



© CASE STUDIES: How to Translate a Global Strategy into Local Implementation Unilever, GE Commercial Finance, Citigroup and Allen & Overy LLP

Designing Europe-wide Corporate Community Investment programmes

If board level commitment and guidelines are necessary for a successful ECI project, experiences have shown that local initiatives and autonomy should be understood and achieved for more efficiency.

Case studies

- Evolution of a programme: Unilever
- Setting up: GE Commercial Finance
- Managing: Citigroup
- Overview: Allen & Overy LLP

Evolution of a programme: Unilever, Simon Goldrick

Unilever's experience has shown the 'global-local' way to succeed in an ECI project. Three stages have been tested for development of volunteering in Europe:

Stage 1 Locally-driven initiatives

- Tradition of organic local projects
- Local focus
- Little visibility/support outside local area
- Often positive but inconsistent

Stage 2 Centrally imposed initiatives

- Focused, professional and consistent
- Lack of emotional ownership by volunteers
- Feels like a 'typical corporate exercise'
- No real buy-in - initiatives fail

Stage 3 Local initiatives within wider framework

- Consistency of approach
- Professionalism through central coordination
- Local ownership
- Highly successful
- Vitality Summer 2004

Principles of employee motivation

- Ownership is critical
- Volunteering is personal; work is public
- Benefits to company must be acceptable
- Long-term commitment
- Different people want different levels of involvement



- Internal marketing must be appropriate

Setting up: GE Commercial Finance, Ruth Bedingham

Background/need

A single ECI model applicable all over the world does not exist. A volunteering programme that works in the UK, will not necessarily work in Paris, Moscow or Amsterdam. Therefore local knowledge, hearts and minds of local employees is vital to building the programme. Even though companies recognise this, they often still struggle to launch outside the country where their head office is based.

What and how?

There are four vital steps to ensure a programme is launched effectively:

1. Build Business Case and Leadership Buy-In - include CSR in your business vision, put it on the agenda of business meetings, and encourage leadership to offer development opportunities through volunteering, establish a policy on volunteering in work time
2. Experience it - once volunteers have had their first taste of volunteering they are usually hooked – build a community challenge into company meetings or make it an all-employee afternoon event
3. Engage the energy of local employees by brainstorming with them for ideas of how and where they can get involved - invite local community groups to come in and talk to them. Work with the ENGAGE partners. Then find sustainable projects of which employees can be proud.
4. Report, reward and recognise - make sure the internal and external communications people publicise good community stories, recognise those individuals who have given their time, even if it is only a personal thank you. Introduce some sort of reward structure for outstanding achievement.

Those four vital elements to ensure a programme is robust and volunteers are enthusiastic, will not work without each other

Key Learning

- Don't miss one of the steps - all are as important as each other
- Be flexible and keep management involved at all times
- Do a stakeholder analysis to ensure that all management at all levels are on side
- Often 'middle management' can be the stumbling block; look at strategies to address this

Impact

On employees



Employees are proud to work for a company which is recognised as giving back to the local community but in different ways in different cultures. If you are sensitive to this then they will be highly motivated. Employees who have been involved in mentoring programmes, working one to one with children, young adults, members of community organisations, really appreciate the opportunity to build their skills.

On business

The business benefits from happy employees who are able to develop through the skills they are learning. Young graduates are more and more looking to work with companies who are socially responsible so this can be a way of attracting top talent.

On target group/community organisation and society at large

By ensuring that projects are locally focused the communities needs are met and by concentrating on mentoring and capacity-building projects, the impact is sustainable.

Managing: Citigroup, Anouschka Elliott

Citigroup has a long-standing and clearly focused international community strategy, which matches its business expertise and strategic direction. Focus, infrastructure, decision-making, internal communication, employee engagement and how to measure success are all key elements that should be considered when designing an international corporate community investment programme.

How does it work?

The importance of focus

Focus is clearly a critical piece. With community giving there are so many worthy causes; danger is that giving can be spread so thinly that the ultimate message is lost. By having a more focused approach, companies can more accurately identify, implement and measure the success of programmes. In addition by developing expertise, companies are more able to allocate resources to the neediest causes.

Infrastructure

This depends entirely on the company; however in Citigroup's case given that it has a presence in 100 countries globally, it focuses on four regions: North America, Latin America, Asia Pacific and Europe, Middle East and Africa. Each region has a team of individuals focusing on community affairs. The regional community affairs officers then use in-country resources to help identify opportunities.

Decision-making

While there are some programmes that can be replicated around the world - for example Junior Achievement and Habitat for Humanity - the majority tend to be tailored specifically to local needs and cultural sensitivities. Its in-country resources provide the regional community affairs offices with an assessment of the needs of their local communities and recommendations for the giving in their countries. The regional team acts as a sounding



board and provides strategic advice and direction. Each of the grants requires thorough due diligence to ensure that it is: the most appropriate fit, reaches the most people, involves their employees through volunteerism, and has long-term potential and replicability.

Internal communications/engaging employees

Citigroup uses a variety of media to reach employees including: volunteering fairs, desk drops, emails, internal newsletters and the intranet. It has an external website which contains information about global community activities. In addition it has an internal community website for each region (some of the larger countries have their own websites).

It also runs various awards programmes for employees who have demonstrated exemplary commitment such as Volunteer of the Week.

Impact

Citigroup has a long-standing commitment to helping make the communities where it does business better places to live and work. Over the past year it has continued to strengthen its participation in a broad range of community-building initiatives that help foster healthy economies, such as financing affordable housing, helping to create and sustain micro lending programmes, helping NGOs and non-profits strengthen their operations, and supporting financial education, small business development and savings incentive programmes. Its approach to serving the community focuses on three key themes: Financial Education, Educating the Next Generation, and Building Communities and Entrepreneurs.

On 7 April Citigroup announced a \$200 million commitment to financial education over the next 10 years. The financial education programmes it supports help people of all ages learn how to better manage their money, protect their assets and overcome economic challenges. It also support small businesses through its micro finance initiatives and institutions such as governments and central banks. An example of this is its work with Junior Achievement. Last year Citigroup worked with JA in four continents in 32 countries. More than 1,400 of its employees served as JA volunteers. In EMEA alone its programmes reached 34,000 students.

It believes all children should have access to a high-quality education that helps them acquire the knowledge and skills to find a rewarding career, manage their lives and fully participate in society. Enhancing educational opportunities will better prepare the next generation for personal and professional success. Last year, the Citigroup Foundation worked with 1,147 partners in 49 countries and territories to help educate the next generation.

It also works with families who struggle to find affordable housing and with small-business owners trying to grow their businesses with few resources. Last year the Citigroup Foundation made 1,486 grants to support organisations that help build and strengthen communities such as Habitat for Humanity International, the National Council of La Raza,



ACCION International, and Women's World Banking. Last year, over \$1.7 million was contributed and over 10,000 employees volunteered on Habitat building projects.

'We aspire to be known as a company dedicated to community service, taking a leadership role in every local community around the world in which we operate, and making a positive difference in the communities where we live and work.'

Citigroup's values add value

'Thanks to Citigroup's support, "Money for Living" was launched in response to the report on the compliance of the Czech Republic with the Children's Rights Treaty, which was published by the UN Committee in Geneva. For the Czech Republic, the report's results were largely unfavourable. Children who spend a substantial part of their lives in group homes need to be properly prepared to enter the world when they are ready to leave. It is of critical importance that they be given a helping hand.'

Veduna Bubleova, Director, Centre for Substitute Family Care

Overview: Allen & Overy LLP – Shankari Chandran

Background

- Allen & Overy LLP's international programme is divided into pro bono (legal) and community (non legal) volunteering opportunities. These are based around the themes of Access to Justice and Education, which were agreed through an annual company survey in 2006.
- Individual company offices are encouraged to develop small projects that respond to local needs and meet staff interests and utilise their skills.
- Allen & Overy LLP seeks small local charities with whom it can develop long-term volunteering relationships; the company prefers ongoing projects (e.g. where it acts as counsel for all of a charity's legal needs) but uses team challenges to raise awareness and enthusiasm for volunteering.
- In 2005/6 Allen & Overy LLP staff volunteered 28,000 hours globally, valued at £12m, with 76 per cent of fee earners in the London office participating.

Examples of Allen & Overy LLP's employee engagement

- Education schemes such as reading, numeracy, mentoring, employability training schemes and regular collections for deprived local schools / orphanages (Amsterdam, Bangkok, Frankfurt, London, Moscow offices)
- On-going advice to small charities (several offices)



- Human rights research, advice and cases (Brussels, London, Hong Kong, New York offices)
- Representation of Guantanamo Bay detainees (New York office)
- Social policy and law reform work (Brussels – road safety; London – legal aid funding and human rights)

Key Learning

- Visible and active senior leadership is imperative. Allen & Overy LLP's senior partner is committed to the programme; he regularly communicates its importance to the firm and encourages staff participation.
- A strategy that fits company culture is also imperative. For Allen & Overy LLP, using local champions (partners and other staff) to develop local programmes has been more successful than imposing a model from the London office. The Allen & Overy LLP Board's recent approval of the new pro bono and community affairs policy is more powerful to partners and staff, than "pro bono" partner committee approval of the policy.
- A consistent policy infrastructure (in relation to time off, time recording, appraisal recognition, matter inception and compliance) is necessary. However, local development should be mindful of local culture, regulations and sensitivities.
- Working with other teams to ensure the programme is consistent with and supports other key policy initiatives of the business is very important (eg. the Allen & Overy LLP Pro Bono Team works closely with the Diversity Team on projects that broaden access to the profession).
- Volunteering should be recognised formally (through appraisals) and informally, although appraisal forms often include references to volunteering, it is worth regularly reminding appraisers to focus on it.
- Allen & Overy LLP uses all methods of communication to embed its international programme in to the psyche of the firm while remaining aware of different cultural attitudes to "talking about [marketing] volunteering".
- Allen & Overy LLP tries to showcase the successes of its international offices and asks them to lead projects, so that the programme does not appear to be London-driven.
- Company focus has shifted from input recording to impact measuring; this is difficult to do (particularly for education schemes where it is part of a larger literacy programme) but it keeps trying.



- Multi-jurisdictional projects have helped to build a sense of community within the company as well as appeal to an organisation's sense of internal competition.
- Collaboration with clients on community projects can strengthen client relationships and convert / convince (the most stubborn of) partners about the business benefits of volunteering.
- Progress has never been as fast as the Allen & Overy LLP Pro Bono Team would like it to be, but the positive impact on the community and the business has usually proven to be greater than imagined.