time varies by company and ranges from eight to 40 hours per year.

Board Service Training/Matching: Offer training for employees interested in exploring nonprofit board service as an individual volunteer activity. Board service is a great way to build capacity and make a difference through volunteerism, but employees are often not aware of the responsibilities and personal/professional benefits of board service. Some companies also offer a matching service for employees to help them find a nonprofit board that is a good fit for their skills and interests. Be aware that board service often requires personal financial commitment so communicate with employees clearly if your company is only facilitating training and/or matching but not committing to cover employees' charitable contributions (beyond what would qualify through the Matching Gift or Dollars for Doers).

Conclusion

We trust this toolkit has served you well and will continue to be a valued resource. Whether you use the guide in its entirety or focus on the sections that address your company's particular needs, we hope that the tools and resources provided help your business meet its goals for volunteer engagement while making a real difference in the community.

We hope this guide helps you create meaningful and authentic relationships with community organizations and nonprofits in Indiana. We truly believe that the greatest impact can be achieved by working in collaboration with our community partners, who know firsthand their neighborhoods' greatest needs and challenges as well as their greatest assets and strengths. We encourage you to approach with curiosity and a willingness to listen. We know that by building relationships and establishing deep trust with your community partners, together you will find ways to address critical needs in our city and make a lasting impact.

Serve Indiana's mission is to advance service and volunteerism by informing, connecting, and promoting opportunities and resources that enrich the lives of Hoosiers. This toolkit is just one of the resources we offer to support our business network in effectively engaging with nonprofits and community organizations to strengthen our city.

We thank you for your unwavering commitment and dedication to serving our communities. The partnerships and talents of our corporate neighbors are critical to lifting up our state, supporting our communities, and building a vibrant and just city where all Hoosiers can thrive.