

# Tata Group Volunteering Guidelines

2016-17






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# Introduction





The Tata group's mission statement is 'To improve the quality of life of the communities we serve globally through long term stakeholder value creation based on Leadership with Trust'. Volunteering is one of the key mechanisms that channelizes our most valuable assets, our people, towards societal good and contributes towards this mission. With over 6, 50, 000 employees across the globe, we believe we can create a positive difference in the lives of many.

The Tata Sustainability Group (TSG) is a group resource meant to guide and advise Tata companies on sustainability and also execute group CSR programmes, the group volunteering programme – Tata Engage – and disaster response.

As a part of its services for Tata companies, TSG prepares and disseminates guidelines on different sustainability-related themes. The Tata group Volunteering Guidelines have been prepared to support Tata companies to develop their own corporate volunteering programmes and thereby provide an enabling environment for employee volunteering.

The guidelines begin with a context; setting out definitions for volunteering and corporate volunteering, describing the Tata group's thinking on volunteering and why it considers employee volunteering to be important, outlining the group volunteering programme, Tata Engage, including the roles of TSG and group companies within it, and then stating the purpose of these guidelines. This is followed by sections on developing an effective corporate volunteering programme, formulating a volunteering policy, curating a volunteering activity or project, and managing expectations and dealing with the multiple challenges that can be confronted in implementing volunteering programmes. The guidelines end with a glossary of key terms, a set of annexures, and references.

These guidelines have been written for two sets of people within Tata companies: those responsible for designing and implementing volunteering programmes and the CHRO who is responsible for all matters relating to employees.

## Purpose of these guidelines

These guidelines aim to offer a starting point for companies that are interested in developing a corporate volunteering programme and policy as well as a guide for those who wish to assess and fine-tune an existing programme and policy. Like any other guidelines, this document provides a broad direction and should be adapted to suit the circumstances and requirements of each individual Tata company. It is expected that, with the help of these guidelines, all Tata group companies will develop and adopt a volunteering policy, which will be made available to all employees and will outline the structure of the company's volunteering programme and the support offered to volunteers.



# Context



# What is volunteering?

Volunteering is the commitment of time and skills for the benefit of society and the community, the environment, or individuals outside of (or in addition to) one's immediate family, without expecting anything in return. Volunteering is generally unpaid, is **undertaken freely and by choice** and is often done through a partner organization (non-profit and/or social enterprise) whose mission is to improve some aspect of society, the environment, or culture.



It is an act in recognition of a need

It is doing something that benefits someone else

It could be for community and/or environment

It is done without concern for monetary profit

It could be through contribution of time and/or skills

What constitutes volunteering? A wide variety of activities come within the ambit of volunteering and it would be impossible to make a comprehensive list of them. Some indicative activities include:

- Teaching children
- Building and/or painting a school, home or community centre for the underprivileged
- Providing career guidance to young people
- Donating blood
- Planting trees on public land
- Providing guidance and advice to non-profits in different capacities including as a board member or an advisor.

What does not constitute volunteering?

- Donating money or articles in kind
- Visiting a stall set up by a partner organization and purchasing something
- Doing something for friends or family members
- Attending events or sessions without playing an active role
- Participating in activities conducted for the company's permanent employees. However, participating in activities for contract employees from economically disadvantaged backgrounds could be considered as volunteering
- Senior leaders mentoring the community development team in a Tata company



- Attending company townhalls or department meetings in which volunteering activities are being planned and discussed
- Undertaking an activity where the employee is not exercising free will but feels obligated or forced to do so.

## What is corporate volunteering?

Corporate volunteering is the encouragement and facilitation by the company of the volunteering activities of its employees. Typically, this involves the employees donating their time and expertise either during official work hours or on their personal time with some facet of company support. For example, a company makes an arrangement with a local school for its employees to volunteer as teachers on weekends and holidays – this will be considered as corporate volunteering because the company is curating the activities and thus providing its employees with a volunteering opportunity.

The company support could be by way of:

- Curating volunteering opportunities through its CSR programmes, its network of partner organizations, or its connections in neighbouring communities. The opportunities could be for skill-based activities – part time or secondments, as well as for other group volunteering activities requiring time and effort from volunteers, and could be on office time or on weekends and/or holidays
- Supporting employees who volunteer on their own (without any inputs from the company) by providing recognition, contribution matching, time off work, etc.

Different terms are used to describe volunteering done by company employees but for this document, the term used is Corporate Volunteering and programmes designed by companies to enable and facilitate corporate volunteering is referred to as Corporate Volunteering Programmes (CVPs).

## Why does the Tata group support corporate volunteering?

Volunteering is ingrained in the Tata way of functioning; its mention in Section F of the refreshed Tata Code of Conduct [Clause 10 of the original Code] demonstrates this fact.





“ We are committed to good corporate citizenship, and shall actively assist in the improvement of the quality of life of the people in the communities in which we operate. We engage with the community and other stakeholders to minimise any adverse impact that our business operations may have on the local community and the environment. *We encourage our workforce to volunteer on projects that benefit the communities in which we operate.* ”

Volunteering provides employees with an opportunity to learn from communities. It helps employees understand realities through actual experiences with communities, which in turn enables them to develop as complete individuals.

When employees of a company are seen by communities as helpful and caring individuals, it triggers a positive cycle in which the company enhances its own goodwill and reputation within communities, leading to greater credibility and firmer trust. An effective and responsive volunteering culture within a company reflects the quintessence of contributive leadership – one that clearly understands the interdependence of business and communities.

## Benefits of volunteering





## Benefits of volunteering

### Benefits to employees

- Helps channelize innate passion and potential, enabling them to give back to the society
- Helps develop leadership skills and soft skills such as problem solving, mentoring and communication skills
- Helps discover hidden talents and build new relationships with community and co-volunteers
- Adds variety and fulfilment and increases sense of well-being and confidence
- Enables interaction with employees in various functions and levels of the company
- Increases job satisfaction and morale, respect for company and community
- Creates awareness about the values and challenges of the communities and the voluntary sector
- Provides opportunities for meaningful experiences with family (in cases where CVP is extended to families).

### Benefits to Company:


- Boosts employee morale, team building and loyalty which is often associated with increased productivity and reduced absenteeism and turnover
- Fosters a culture of affiliation which creates bonding and trust among employees and enables cross-company/ cross-departmental collaboration
- Improves corporate image and relation with stakeholders through positioning as a leader in giving back at the local and national level
- Builds brand awareness and engenders trust within the community thereby enhancing company image
- Attracts new talent, especially millennials
- Demonstrates organizational values in action
- CVPs that also include employees' families enable employees to:
  - Spend quality time with their family
  - Be a positive role model and provide learning opportunities for children
  - Educate their families about their workplace, co-workers and the importance of good corporate citizenship.



# About Tata Engage

While Tata companies have traditionally organized volunteering programmes in their own capacity, a need was felt to collaborate and volunteer together as a group and thereby leverage the combined power of over 6, 50, 000 Tata employees across the globe. Tata Engage was launched on the 175th birth anniversary of our founder Jamsetji Tata as a first-of-its-kind group-wide volunteering programme that offers volunteering opportunities under three distinct formats.

Today, Tata Engage has emerged as a vibrant platform that kindles, nurtures and channelizes the volunteering spirit at Tata. Tata Engage promotes and encourages collaboration and inspires team building activities that can translate into better overall participation in volunteering.



**Tata Engage Objective:** Tata Engage encourages collective giving of time and skills by creating an enabling environment for employees to volunteer, demonstrating the group ethos of “Giving back to society”.

## Tata Engage Guiding Principles:

- Recognizing that, while volunteering can be done at an individual level, the power of collective or group volunteering should be encouraged and enabled
- Encouraging all types of volunteering; while emphasising opportunities that leverage the skills of volunteers
- Aligning volunteering activities with the local culture and context
- Recognizing all acts of volunteering, irrespective of their nature
- Developing and supporting volunteering through a strong ecosystem.

Tata Engage offers volunteering opportunities in three formats viz.

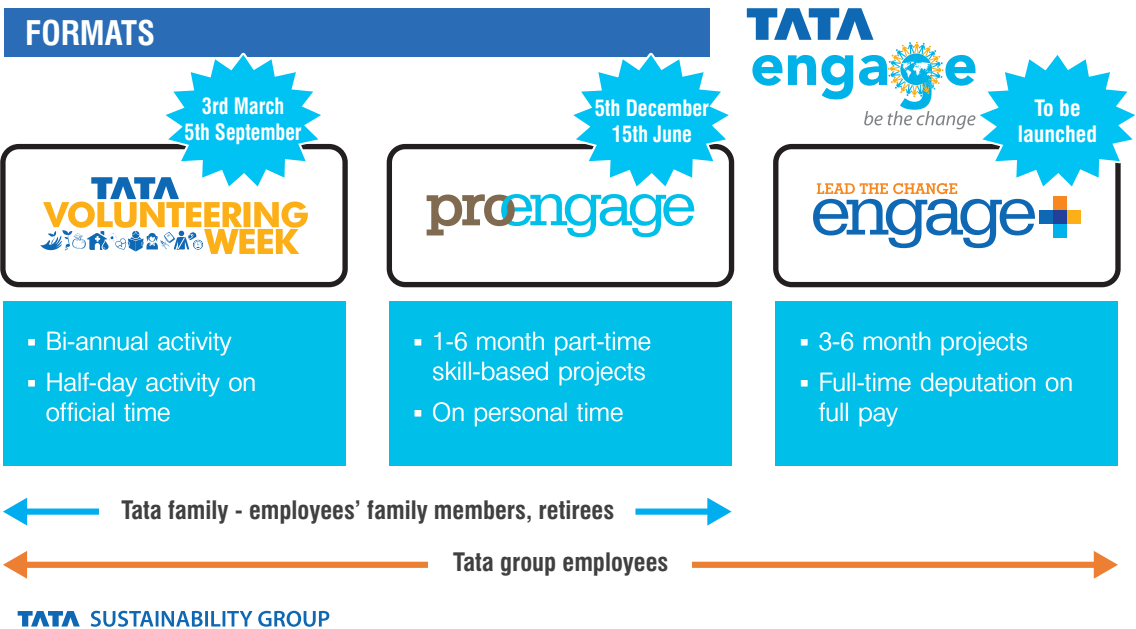
Tata Volunteering Week, ProEngage and Engage+. For more details, please visit [www.tataengage.com](http://www.tataengage.com) or see Annexure 2







# Tata Engage



While companies come together to participate in Tata Volunteering Weeks, ProEngage editions and Engage+, they also continue to volunteer throughout the year, outside of the Tata Engage platform.

**Online Presence:** Tata Engage's website, [www.tataengage.com](http://www.tataengage.com) offers employees a platform to view available volunteering opportunities and participate in activities/projects of their choice. Volunteers can also share experiences, upload photographs and videos on the website through the Experience Hub. Apart from the website, Tata Engage has a Facebook page: [www.facebook.com/TataEngage](http://www.facebook.com/TataEngage) and a Twitter hashtag: #tataengage (<https://twitter.com/hashtag/tataengage>), which can be used by volunteers and companies to share their stories and experiences.



# Tata group approach to volunteering

## **At the group level:**

Tata Sustainability Group (TSG) will plan and facilitate volunteering for the Tata group to enable Tata employees to collectively participate and volunteer.

- TSG will plan and execute Tata Engage initiatives, with the support of the companies
- Through Tata Engage, TSG has been promoting cross-collaboration among Tata companies. This implies that employees of any Tata company can participate in a volunteering activity organized by any other Tata company. In such a case, TSG requires the organizing company to track the volunteering hours of even those employees who are from other companies. TSG will then appropriately attribute the hours to the parent company while collating information
- TSG will create a platform for knowledge sharing on best practices within and outside the group
- TSG will consult with companies while creating group-level initiatives
- TSG will support companies in developing their volunteering policy and programmes
- TSG will be responsible for collating the volunteering performance at a group level. TSG seeks the support of all companies in ensuring that details are reported as and when requested.


## **At the company level:**

- Tata companies will encourage their employees to participate in Tata Engage initiatives, including allowing them to volunteer in their working hours during the Tata Volunteering Weeks and providing two working days off per quarter to volunteers working on ProEngage projects
- Companies will develop their own volunteering policy and programmes in line with the Tata group volunteering guidelines, including specifying terms of engagement with Tata Volunteering Week, ProEngage and Engage+ initiatives
- Companies are encouraged to sponsor employees for participation in the Engage+ initiative by addressing issues related to their compensation and re-deployment after completion of the project
- Companies will adequately track volunteering performance and provide necessary information to TSG as requested.

Group companies also support the disaster response programmes of the group through volunteer support. Broad guidelines on volunteering during disaster response are provided in Annexure 3.

# How to develop an effective Corporate Volunteering Programme (CVP)





Effective CVPs provide a measurable benefit to the community, are employee-driven, and bring added strategic value to the business. Incorporating the following elements in a CVP can go a long way in making it effective.

## 1. Identify the goals of the CVP

Successful CVPs are designed to be aligned with the company's values and core purpose as well as to its HR policy and CSR strategy, and are structured to meet specific goals. Before a company decides to establish a CVP Policy and programme, it needs to answer the question "What do we want to achieve through a CVP?" The answer leads to specific societal and employee related business goals for the CVP, and the subsequent setting out of clear strategies to achieve these goals. If the company already has a CVP in place, it must decide if the objectives of its CVP are aligned to its internal goals and, if not, whether to modify the programme so as to bring about an alignment.

The goals of a CVP should be periodically reviewed so as to reflect changes in its HR policy and CSR strategy.

## 2. Design a CVP

The CVP should be designed keeping in mind employee interests, community needs and company's CSR initiatives, and should be aligned to the identified goals of the programme. For instance, if one of the goals is to build team spirit among employees, group volunteering activities may be particularly relevant. Similarly, if a goal is to increase the employees' sensitivity to the poor, then programme design should bring employees directly in contact with the poor.

Successful CVPs recognize and align the interests and skills of company employees with community needs. In order to do so, employees first need a mechanism through which their interests and skills are communicated to the company. A common method of collecting information from a broad range of employees is through employee surveys. In addition, it is likely that some of the company's employees are already involved in volunteering in a personal capacity – this may be incorporated into the company's CVP, perhaps by matching time already spent by employees, or acknowledging their contribution in the company's volunteer recognition programme. Informal feedback from volunteers also feeds into the CVP and should be used to further enrich and align it to employees' needs.

It is important for companies to also focus on causes that connect with the business and the companies' CSR programmes. A successful CVP leverages the company's CSR activities to create meaningful volunteering opportunities. It also leverages the employees'



core competencies, such as IT skills, branding and communication skills, etc., to support partner organizations through employee volunteering. [See Annexure 4]



BEST PRACTICE

Example of a company that aligned employee interests and skills with its goals and its community's needs is Tata Consultancy Services (TCS). TCS employees utilize their technology skills to build technology solutions for non-profits and not only provide great value to the non-profits but also derive immense personal satisfaction for having meaningfully contributed to the society by using their skills.

During recruitment, the company noticed that the number of people entering the field of an acceptable quality were far lower than the number of positions available. Drawing from this experience, TCS designed a programme wherein their employees also utilize their technological skills to mentor middle and high school children in a Science, Technology, Engineering, Mathematics (STEM)-focused initiative called “goIT”, which exposes children to hands-on computer science based activities in an engaging manner to spur interest in the field, specifically in underrepresented demographics.

### 3. Define and track the right indicators to assess achievement of goals

The company should also develop and track the right set of indicators and associated targets to assess a CVP's progress. High performing CVPs measure the degree to which they are achieving their goals, revise their goals based on performance, and share their performance results internally and externally.

Each goal should have an associated set of indicators and targets, which should be tracked to assess performance against the goal. For example, if the goal is to build team spirit among employees, the indicator can be the number of group volunteering activities conducted and the percentage of employees participating in group volunteering activities. Such a goal can also be assessed by having a survey question which asks employees if they experience an increased sense of camaraderie with colleagues after volunteering with them and assessing the achievement based on the percentage of respondents giving a positive response. If the goal is to enhance the community's educational status, the indicator can be the number of partner organizations supported through skill-based projects and number of hours of pro-bono service provided. Targets should be periodically revised, preferably annually.





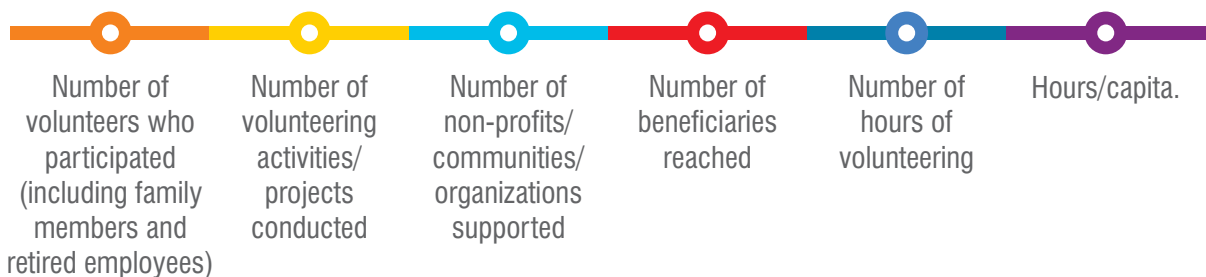
However, companies should be careful not to take away from the spirit of volunteering by focusing efforts largely on the achievement of the targets.



#### BENCHMARK

Best in class companies achieve an average of 4 hours per employee per year and involve at least 50% of employees in volunteering.

With targets in place, tracking of the same becomes critical. As a best practice, apart from goal related targets, every company should also track annually ▶



#### Hours per capita – A Group Sustainability KPI

Volunteering Hours per capita is part of the Sustainability KPIs adopted by the Tata group and needs to be reported by companies annually. Therefore, the calculation of hours per capita becomes critical. For calculating hours per capita, companies are advised to use the following guidelines:



**Volunteering Hours per capita = Total volunteering hours of the company during the year / Total employee strength of the company during the year.**

#### Arriving at 'Total volunteering hours of the company'

- Total volunteering hours put in by employees, family members and retired employees on activities facilitated by the company or supported by the company, including Tata Volunteering Week activities and ProEngage & Engage+ projects
- Hours can include volunteering done by your employees / family members / retired employees by participating in activities arranged by other Tata companies as well
- Hours can include employee volunteering in personal capacity. However you should recognise their initiative by appreciating them, giving certificate of recognition, etc. Recognition should never be connected to appraisals or performance bonus. The recognition should never be in monetary terms
- Volunteering hours will include only the duration of the volunteering. Travel time for the volunteering will be excluded.
- Similarly, any training / orientation required for the volunteering will not be included in volunteering hours.

## Arriving at 'Total employee strength'

- For a given year, the company can take the average of employee strength at the beginning of the year and at the end of the year. If both numbers are not available for any reason, either number can be taken. However, this practice should be avoided as much as possible
- Total employee strength will include all categories of employees eligible to volunteer in the company's volunteering activities / programme. For instance, if contract staff are eligible to participate, then no. of contract staff will have to be added to the employee strength. Similarly, if any employee group is not eligible to volunteer, their number should be subtracted from employee strength.

Results of such performance tracking can be used to generate significant support and buy-in from top management as well as build the company's brand through external communication efforts.

Businesses are seeking easier and more advanced means of tracking and reporting the progress of CVPs, especially for companies with multi-office locations that are often asked to keep records and report to their national headquarters. Tracking tools can range from a basic Excel spreadsheet that is managed by one person or placed on a shared network drive to a third party software programme that can be customized for your company. Some large companies have their various locations do the tracking and then report to the national staff while others have company-wide systems. An increasing number of companies (such as TCS) have developed their own web-based tracking system on their intranet.

The Tata Engage website provides an easy way to track volunteering activities and hours. Every company Single Point of Contact (SPOC) can add an activity being conducted by the company. Post the completion of the activity, the 'number of volunteers' and 'hours per volunteer' can also be added. The website also provides a dashboard of performance in terms of volunteers and hours of volunteering. At the end of the year or even on a quarterly basis, the SPOC can export the excel file of all activities uploaded by locational SPOCs of that company and get a comprehensive view of the company's overall performance. Monthly or quarterly summary reports are also great to share with external stakeholders in the local community as they demonstrate the company's and its employees' commitment to its communities.



BEST  
PRACTICE

For tracking purposes, a company should be clear on whether travel time should be included in volunteering hours. As a Tata group standard, volunteering hours will include only the duration of the volunteering. Travel time for volunteering will be excluded. Similarly, any training / orientation required for volunteering will not be included in volunteering hours.





Tata Technologies tracks volunteering performance and KPIs using excel sheets. The template is well defined and made available to all locations. Champions at all locations are trained on how to maintain the excel files and requested to keep it updated real time. Collation at a company level is done by simply merging all these excel sheets. The structure of the excel file is shown below. This example illustrates that information can be well managed even in the absence of an online system or MIS.

Tata Technologies Excel for tracking volunteering performance:

INITIATIVE								
Please give details of the activity. Activity type will be selected as per the definition of PPP. In case the activity is a part of a larger project, please mention the same under the name as well as description. This will help distinguish all the sub activities of a large project								
Activity	Activity Type (People / Planet / Progress)	Description of the activity (brief)	Date	Month	Center	City	Country	
ORGANISATION SUPPORT								
This will record the financial break up for each activity. For a larger activities with sub activity, please insert the approved annual budget only once. USD								
Approved budget	Direct expenditure on activity - Company funds	Overheads of activity Expenditure - Company funds	Amount spent for activity given to implementation agency (NGO)	Contributions and support during crisis (exceptional budget)				
EMPLOYEE PARTICIPATION								
This will record the cash/kind and time donation from the employee volunteers								
Material contributions (type/kind and its unit)	Quantity of material contributed (kgs/liters/number, etc)	Employee contribution in Skill (please mention the skill - software, design, etc)	Employee Contribution in Cash to activity/crisis (USD)	No. of employees donated material	No. of employees donated financially	No. of employees volunteered time (including skill, organisers)	Hrs. of volunteering required for the activity	Total number of volunteering hrs (no. of employees X Hrs. of volunteering time)
IMPACT								
This will help record the beneficiaries impacted. Lives touched impact will occur when an activity has an immediate, short term impact. Lives impacted will mean a substantial long term impacted created through kind/training								
Type of beneficiary (women, students children, community, etc.)	Lives TOUCHED (no.)	Lives IMPACTED (no.)	No. of Trees PLANTED and MAINTAINED (no.)					
OUTREACH								
This is to record the % of employees that were sensitised through communication of an activity								
Communication medium used	No. of Mailers* (Pre and post the event)	% of employee reached out						
PARTNERSHIP								
This is to record the partner who will assist us in implementing the activity on the ground								
Name(s) of NGO / Partner	Total no. of NGO / Partner involved	NGO / Partner count (count only new partners)						
AUDIT								
Documentation Proof - NGO / partner documents as per due diligence, activity / donation letters from Partners, letters from institutes, Pictures, audit letters, waste recycling certificates, etc.								
Submitted Documents (mention the nature of document)				Awaited documents / Why no document is maintained				

## 4. Have an approved volunteering policy

A written volunteering policy demonstrates the support and commitment of the company. Formal structure and policies are necessary for establishing the scope and parameters within which employee volunteering programmes operate and are organized. The guidelines and policies must answer questions like:

- Which employees are eligible to participate?
- What is the nature of company support available to volunteers?
- When can employees participate and for how long?

For more details on how to develop a volunteering policy, please refer to the section “What should a volunteering policy contain?”

## 5. Ensure ownership and involvement across all levels

Leaders who set an example by volunteering themselves and encouraging their teams to volunteer contribute significantly to the success of a CVP. Senior leaders should actively drive volunteering by adopting ambitious targets and encouraging volunteering throughout the year. They should personally undertake regular volunteering engagements, and lead by example. However, they must be cautious to not cross the line where the employee feels obligated to carry out an activity because the boss expects it and thereby does not exercise free will.

However, leadership involvement alone is not always sufficient. Team leads across the company should also be supportive of their team with respect to volunteering. At the same time, employees who wish to volunteer should have the option of giving inputs and feedback on decisions regarding volunteering initiatives.

It is also imperative to allow employees across all levels to participate without prejudice. Any employee who wishes to participate should be encouraged, irrespective of the person's level and performance. However, there can be some exceptions. For example, paid secondments to a partner organization are typically open only to top performers (and not to all employees), and/or certain grades within the company and/or employees with a certain minimum number of years of work experience.

Companies are encouraged go beyond employees and extend volunteering initiatives to ▶

Employees' families

Retired employees

Contract employees

Value chain partners – like vendors or distributors.



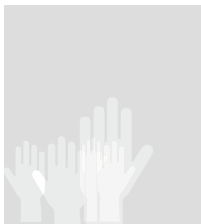


Tata Motors engages retired employees, family members and value chain partners in a big way. They have a database and inform them of every volunteering activity so that they can participate in them.

## 6. Strike the right partnerships

High-performing CVPs understand the importance of strategic partnerships and collaboration with government and partner organizations. A company should create an evolving roster of volunteering partner organizations and causes it would like to work with. It is important that causes and partner organizations are identified based on the employees' interests, their strategic fit with business, and their alignment to the company's CSR programmes and volunteering goals. The choice of partner organizations should be made keeping in mind their ability and capacity of the partner organization to take on and manage corporate volunteers.

Partner organizations could be non-profits that are supported through the company's CSR programmes, social enterprises, local bodies like municipalities, traffic police, hospitals, schools, blood banks, etc. Companies could also choose to work with partner organizations that are not their CSR programme partners, but are doing good work, aligned to the company's / volunteers' interests and have strong volunteer management expertise. Some companies may also choose to work with specialized agencies that manage corporate volunteering programmes, thereby reducing the company's burden of managing and tracking volunteering activities.



**Volunteering partner organisation:** 'Any organization being supported by a Tata company through a volunteering activity / project, including non-profits, social enterprises, government departments, schools, hospitals, blood banks, local authorities like traffic police, municipalities, etc.'



TIP

While identifying volunteering partner organizations to work with, companies can log into [www.tatasustainability.com](http://www.tatasustainability.com) and access the repository of non-profits. This is a collation of non-profits who have worked with a Tata company or any other well-known donor agency and have been recommended by these agencies as credible non-profits to work with. Users can filter non-profits by Location, Beneficiary, Focus area, etc., and also see which well-known company / agency the non-profit has worked with in the past.



During selection of partner organizations for volunteering, the company could employ some of the principles of "Guidelines for Due-Diligence of non-profits" developed by TSG.

## 7. Offer a variety of opportunities and undertake appropriate matching of volunteers and opportunities (activities / projects)

A successful CVP caters to the needs of all employees by offering a mix of different kinds of volunteering opportunities. These include –

- **Group activities:** These tend to involve practical work which requires not so much the skills, but the time and effort of volunteers. These are generally half-day to multi-day activities and focus on completing a task. Group activities can be organized with non-profit partners, local schools, hospitals, communities, libraries, tourist spots, etc. Examples include, building a community toilet, painting a school wall, repairing a home, celebrating a child's birthday at a local orphanage, cooking a meal for residents of an old age home, tree plantation, beach cleaning, etc. These activities are covered under Tata Volunteering Week
- **Skill-based projects:** These projects require the volunteers to give a significant amount of time over a longer duration, as they contribute their professional or personal skills to help build capability of non-profits or other volunteering partner organizations. Examples include, reviewing and creating HR policies, helping develop a social media strategy, review of business plans, creating / updating website, providing MS office training to non-profit staff, providing legal inputs / expertise, taking Bharatnatyam classes for street children, etc. These activities are covered under ProEngage
- **Full-time Secondment:** Some companies enable employees to take up full-time volunteering assignments for periods ranging from 1 month to up to 2 years. During the volunteering assignment the employee may or may not be paid by the company. Some companies may pay a reduced compensation during this period. Post the assignment, the employee returns to the company in the same or a new role
- **ProBono:** It is a way of offering the professional services of the company to non-profits/communities at no cost. Companies take up social projects and allocate interested employees onto the project to be executed within the partner organization. For example, an IT company may develop a Hospital Management System for a non-profit hospital, or a law firm may offer legal advice and services to non-profits.

For each volunteering activity or project, a volunteer role should be drawn up and made clear to all volunteers. The match between the partner organization, employees and project must be right to ensure success.

Group volunteering activities do not necessarily warrant a matching of volunteers for the said activity. For such activities, a broad volunteer profile should be provided and volunteers should be trusted to apply accordingly.





For skill-based volunteering projects, the requirement should state the necessary skills, attitude, experience, language proficiency and time commitment needed to carry out the role and a thorough matching of volunteers' skills, with those required for the project, should be done.

Companies should schedule the volunteer activity days, when there are lower periods of activity in the business to minimise pressure on busy employees. Allow the programme to be as flexible as possible to ensure high participation rates.

## 8. Provide opportunities for feedback and continuous improvement

It is essential to solicit feedback from the volunteers and partner organizations, both positive and negative, as well as recommendations, on past and future initiatives in order to provide insights into how to continuously improve. Volunteers should have the opportunity to make known their views about the company's work, including its policies and procedures, and to participate in decision making. A successful corporate volunteering programme is always evolving, based on feedback received from volunteers as well as partner organizations.

An annual volunteer feedback survey may be undertaken by the company to identify opportunities for improvement. This survey may also contain questions which will enable the company to assess performance on employee related goals such as morale, team building, loyalty, happiness at the workplace, etc. Apart from the survey, volunteering coordinators / champions may constantly keep feeding in informal feedback received from volunteers during or post the volunteering activity / project. Volunteering partner organizations should also be surveyed to improve the model of engagement with them.

The company should adopt appropriate procedures for regularly reviewing the volunteer programme in light of the feedback and any other inputs (evolving regulation, internal and external best practices and benchmarks), including volunteering policy and procedure.

## 9. Allocate proper resources

Companies must budget sufficient resources so that CVPs achieve their goals. Broad budget heads could include staff for managing the programme, cost of materials required for volunteering e.g. T-shirts, caps and collaterals, orientation / training required for volunteers, monitoring and evaluation procedures, employee recognition, consultants / volunteer programme management agencies, and communication to both internal and external audiences.

A key investment for employee involvement programmes is staff, but the numbers depend on a CVP's size and scope of activities. The company should designate responsibility of managing the volunteering programme to employees within the company. The responsibilities of this team should be clearly outlined in job or role descriptions and regularly reviewed. All employees should be aware of this team and should have access to reach out to them for clarifications and feedback. As a thumb-rule, Fortune 500 companies employ one full-time paid professional for every 10,000 employees and not less than a total of two employees for managing the CVP (not organizing events).<sup>1</sup>

The company must also ensure that those who manage volunteers have the relevant knowledge and experience and are provided the necessary resources (including financial resources) and support.

<sup>1</sup> Source: BCCorporateCitizenship.org



BEST PRACTICE

In 2005, Mahindra and Mahindra Ltd. launched Esops (Employee Social Options), a platform offering employees across Mahindra Group of companies located throughout the country, a set of social work volunteering options. These options are created and implemented exclusively by employees themselves based on the needs of economically disadvantaged communities in and around their areas of operation. In this manner Esops enables the employees to give not just their wealth but also their time. To fund these employee initiatives, each Sector of the Mahindra Group donates 50% of its CSR budget

Several Tata companies including Indian Hotels, Rallis India, Tata Technologies execute volunteering programmes by designating volunteer champions at each location / SBU / division / office. The champions have their regular day-roles but volunteer to take up CVP management in their division as an add-on responsibility. Each champion is mentored by a senior corporate official. They are provided opportunities for training and exposure and are also recognized for their achievements.

## 10. Recognize performance and celebrate success

High-performing CVPs recognize, communicate and celebrate success internally and externally while continuously learning from peers, volunteers and partners and reflecting on potential programme improvements.

Companies with successful CVPs recognize their employees' efforts through a formal recognition / awards scheme. There is a need to make the company recognition programme strong and visible and let volunteers know how they are making a difference.





Employees can be surveyed as to how they might expect to be acknowledged for volunteering. The company may find that they have a preference to not be recognised in a public fashion or feel that the focus should be on the volunteering partner organization, the beneficiaries and the cause. While recognising employees for volunteering it is important to involve the employee's immediate supervisor. However, it should be kept in mind that recognition for volunteering should never be connected to appraisals, performance bonus or monetary benefits.

### Ways of recognition

- An unexpected thank you note to the volunteer from the company and / or volunteering partner organization
- Taking photos of the volunteering activity and then sharing framed pictures with the group
- Including an article about the activity carried out by the volunteer group in the partner organization newsletter or website or intranet or email / canteen boards
- A certificate of recognition / appreciation
- Awards scheme and ceremonies – Employee volunteer of the month / year, etc.
- Contribution matching - Give employees the opportunity to nominate the partner organization they volunteer for to receive a financial reward
- Appreciation in town-halls, team meetings, annual days or hosting employee appreciation days / events to recognize employee volunteer, public service, and charitable efforts. These can also be organized during National or International Volunteers Week / Day
- Personal thank you letter from the CEO / Time with CEO [Organize breakfasts, luncheons and / or dinners for outstanding employees hosted by the CEO]
- Small tokens like badges, t-shirts, mugs
- Publish case studies highlighting exceptional work / contribution.

### What NOT to do as a company when it comes to volunteering:

1. Giving cash rewards
2. Factoring volunteering into promotions, performance bonuses, etc.
3. Making volunteering a KRA for employees. Remember that volunteering is always a matter of choice and the moment it becomes a part of the employee's KRA to volunteer a certain amount of time, it is not voluntary any more. Of course, the KRAs of staff responsible for a company's CVP will have to include the overall volunteering performance of the company or function or a geography that the person is responsible for.



BEST  
PRACTICE

Tata Power has an internal awards scheme called Arpan Awards, which recognizes the volunteering performance of the various divisions of the company by inviting applications and constituting a jury to evaluate and adjudge the division with the best performance. The winning Division each year is recognized in a special function and awarded a trophy by the CEO of Tata Power.

## 11. Communicate internally and externally

Communication should include information on the various volunteering opportunities, guidelines, upcoming events and activities (i.e. what, where, when, who, and how) as well as highlights of employees' achievements and the success of past initiatives. Companies should create a robust communication campaign to inspire and motivate volunteers through multiple engagement channels. Volunteering should be included into the normal workplace experience, e.g. include information on volunteering in recruitment literature, staff inductions and internal portal. This can help to make it easier for employees to find out how and where they can volunteer and what the company offers by way of employer supported volunteering initiatives.

The company should also document and communicate company level as well as individual achievements. A progress report against goals and targets should be published periodically, at least yearly, in the annual or sustainability report.

Communication channels for both internal and external stakeholders include:

- Employee publications
- News releases
- Fact sheets
- Annual reports
- E-mail
- Bulletin boards / internal postings
- Corporate citizenship reports
- Internal and external websites
- Retail display
- Speeches and presentations by the CEO and senior management
- Employee orientation programmes
- Case studies highlighting exceptional work / contribution.





BEST PRACTICE

Tata Housing creates an annual volunteering calendar which outlines monthly volunteering activities across Tata housing locations. This calendar is made available to all employees. Volunteering events are aligned to days of national and international importance like World Environment Day, Autism Awareness Day, Women's Day, Republic Day, etc. [For a list of days of international importance, please see Annexure 5]

Tata Communications develops an online volunteering calendar which is accessible to all colleagues through the intranet.

**TATA HOUSING** **Employee Volunteering Calendar 2015-16 Mumbai** **TATA**

Date	Time	Partner NGO	Activity
16 May	11AM TO 4PM	Sparsaha Trust	Paint the Walls, Paint Happiness at Sardar Nagar, Sion
30 May	11AM TO 1PM	Sparsaha Trust	Guide the underprivileged children on educational excursion to Tarapore Aquarium at Charni Road
27 Jun	11AM TO 1PM	Shaha Sagar	Playing Team building games aimed at improving communication skills with the street children at Malad (W)
11 Jul	4PM TO 6PM	Sparsaha Trust	Health Camp and Hygiene Awareness to the underprivileged children at Kuria
25 Jul	11AM TO 1PM	Usham Community Development Centre	Puppet Making (based upon themes, followed by role play of characters made) teaching to the underprivileged children at Bandra (W)
08 Aug	8.30AM TO 12.30PM	Mumbai	Tree plantation in any of the project site on Independence Day
29 Aug	11AM TO 2PM	Infant Jesus School	Drawing and Dance Competition among the Special children at Ghatkopar (E)
12 Sept	4PM TO 6PM	Sparsaha Trust	Teaching the underprivileged children how to make Eco Friendly Ganesha at Mankhurd
26 Sept	4PM TO 6PM	Humara Foundation	Organizing Dance and Song Competition among the underprivileged children at Mumbai Central
17 Oct	1PM TO 3PM	Sparsaha Trust	A learning session among the underprivileged children on Banking services at Wadala
28 Oct	11AM TO 4PM	CO Trade World	Blood Donation Camp, Donate Blood, Save lives - Give someone the Gift of life
02 Oct to 07 Oct	10AM TO 6PM	CO, Times Tower	Joy of Giving Week including Collection of Old Newspapers, Clothes etc and handing over to the needy organization
07 Nov	2PM TO 5PM	Sparsaha Trust	Rangoli competition among the underprivileged children at KO Oakwad School, Sion
12 Dec	3PM TO 5PM	Humara Foundation	Craft and Dance Competition among the underprivileged children at Ephinstone Road
21 Nov	11AM TO 3PM	Sparsaha Trust	Class room painting games as learning aid for the underprivileged children at Sardar Nagar School, Sion
20 Feb	9AM TO 1PM	Gurukul Centre for special children	An interactive sports day with the Special Children at Ghatkopar (W)
19 Dec	4PM TO 6PM	Sparsaha Trust	Xmas day Celebration with games and activities among the underprivileged children at Mulund
16 Jan	9AM TO 5PM	Habitat For Humanity	A day well accomplished in building a poor family's home brick by brick - House Building Activity at Karjat
21 Dec to 25 Dec	10AM TO 6PM	CO, Times Tower	A Wish Tree - A special gifting day for underprivileged children on eve of Christmas
06 Feb	9AM TO 11AM	Jhansi Charitable Trust	Playing Cricket with the underprivileged children at Andheri (E)
28 Jan	10AM TO 4PM	CO Trade World	Blood Donation Camp, Donate Blood, Save lives - Give someone the Gift of life
5 Mar	11AM TO 1PM	Nayjeet	Helping the underprivileged children in Poster Making Competition at Bandra (W)
19 Mar	11AM TO 1PM	All Saints Home	Antakshri, Musical Chair, One Minute Games with the inmates of Old Aged Home at Dookyard Road

**SYNERGIZERS**  
Supporting Communities - Spreading Smiles  
www.housing.com/employeevolunteeringcalendar  
Tata Housing Synergizers Team

<p><b>15 Jun</b> 10am to 1pm</p> <p>Site: La Montana, Talegaon <b>Organizing games for children</b> La Montana Site, Chinchwad Talegaon CS Champion: Vinod Achari</p>	<p><b>17 Sept</b> 10am to 1pm</p> <p>Site: La Montana, Talegaon <b>Cleaning premises</b> Sassoon Hospital, Talegaon CS Champion: Vinod Achari</p>	<p><b>20 Dec</b> 10am to 1pm</p> <p>Site: La Montana, Talegaon <b>Cleanliness Drive at Pune Railway Station</b> CS Champion: Vinod Achari</p>	<p><b>15 Jul</b> 10am to 4pm</p> <p>Site: Veind <b>Drawing, dance and singing</b> competition among tribal students. Shri Gadge Mahara PM School, Veind. CS Champion: Kallal Lone</p>	<p><b>22 Jan</b> 9am to 2pm</p> <p>Site: Bhubaneswar <b>Recreational activity with school children</b> SCST Seipur school, Bhubaneswar CS Champion: Mukesh Das</p>	<p><b>22 Nov</b> 9am to 2pm</p> <p>Site: Bhubaneswar <b>Health Check Up</b> Govt Hospital, Bhubaneswar East CS Champion: Mukesh Das</p>
<p><b>19 Dec</b> 10am to 4pm</p> <p>Site: Veind <b>Cultural activities with tribal students</b> Shri Gadge Mahara PM School, Veind Kallal Lone</p>	<p><b>21 Apr</b> 10am to 5pm</p> <p>Site: Ahmedabad <b>Blood donation</b> Vedpat SS Hospital, Ashram Road, Ahmedabad CS Champion: Ritesh Darji</p>	<p><b>27 Jul</b> 10am to 3pm</p> <p>Site: Ahmedabad <b>Spending time with mentally challenged children</b> Manav Smrut, Gandhinagar CS Champion: Ritesh Darji</p>	<p><b>06 Nov</b> 10am to 3pm</p> <p>Site: Ahmedabad <b>Spending time with physically and mentally challenged students</b> Shantaben KD Vidyamandir, Usarsai, Ahmedabad CS Champion: Ritesh Darji</p>	<p><b>11 Jul</b> 9am to 2pm</p> <p>Site: Kolkata <b>Spending time with the aged</b> Help Age India, Chetia, Kolkata CS Champion: Mhr K Dutta</p>	
<p><b>26 Jan</b> 10am to 3pm</p> <p>Site: Ahmedabad <b>Republic day celebration</b> Khatraj Primary School, Gandhinagar CS Champion: Ritesh Darji</p>	<p><b>15 Aug</b> 7am to 11pm</p> <p>Site: Bolar <b>School stationary distribution</b> ZP primary school, Betegaon Bolar CS Champion: Anil Bhor</p>	<p><b>15 Oct</b> 10am to 5pm</p> <p>Site: Bolar <b>Spending time with the aged</b> Old Age Home, Kolve Road, Palghar, Bolar CS Champion: Anil Bhor</p>	<p><b>25 Jul</b> 10am to 5pm</p> <p>Site: Awaza, Mulund <b>Picnic with the slum children</b> Sparsh Charitable Trust NGO, Karjat CS Champion: Vishal Shingote</p>	<p><b>12 Sept</b> 4pm to 7pm</p> <p>Site: Kolkata <b>Quiz competition &amp; recreational activity</b> Parasar NGO, Moulati, Kolkata CS Champion: Mhr K Dutta</p>	
<p><b>22 Aug</b> 10am to 5pm</p> <p>Site: Awaza, Mulund <b>Education and health awareness</b> Yash Govt School, Thane CS Champion: Vishal Shingote</p>	<p><b>14 Jul</b> 11am to 2pm</p> <p>Site: Prive, Lonavala <b>Activity with disabled children</b> Sampark NGO, Lonavala CS Champion: Gulam Nabi Kurte</p>	<p><b>07 Nov</b> 4pm to 7pm</p> <p>Site: Amantra, Kalyan <b>Recreational activity with orphan children</b> Ma-Niketan Orphanage, Thane West CS Champion: Intiyaz Shaikh</p>	<p><b>09 Jan</b> 10am to 3pm</p> <p>Site: Amantra, Kalyan <b>Activity with the dumb and deaf children</b> Nekota school, Bhiwand MIDC Kalyan CS Champion: Intiyaz Shaikh</p>	<p><b>30 May</b> 9am to 5pm</p> <p>Site: Amantra, Kalyan <b>Volunteering activity</b> Apte Village, Tilwala Kalyan West CS Champion: Intiyaz Shaikh</p>	<p><b>14 Aug</b> 10am to 1pm</p> <p>Site: Avenida, Kolkata <b>Tree plantation and awareness on environment</b> Avenida, Kolkata CS Champion: Sankar Chakraborty</p>
<p><b>12 Aug</b> 3pm to 5pm</p> <p>Site: Pimant, Gurgaon <b>Water Conservation Activity</b> Navyoti Foundation Gurgaon CS Champion: Parag Singh</p>	<p><b>16 Oct</b> 3pm to 5pm</p> <p>Site: Pimant, Gurgaon <b>Educational awareness on vocational training for the youth</b> NET Foundation Gurgaon CS Champion: Parag Singh</p>	<p><b>25 Jul</b> 11am to 7pm</p> <p>Site: Pimant, Gurgaon <b>Sports and recreational activity</b> Govt. Govt. School, Naraina P.D.S. Market CS Champion: Abhishek Sharma</p>	<p><b>15 Jul</b> 10am to 5pm</p> <p>Site: Mambakkam <b>Drawing Competition</b> Adi Dravidar SCST Middle School, Meerkottayur. CS Champion: Senthil Kumar</p>	<p><b>17 Sep</b> 9am to 6pm</p> <p>Site: Mambakkam <b>Craft competition and distribution of books to orphan children</b> Child Care Foundation, Mambakkam CS Champion: Senthil Kumar</p>	<p><b>12 Oct</b> 10am to 4pm</p> <p>Site: Avenida, Kolkata <b>Medical camp and eye checkup for poor villagers</b> Avenida, Kolkata CS Champion: Sankar Chakraborty</p>
<p><b>14 Nov</b> 11am to 7pm</p> <p>Site: Mst, Kasauli <b>Students' competition &amp; annual day celebration</b> Chaghat Sen Sec School, Kasauli CS Champion: Vinod Kumar Sharma</p>	<p><b>19 Sept</b> 2pm to 6pm</p> <p>Site: Sector 113, Gurgaon <b>Cleanliness drive in the community</b> Village Baghiana, Gurgaon CS Champion: Shyamal Kant</p>	<p><b>13 Feb</b> 2pm to 6pm</p> <p>Site: Sector 113, Gurgaon <b>Recreational activity with school children</b> Village Baghiana, Gurgaon CS Champion: Shyamal Kant</p>	<p><b>14 Aug</b> 10am to 5pm</p> <p>Site: Kuthambakkam <b>Cleanliness drive</b> Govt High School, Kuthambakkam CS Champion: Suresh Subramaniam</p>	<p><b>15 Mar</b> 10am to 1pm</p> <p>Site: Kuthambakkam <b>Health check up at community health centre</b> Kuthambakkam CS Champion: Suresh Subramaniam</p>	<p><b>12 Sept</b> 10am to 2pm</p> <p>Site: Bangalore <b>Spending time with the disabled</b> Mindra, Bangalore CS Champion: Uma Saadhavan</p>
<p><b>21 Dec</b> 10am to 2pm</p> <p>Site: Arabella, Sohna City <b>Tree plantation at site</b> Sohna City CS Champion: Pranav Kumar</p>	<p><b>04 Jan</b> 10am to 11am</p> <p>Site: Arabella, Sohna City <b>Crickit match with disabled children</b> Rikar Homes, Okha CS Champion: Pranav Kumar</p>	<p><b>19 Sept</b> 9am to 6pm</p> <p>Site: Bangalore <b>Visit to old age home</b> Wudharsham Bangalore CS Champion: Uma Saadhavan</p>	<p><b>26 Sept</b> 10am to 5pm</p> <p>Site: Bangalore <b>Recreational activity with orphan children</b> Manning Stn, Bangalore CS Champion: Uma Saadhavan</p>		

Tata Housing  
Synergizers Team





Presenting the revamped Tata engage online Employee Volunteer Calendar, which gives you an opportunity to lend a helping hand towards a worthy cause as a part of our global family.

Go through the calendar and volunteer for the causes you wish to be involved in.



For more details on volunteering you can contact our EVP team on [evp.communications@tatacommunications.com](mailto:evp.communications@tatacommunications.com)



BEST PRACTICE

### Example of effective use of feedback, tracking and communication – HP Scorecard

HP has built a Social Impact Scorecard that measures how its 300,000 employees in 170+ countries embrace the company's "local knows best" philosophy of corporate volunteering. The survey's quantitative and qualitative sections measure how participation in the CVP increases employee morale, one of the outcome goals contained in the CVP's annual plan. Every HP employee can use four hours per month of paid work time to volunteer. Employees have incentivized ways to log hours, including earning a small grant for their non-profit by logging their hours. HP also collects feedback from non-profits regarding the impact of HP's volunteering, particularly in terms of increasing their capacity. HP asks, were they able to serve more people, offer higher quality services, or stay open more hours? When evaluating hours and impact, HP monetizes the social benefits of volunteering, which added up to \$85 million US last fiscal year. This measurement is based on an awareness that volunteer hours aren't created equal. HP's measurement takes a shared-value approach with non-profit organizations, valuing hands-on work at \$20 US per hour and skills-based, pro bono work at \$150 US per hour. Hands-on work might mean an employee walks dogs for a shelter for a few hours; skills-based work might mean an employee spends a few hours creating a financial plan that allows the shelter to purchase a second building. Finally, and significantly, HP measures the relationship between employees' morale and their participation in volunteering.



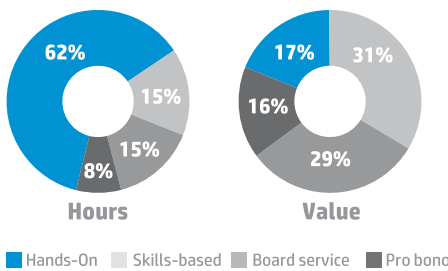
# HP Social Impact Scorecard – FY12

Social Impact is a pillar of HP Sustainability & Social Innovation. It includes employee volunteerism, disaster relief and the US employee giving program.

## Employee Volunteering

**1,441,279 Hours** / 403,071 Hours (FY11)  
**1,814,536 Hours including Retirees** 744,289 Hours (FY11)

**US\$ 85,189,030** / US\$ 25,868,130 (FY11)  
**Value of Volunteer Hours Donated<sup>1</sup>**



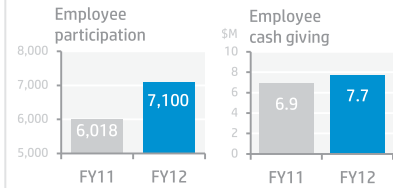
■ Hands-On ■ Skills-based ■ Board service ■ Pro bono

1. Hourly rate based on type of volunteering: \$150/hour for Board, Service Corp, Pro Bono and Skills-based; \$20/hour for Hands-on and undetermined, adjusted using International Monetary Fund (IMF) data for purchasing power differences across countries.

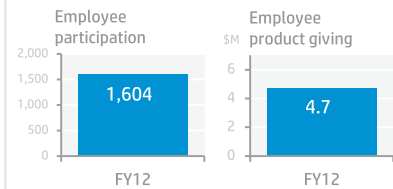
Education & literacy	40.7%
Health	23.2%
Children & Youth	13.8%
Environment	10.3%
Community	6.9%
Homeless & Housing	1.7%
Disabilities	1.2%
Computer & Technology	0.8%
Disaster Relief	0.8%
Mentoring	0.6%
Race/Gender Issues	0.1%

## US Employee Giving

### Cash matching campaign

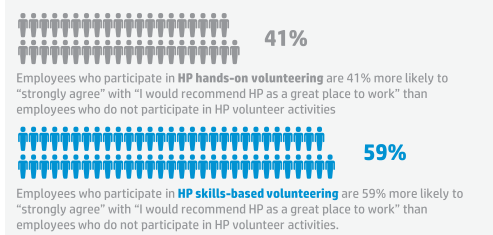


### Product giving campaign



## Business Impact

Increased employee morale<sup>2</sup>

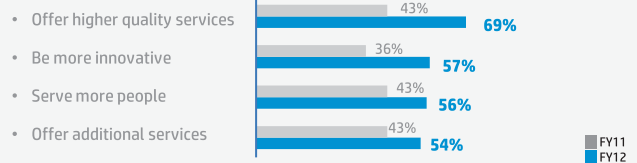


2. Employee Survey on Volunteering, 20,002 respondents globally, October 2012.

## Social Impact

Increased nonprofit capacity<sup>3</sup>

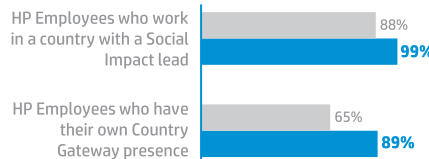
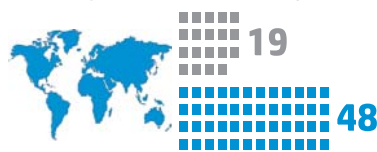
89% of surveyed nonprofits reported that HP employee volunteer contributions "very significantly" helped them build their capacity in one or more of the following ways:



3. Nonprofit Partner Feedback Survey, 102 (FY12) and 15 (FY11) respondents.

## Country Leadership

Social Impact Portal with Country Gateways

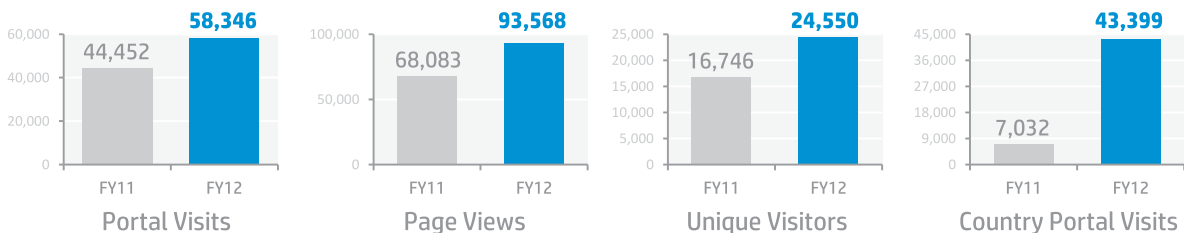


## Disaster Relief

Events	Grants	Cash Match
7	\$550k	\$265k

## Digital Engagement

Social Impact portal



Data from Employee Survey on Volunteering (20,002 respondents globally) + YourCause Volunteer users.

## Brand and Communication guidelines

In most Tata group companies, brand and communication is typically the responsibility of the Corporate Communications team. However, the nature of volunteering is such that it may require the CSR or Volunteering team also to use the brand and communicate externally in some cases. A broad set of guidelines is provided below, which will help CSR and Volunteering teams to ensure they are not caught on the wrong foot.

- Ideally, the CSR / Volunteering team should work in collaboration with the Corporate Communications team. They should share the communication material like activity updates, pictures, volunteer experiences, beneficiary quotes, etc. with the Corporate Communications team, which can then use it as best suitable, for both internal and external communication
- In case the CSR / Volunteering team itself is required to manage volunteering related communication, they should understand in detail, the company's internal and external communication policy and guidelines, from the Corporate Communications team. These could include, among several other things:
  - Brand usage guidelines: The colour, size and position of the company logo and Tata logo in any internal or external communication. The team should also seek clarity on use of the logo by volunteering partner organizations like non-profits, government organizations, etc. The team should also have clarity on brand hierarchy when multiple brand logos are used in a communication collateral i.e. the prescribed size and position of each of the brand logos used such as Tata Logo, Tata Engage Logo, Tata Company Logo, TVW Logo, etc.
  - The Company's review and permission matrix for internal and external communication
  - Corporate Communication Checklist:
    - Requisite permissions need to be sought from the CSR Team, Volunteers, Volunteering Partner Organisation, Beneficiaries etc. when statements are made to the media
    - Check with Corporate Communications before sharing a Press Release for the company


- Be mindful of the nature of content, and credit given, for posts on any social media platform. Seek due permissions from the volunteer, CSR Team, Non-profit Organisation and Beneficiary before sharing their images or quotes on Twitter, LinkedIN, Facebook, Instagram and others.
- Social Media: When the company is sharing volunteer posts on social media, it is requested to use #tataengage for all TVW and ProEngage related posts, along with all company specific hashtags
- Please ensure that sensitive information and pictures are not posted externally, such as
  - Details of a volunteering partner organization with whom a confidentiality agreement has been signed. This is especially applicable for skill-based, longer term volunteering assignments (like under ProEngage)
  - Pictures of vulnerable groups of beneficiaries like HIV affected persons, victims of heinous crimes, prison inmates, etc.
- While profiling volunteers and using their pictures and stories in the communication campaign, seek their permission. For a sample photo consent form, please see Annexure 6
- Don't use pictures and music without copyright / licences
- When in doubt about anything, please check with your Corporate Communications team and / or Tata Engage team before taking any action.





What should a volunteering  
policy contain?





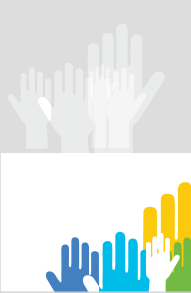
A corporate volunteering policy expresses the business' commitment to encouraging its employees to volunteer. A written policy formalises the activity and communicates to the employees the intentions and objectives of the business. It also provides guidelines and procedures for the programme's operations.

When drafting a policy, consider the following

- 1. State the goals** and include a statement as to why the business has chosen to support the community in this way i.e. by encouraging employee volunteering.
- 2. State the programme structure**
  - a. When and how volunteering opportunities will be made available
  - b. What types of volunteering activities will be provided
  - c. How the company will align to Tata Engage. Will the company celebrate Tata Volunteering Weeks? If so, which editions? March or September or both? Will the company encourage participation in ProEngage? If so, is the company going to give two working days off per quarter to ProEngage volunteers? Will the company participate in Engage+? If so, does it have in place an appropriate sabbatical/ deputation policy in place?
- 3. State the guidelines on selecting volunteering partner organizations** and will there be any exclusions
- 4. State who can participate in the programme.** Employees, contract staff, family members, friends, retired employees, temporary staff. Some company's exclude certain employee groups from volunteering initiatives, such as poor performers or new-recruits, etc. This is a bad-practice and should be avoided. Volunteering opportunities, with the exception of paid deputations, should be available to all employees to participate in, irrespective of years in the company and / or performance rating.
- 5. State any restrictions on the types of activities staff can do**
  - a. For example, companies who wish to support non-partisan volunteering may wish to state that volunteering for religious or political organizations will not be considered as a part of the company's volunteering effort. However, employees are free to do it in their personal capacity on their own time, outside office hours.



### Working with Faith-based organizations



When it comes to faith-based organizations, as a group, we would not like to work with organizations which discriminate among their beneficiaries based on the beneficiaries' religious identity. We are open to partnering with organizations founded by religious groups, as long as they don't discriminate among their beneficiaries. For more see Annexure 7

## **6. Clarify how the company will support employee volunteering**

- a. By curating activities for the employees
- b. By giving paid time off work: As a best practice, companies should provide some paid time off work for volunteering, capped at a maximum number of hours that can be taken off. Clarity must be provided on when and how much time volunteers can take off. Specify how many days per year are allowed and also whether hours can be transferred among employees. If the company is aligning itself to ProEngage, then the company must provide two working days off in a quarter to all volunteers working on a ProEngage project
- c. By offering secondment opportunities: On the basis of employee's skills and the requirement of the community, companies may have provisions for seconding employees. This would clearly show the intent of the company and add a factor of goodwill to the company's image and brand. If the company wishes to allow deserving employees to go on a secondment (through the company's programme or Engage+), the company must include in the policy, a procedure for availing sabbatical for the purpose of volunteering, who is eligible, how long a sabbatical is allowed, how will the employee be re-integrated in the company, how will the employee's performance appraisal be done and performance linked compensation be calculated, form to be filled to request for a sabbatical and where it is available, etc.
- d. By recognizing significant contributors: Share details of the awards/ recognition scheme, if any.

## **7. Clarify if the business will support employees who volunteer in their own time. If so, how?**

Personal volunteer work done by the employee could or could not be recognised within the framework of the company's policy. This is a call the company will have to take and clarify in the policy appropriately. In case the company wishes to recognize the work done by volunteers outside of the developmental work done by company, it should specify how the employee can report the same and what will be the support provided by the company. It could either be through the matching of resources (financial contribution to the partner organization the employee supports) or the matching of time (allowing employee to take time off work to volunteer with the partner organization). If the company wishes to allow employees to volunteer with partner organizations of their own choice, as a part of the company's volunteering programme [which means that the support offered to volunteers will be applicable to them], the company must clearly state which type of partner organizations will not be supported, like political, religiously affiliated organizations, etc.

## 8. Specify where volunteers can find volunteering opportunities

- a. Typically, volunteering opportunities are made available on an internal portal. In some cases, opportunities may also be communicated through emails
- b. You may also wish to state that volunteering opportunities are available on [www.tataengage.com](http://www.tataengage.com) and that interested employees may register on the website using their official ID. Tata employees' family members and retired Tata employees can also register on the website.

## 9. Specify administrative processes that need to be followed by employees

- a. **Permissions:** Specify details of necessary permissions. E.g. All volunteers must seek permission of their line manager/ immediate supervisor. Colleagues are encouraged to assess the importance and urgency of their official work before seeking permission. Supervisors are encouraged not to decline three consecutive requests from team member. Approval should be sought on email with necessary stakeholders being copied on the mail
- b. **Logging hours:** Specify details of logging volunteering hours. The company may have a provision for volunteers to log their hours, or it may be the responsibility of the activity co-ordinator / champion
- c. **Use of office resources:** Provide clarity on whether employees can use telephones, photocopiers, printers, paper, company provided computers, meeting rooms, etc. to execute volunteering assignments
- d. **Reimbursement:** There should be a clear policy on the reimbursement of volunteers' out-of-pocket expenses such as travel expenses, childcare expenses, volunteer meals, etc. The cost of volunteering should not be a factor to discourage volunteering. As a best practice, volunteers should be reimbursed for out-of-pocket expenses incurred directly as a result of their volunteering activity. Procedures for claiming expenses should be made clear in the policy. E.g. any travel undertaken in relation to volunteering should be in line with the travel policy and charged to the appropriate cost centre
- e. **Insurance:** Provide employees with clear information on who is responsible for insurance and health and safety whilst they are volunteering. Clarity should be provided on whether the employee is covered by the company provided insurance at the time of volunteering. If not, the policy should ask every employee to be responsible for their own as well as family's safety during volunteering. All volunteers have a responsibility to ensure the safety of themselves and others around them. If necessary, volunteers can be asked to sign an undertaking to this effect.





BEST PRACTICE

A signed declaration from volunteer taking onus of his/ her own safety – Tata Motors  
SELF DECLARATION

During the volunteering activity, I shall act responsibly and sensibly towards the communities. I shall be responsible for my safety as well as safety of my family members accompanying me for the volunteering activity. I shall strictly observe Tata Code of Conduct (TCoC) during the volunteering period.

Time:

Place:

Signature:

- f. **Support Available:** Will there be any **funds or in kind support** available to contribute to the volunteering projects?
- g. **Grievance Procedures:** An employee should have the ability to communicate difficulties faced or malpractices observed while volunteering to the responsible authorities, and this requires a process (For more details, please see Section VI)
- 10. **Establish a code of conduct for volunteers:** While the company supports employee volunteering it should also set straight its expectations from volunteers who participate in the CVP. This can be done through a stated code of conduct for volunteers, to guide volunteers' behaviour, so as not to harm the company's reputation in any way. The code of conduct should be referred to in the policy and hosted on a portal or any easily accessible platform. A list of Do's and Don'ts can also be prepared and shared. It can be an evolving document, based on learnings from various volunteering events/ experiences.

### Tata Engage Code of Conduct for volunteers

#### CODE OF CONDUCT FOR VOLUNTEERS

- Volunteers must act responsibly and sensibly towards the communities
- Volunteers must take responsibility for their safety as well as safety of their family members accompanying them for the volunteering activity and follow all safety requirements outlined by the volunteering partner organization
- Volunteers should treat every individual equally and not discriminate on the basis of age, race, culture, religion, caste, disability, gender or sexuality
- Volunteers should not show any kind of affiliation to any religious or political institution
- In case any sensitive / personal information is received during volunteering hours, it should be treated as confidential

- Volunteers are advised to refrain from making statements to the media/ press without permission of the company
- Volunteers are advised to maintain proper conduct as they are representing the company. They should refrain from any activity that will affect the reputation/ image of the company or the Tata group.

### DO'S

- If a volunteer knows that one is going to miss or be late for a session, he or she should let the co-ordinator of the partner organization know well in advance. In case a volunteer wishes to leave a particular programme then the employee should give adequate notice to the concerned coordinator
- Respect and understand the local culture & milieu
- Be sure to inform the company SPOC if you have signed a confidentiality agreement with the volunteering partner organization. The CSR / volunteering team will then be aware of the details of the activity / assignment, including pictures which may not be used for internal / external communication.


### DON'TS

- Volunteers should not promise anything to the volunteering partner organization/ beneficiaries on behalf of the Tata company
- Don't make commitments you may find difficult to keep
- Volunteers should not expect recognition from company for a personal monetary or in-kind contribution they make
- In volunteering activities requiring distribution of goods to beneficiaries, the volunteers should maintain the dignity of the recipients and hand out the goods in the beneficiaries' hands and not throw the same at them
- Volunteers are advised to take permission of the volunteering partner organization and the beneficiaries before taking photographs / videos at the volunteering venue
- Volunteers are advised to avoid smoking at or around the venue of a volunteering activity or loiter around the venue after the activity is complete.



# How to curate and execute a volunteering activity/project





This section is specifically for volunteering SPOCs and other employees who have been designated with the task of curating and managing volunteering activities.

### **Curating the activity**

In order to curate a volunteering activity or project, a SPOC needs to identify the cause upon that the company wants to work upon or the partner organization the company wishes to support. This will stem from the reason why the company is undertaking this activity. It could be as a part of Tata Volunteering Week (TVW) or could be a theme based activity like World Environment Day, Children's Day, etc. The SPOC could also consult with regular volunteers from the company on the kind of activities they would be interested in. Based on the nature of the activity, the SPOC may both work with a volunteering partner organization (non-profit, school, hospital, local community, etc.) or design and execute the activity on his/her own. Some volunteers could also be included in the planning and execution of the activity.

In case the company is partnering with a volunteering partner organization, the company SPOC should meet the partner organization team, explain the nature of activities to be undertaken, discuss the volunteering options available, and finalize the ones that suit both the company and the partner organization and best use the volunteers' time and skills. The SPOC may also check with the partner organization whether press/ media will be present during the activity, in which case there is a need to conform to the company protocol on this (this can be checked with the company's Corporate Communications team).

In case the SPOC is conducting the activity on his/her own, e.g. a cleanliness drive around office premises, the resources required need to be identified and necessary permissions acquired (for cleaning up at public places may require permission from the Urban Local Body or the local administration).

Once the activity / project detail is final, detail out the following:

1. Time & duration
2. Location & route map / directions
3. Schedule: Introduction to the partner organization, volunteer briefing on the activity with Do's and Don'ts, volunteering activity, group photo, vote of thanks
4. Maximum number of volunteers that can participate
5. The minimum number of volunteers required for the activity should be discussed with the volunteering partner organization. The partner organization should also be informed that if adequate number of volunteer sign-ups are not received, the activity will be cancelled. The latest date before which the activity can be cancelled should be discussed and finalized





6. Material required for the activity: Activity specific material, refreshments, t-shirts, badges, gifts for beneficiaries, etc.
7. Point of contact at the volunteering partner organization for the activity (in case of partnered activity)
8. Permission for photography / videography during the activity (in case of partnered activity). Also inform the partner organization that the photo/ video may be used on social media while seeking consent. [See sample consent form in Annexure 6]

### **Promoting the activity**

1. Design promotional material for the activity – Emailer, poster, etc. in collaboration with internal communications team, if required

Provide all necessary details on the promotional material including:

- a. Activity brief
  - b. Time, Date and Venue
  - c. Dress code
  - d. Transport arrangement
  - e. Permissions required by volunteers, as per company policy
  - f. Whether the event is open to volunteers from family as well. In case of family participation, also specify minimum age for participation, if any
  - g. Any other administrative details
  - h. Deadline for signing up
  - i. RSVP details.
3. Promote the activity well in advance (at least a week) and seek sign-ups
  4. Track sign-ups with necessary details like:
    - a. Name
    - b. Email ID
    - c. Contact number
    - d. Employee ID
    - e. Department
    - f. Designation
    - g. T-shirt size, if distributing, etc.
  5. Add activity details on [www.tataengage.com](http://www.tataengage.com). This will enable volunteers from other Tata companies to look up and participate in this activity
  6. Arrange for caps / T-shirts / banners / other material that may be required at the volunteering location, during the activity.

## PROMOTING THE ACTIVITY

- I. Increase chances of sign-ups by highlighting the positive aspects such as:
  - i. be a part of a company working to ...
  - ii. be a part of something that makes a difference
  - iii. influence the work of the partner organization
  - iv. learn new skills or use existing ones
  - v. meet new people
  - vi. help the community.
- II. You may also highlight what a volunteer may expect / learn / gain, such as:
  - i. an enjoyable experience
  - ii. being part of a motivated team
  - iii. interacting with new colleagues
  - iv. a different / new exposure.
- III. You may invite the volunteering partner organizations to conduct engagement activities to generate interest among employees e.g. speaking to potential volunteers, conduct games and more.

### During the activity

1. Reach the venue before time to prepare for arrival of volunteers – putting up banners/ standees, etc.
2. Carry a printout of the sign-ups and take attendance at the activity. Include some blank rows at the bottom of the attendance sheet for volunteers who show up without signing up
3. Follow the planned schedule – Welcome, handing out t-shirts / caps / badges, etc., introduction to partner organization, activity briefing, Do's and don'ts for volunteers
4. As the volunteers undertake the activity, take pictures, with due permission of volunteering partner organization and volunteers. Guide volunteers, as necessary
5. Upon completion of activity, give a vote of thanks to the volunteers and the volunteering partner organization. Click a group photo to commemorate the activity.

In the end, the activity co-ordinator / Single Point of Contact (SPOC) can also take spot feedback from both volunteers and the volunteering partner





BEST PRACTICE

As a practice, Tata Motors Mumbai co-ordinators form a Whatsapp group including volunteers who signed up, the co-ordinator from the volunteering partner organization and any other people involved in the arrangement of the activity. Live updates are shared on this group, like when the volunteers left from the office, when they reached the venue, directions for volunteers coming on their own, any schedule changes, drop-outs, photos of activity, vote of thanks, etc. The company also hands out personalized thank-you notes to all volunteers at the end of the activity.



### Post the activity

1. File the attendance sheet
2. Update records / MIS to reflect the details of volunteers who participated
3. Add details of 'No. of volunteers' and 'Hours per volunteer' on the Tata Engage website
4. Share pictures of the event with the volunteering partner organization as well as volunteers
5. Share pictures / videos on the Experience Hub of Tata Engage website
6. Create an update on the activity and share through appropriate channels – newsletter, intranet, emailer, social media, etc.

Post the activity, partner organizations are known to use the company's name and logo in press releases or on their website, under the 'Corporate Partners' or 'Donors' section, etc. It should be made clear to the volunteering partner organization how and where they can use the company's name and logo, as per the company's Brand policy and Media & PR policy. The company's volunteering SPOCs should clarify these things with their Corporate Communications and Brand / Media / PR functions before meeting the volunteering partner organization.

# Managing expectations and dealing with problems



Corporate Volunteering Programme is a three-way relationship, one that should benefit the volunteer, the company and the partner organization (and, through these, the community). As in any relationship all parties will have to manage expectations of the other. By being aware of these expectations all parties are more likely to have a successful partnership.

#### Volunteers are asked to

- Respect the values and aims of the organisation
- Be punctual & committed
- Be reliable and give the organisation sufficient warning if unable to attend
- Adhere to the volunteer role description provided
- Attend essential training and support sessions
- Undertake the work to a high standard
- Be honest and communicate concerns if issues or difficulties arise
- Exercise duties of care to themselves, the employer and the organisation and work to an appropriate code of conduct respecting confidentiality, safety and privacy issues
- Be professional and conduct themselves professionally as an ambassador of their employer

#### Volunteers can expect to

- Be given meaningful work to do
- Know what is expected from them
- Be offered appropriate training
- Receive supervision and support
- Get something out of the work for themselves
- Be made aware of how issues or difficulties will be dealt with, and know who to go to if there is a problem
- Be treated fairly and not to experience discrimination
- Have safe working conditions, including insurance coverage

#### Non-profits are expected to

- Ensure the volunteering experience is a rewarding one
- Have policies and procedures for volunteers, especially for dealing with issues or difficulties that may arise
- Thank and value volunteers
- Treat employee volunteers as co-workers
- Ensure appropriate information, resources, tools, training supervision and orientation has been provided to the volunteer
- Safeguard volunteers' health & safety during the activity
- Provide feedback on the volunteering activity
- Clarify and abide by the Tata company's brand usage guidelines and policies

#### Employers are expected to

- Respect the non-profit and treat them as a partner
- Make a commitment to the volunteer activity
- Arrange necessary materials required for the volunteering activity
- Identify a suitable Team Leader / Co-ordinator to liaise with the non-profit
- Release employee volunteers during agreed volunteer time
- Be open about the marketing / company visibility you want to include as part of the volunteering activity
- Follow up on employee and NGO feedback on the volunteering activity
- Be open to negative feedback about volunteers or activity from the non-profit and assess the feedback in an unbiased way

Source: Volunteer Ireland, the national volunteer development agency and a support body for all local Volunteer Centres in Ireland. Appropriately modified for the purpose of this document

The company should have in place processes and mechanisms to deal with volunteer and partner organization grievances. A structured complaint procedure sets out a clear, fair and appropriate way to address the problem, regardless of whether it's made by the volunteer or about them.

### Grievance from a volunteer

Volunteers should be advised of the procedure to use if they wish to complain about their treatment by the volunteering partner staff, volunteer co-ordinators or other volunteers. The company should have a procedure that it will follow to address different kinds of complaints, with a minimum resolution time guaranteed to the volunteer.



### A grievance procedure should outline:

- How is the grievance to be reported?
- Who is the first point of contact?
- What if that person is unavailable? Who is the next point of contact?
- What happens if the problem is not resolved at the first stage?
- Where does the final decision lie?
- Is there an option to appeal?
- How long should each stage take?
- Who is involved at each stage?
- Can the person/s continue volunteering while the complaint is being looked into?
- How will the process be recorded?

Source: Volunteer Ireland, the national volunteer development agency and a support body for all local Volunteer Centres in Ireland

### Grievance about the volunteer

Volunteers should be advised as to how the company will address situations where the volunteer has behaved inappropriately.

The complaint	Possible responses
Being late	Discuss whether the commitment the volunteer made is still manageable. The solution might be a change in hours
Not attending	Contact the person to see if there is a problem. Explain the procedure around notifying you if they can't make it in. Offer the option to take a break until the person can make the required commitment
The constant questioner	Start positive and then explain about the importance of getting on with the work and when the best time is for questions
The unofficial spokesperson	Remind the volunteer what the organization's procedure is
Appearance	It's always advisable to tell volunteers at the beginning if there is a dress code. Otherwise you have to deal with it on a personal basis
Personality clashes	Listen to both sides and consider the context and experience others have with that person(s). Consider the practical options of reassigning one person

Source: Volunteer Ireland, the national volunteer development agency and a support body for all local Volunteer Centres in Ireland

# Glossary







**Volunteering:**

Volunteering is the commitment of time and energy, for the benefit of society and the community, the environment, or individuals outside (or in addition to) one's immediate family. Volunteering is generally unpaid and undertaken freely and by choice

**Corporate  
Volunteering:**

Corporate or employer supported volunteering is the encouragement and facilitation of volunteering in the community, through the company by which an individual is employed. Typically, this involves the employee donating their time and / or expertise either during official work hours or on their own time with some facet of company support. Such structured support is often termed as a Corporate Volunteering Programme (CVP) or, Employee Volunteering Programme (EVP) or Employer Supported Volunteer Programme (ESVP). Some CVPs also encourage participation of employees' family members and retired employees in the volunteering activities supported by the company

**Group  
Volunteering:**

When a group event is organized (typically by a company) with a partner, like a local non-profit, school, hospital, community, tourist location, etc., in which volunteers participate as a group and contribute their time and effort to bring about a small change or meet an immediate need. Examples of group volunteering include a cleanliness drive at a local railway station/ beach, an awareness session on sanitation and hygiene for a school, a tree plantation drive, etc.

**Skill-based  
Volunteering:**

Skills-based volunteering is the practice of using work-related or personal knowledge and expertise in a volunteer opportunity. It is when a structured project is curated with a volunteering partner (non-profit, community based organization, social enterprise, etc.), which requires specific skills of the volunteer. Volunteers could work in teams or alone, could contribute professional skills or personal (e.g. Bharatnatyam training for adolescent girls), could work full time or part-time (on weekends), could work on company time or personal time. Typical examples of such projects are reviewing and updating HR policies for a partner organization, taking training sessions in MS Office for non-profit staff, taking etiquette and English speaking classes for youth at a non-profit, etc. When the employees' professional skills are used on company time, this kind of volunteering is also called pro-bono volunteering



## Contribution Matching

When companies support their employees' voluntary efforts with a partner organization of their own choice on personal time by matching the contribution made by the volunteer to the partner organization either in:

- a. Monetary terms: By contributing a financial grant to the partner organization, in proportion to the amount of time put in by the volunteer
- b. Time terms: By allowing the volunteer to take an equivalent or proportional time off work to work with the partner organization.



# Annexure



# 1. Evolution of a Corporate Volunteering Programme

- **Basic:**

- Employees volunteer primarily on their own time
- The company sponsors "one-off" projects
- The initiatives build employee morale but provide minimal business benefits
- The activities change every year based on which groups approach the company for its support
- The company does not formally organize or track volunteer efforts or their impact on the company.

- **Strategic**

- The company assesses employee interests, company needs, and community needs
- A strategic plan guides employee involvement by aligning company needs and employee interests with the community programme or need
- Broad internal "buy-in" for employee involvement exists within the company
- The company provides incentives for employees to participate, including matching contributions or paid time-off to work in the community
- Two-way communication concerning employee involvement between the business and employees and between the business and the community exist
- Community commitments are disclosed and promoted throughout the marketplace
- The company partners with a reputable partner organization whose strategic interests match those of the company and that has experience coordinating corporate projects.

- **Integrated**

- The company establishes long-term partnerships with non-government organizations
- Senior management and all company members actively support and engage in initiatives
- The company measures and assesses employee involvement initiatives
- The company takes a global view in defining "community," recognizing that community extends to all stakeholders who affect a company
- The company does not distinguish between "socially responsible" and "business" frameworks because it believes all activities add value to the community and business.

Source: TCC Group, New York



## 2. About Tata Engage



Tata Volunteering Week is a four week-long celebration conducted across the Tata group, twice a year. The key objective of this initiative is to encourage and inspire Tata employees to come together and participate in a volunteering activity of their choice at their respective locations.



### How we go about it

During each Tata Volunteering Week, the Tata companies across our global locations organize volunteering opportunities for volunteers of the Tata Engage community including the family members of employees and the retired employees. Volunteers typically spend half a day during TVW, carrying out volunteering work in groups. They choose their areas of interest based on a centralised pool of opportunities available on the Tata Engage Website and participate in activities organized by any Tata company. All through the week, companies drive awareness and create interest among employees.

### Role of Tata Sustainability Group

Tata Volunteering Week is initiated and driven centrally by Tata Sustainability Group through a number of channels. These include:

- Centralised theme and digital campaign collaterals
- Managing the web-platform [www.tataengage.com](http://www.tataengage.com)
- Tracking performance
- Awards scheme.

### Role of Tata companies

- Curating volunteering opportunities across company locations
- Driving the campaign internally and encouraging participation
- Sharing details on [www.tataengage.com](http://www.tataengage.com) and reporting to TSG on overall performance
- Allowing employees time off work to participate in activities.





## Who can volunteer?

- Tata employees
- Their family members
- Retired Tata employees.

Any of the above can volunteer during Tata Volunteering Week as the activities do not necessarily require volunteers to possess specialized skills.



## Schedule

Twice a year starting

- 3rd March (Founder's Day)
- 5th September (International Day of Charity)





GIVE MORE THAN JUST YOUR TIME

Each member of the Tata Engage community is acknowledged and recognised for their skills and talents. However, being a responsible corporate, the group takes the opportunity to extend these invaluable talents and apply them for the betterment of society. ProEngage is one such programme that enables us to do so.



### How we go about it

Being a diversified business group, the Tata group houses numerous pockets of excellence and expertise, from across varied disciplines and areas of interest. ProEngage is a skill-based volunteering programme that enables volunteers to lend their skills & expertise to non-profits and communities for capacity building in specialized functions like HR, Finance, Business Planning, Marketing, etc. The projects are sourced through non-profits who are registered with Tata Sustainability Group and made available on the Tata Engage website twice a year. Registered Tata Engage users (including family members and retired employees) can apply for projects of their interest. Projects go on for 1-6 months and volunteers work with the non-profits on a part-time basis on weekends, holidays and after work hours.



Volunteers who are working on their own with non-profits can also route their projects through ProEngage by uploading the project details on the Tata Engage website. In such cases, the volunteer is automatically linked with the project and the project is treated as a part of ProEngage.

### Role of Tata Sustainability Group

Tata Sustainability Group, through the Tata Engage platform, sources projects and invites volunteers to apply. The volunteering partner organizations then login to review applications and select the volunteers, based on their skills, expertise and interests and the needs of the partner organization. Before the projects start, TSG conducts a half day orientation workshop for volunteers. Post the successful completion of the project, volunteers are issued a certificate of appreciation by TSG. TSG also decides the theme and runs a central communication campaign to create awareness and drive applications.





## Role of Tata companies

- Spreading awareness and driving participation using campaign material shared by TSG
- Allowing volunteering during two official days per quarter, for employees that are selected for ProEngage projects
- Tracking project progress and reporting to TSG
- Enabling a work environment that supports an employee's decision to volunteer
- Recognising employees who go out of their way to give their time & effort for volunteering
- Ensuring complete support from senior management, as well as their participation.

## Who can volunteer?

- Tata employees
- Their family members
- Retired Tata employees.

Any of the above can volunteer for ProEngage projects. However, ProEngage projects require skill based volunteering and while applying, volunteers must ensure that they possess the requisite skills as per the project details. Selected volunteers will be provided the necessary guidance and orientation, as required. During the project execution the volunteer's progress will be tracked. After project completion, the volunteer's experience will be rated and a certificate will be awarded.

### Schedule

Projects are offered on [www.tataengage.com](http://www.tataengage.com) every six months, starting

- 15th June
- 5th December



Beyond volunteering and sharing talents for the betterment of the world, Tata Engage has curated an exclusive avenue for employee participation. Engage+ is a unique opportunity for employees who have been with the Tata group for three years, to go on a full-time paid deputation and work for a partner organization on a high-impact project and return to the company with renewed zeal and new skills.

### **How we go about it**

Through Engage+, Tata group recognises highly skilled and talented best performers and offers their skills and services to a non-profit. This highly exclusive programme is run on an annual basis, where top-performers are identified through a stringent selection process. During their time with the non-profit, the companies sponsor the employees' salary as well as their living costs.

The projects are sourced through non-profits who are registered with Tata Sustainability Group and made available on the Tata Engage website once a year. Registered Tata employees, who have been a part of Tata group for over three years can apply for projects of their interest. Projects go on for 3 to 6 months and volunteers work with the non-profits on a full time basis.

### **Role of Tata Sustainability Group**

To ensure that only the most significant projects receive the attention of this programme, the Tata Sustainability Group sources the projects and identifies their criticality. The team has to closely abide by the mandate from the group centre on the selection and process management aspects. Each Engage+ project is reviewed by a special committee of senior leaders, organized by the Tata Sustainability Group. TSG will manage a rigorous selection process and conduct a thorough volunteer orientation before start of project. TSG will assign industry experts as mentors and track progress through project execution. TSG will also conduct interim and final project review by engaging senior leadership panels and provide re-fitment support as required.



## Role of Tata companies

- Ensuring complete buy-in and support from senior management
- Promoting programme internally & ensuring this is seen as a people development exercise
- Nominating potential candidates who have served in the group for a minimum of 3 years, have a total experience of 5 years and have an acceptable performance rating
- Re-assuring volunteers of safe return & addressing all concerns on re-fitment
- Bearing entire cost of salary, living costs & compensation benefits of selected volunteers.

## Who can volunteer?

Engage+ is open only to Tata employees. Employees must meet the following criteria to be able to volunteer:

- Have worked for 5 years of which 3 years are within the Tata group
- Are high performers in current role
- Have above 'Meets expectations' rating over last 3 appraisal cycles
- Possess the business skill required for the project (will be ascertained by the selection process)

Selected volunteers will be provided the necessary guidance and sensitization training, as required. During the project execution the volunteer's progress will be tracked by mentors assigned from within the Tata group. A mid-review will also be done to assess progress. After project completion, the volunteer will have to make a presentation to a panel co-ordinated by TSG and Tata Trusts. The candidate will be given a performance rating and a certificate will be awarded.

The mentors mid-review feedback and final presentation will be considered for determining performance rating of the candidate for the relevant appraisal cycle.

### Schedule

Engage+ will be held once a year. The first Engage+ edition will be launched in 2017.





### 3. Volunteering for Disaster Response

On behalf of the Tata group, TSG is responsible for responding to disasters that occur in India and internationally. While TSG creates the response strategy, it is executed with support from Tata companies which comes in three forms viz. monetary support, material support – company products that form part of relief material and resource support in the form of volunteers.

There are three types of volunteer profiles required during Disaster Response:

- 1. Project Managers & Procurement Officers:** These volunteers are part of a trained cadre of Project Managers & Procurement Officers, who are self-nominated / nominated by the company to be trained in disaster response project management and procurement of relief material, respectively. TSG calls for nominations, undertakes a selection process and selects volunteers to become part of the project managers and procurement managers' cadre during peace time. The selected volunteers undergo a specialized training to prepare them for their role at the time of a disaster. When a disaster strikes, and the Tata group chooses to respond, these managers are called upon to manage the response / undertake procurement, subject to their availability at the time. A project manager typically volunteers for anywhere between 1 week to 12 weeks. A procurement officer may volunteer from anywhere between 1 week to 4 weeks. These are typical durations and will vary depending upon nature of disaster and scale of response
- 2. Core volunteers:** These are volunteers who are called upon to take at least one week (5 days – Monday to Friday) off from work and volunteer for a duration of at least 9 days (Weekend + 5 working days + weekend). Core volunteers are sourced in two ways. The first method employed is to send an appeal to all registered users of the Tata Engage portal, which enables volunteering for all group employees. The second method is to reach out to the CSR teams of Tata companies and request them to broadcast the appeal for volunteers throughout their company. This helps reach out to employees who are not registered on Tata Engage portal. In both cases, employees who choose to respond to the appeal are required to take permission for a 5 day leave from their manager and confirm their participation. The leave could be the employee's personal leave, or could be sponsored by the company (which is the case in majority of instances). The volunteers are then required to report to the response location, are given a short orientation by the project manager and start work on the response.



During the volunteering period, they report to the project manager. They are provided accommodation and meals and their travel costs are either absorbed by the company or the response, on a case to case basis

3. **Local volunteers:** Several times, large scale responses require large group activities, especially warehousing, organizing and kitting of relief material. The material is typically warehoused in or close to the disaster struck location. For the kitting of material, local volunteers are required, who can volunteer in half day / one day shifts and complete the task. Local volunteers are typically arranged by the project manager, in co-ordination with companies present locally.

**Recognition of volunteers:** : Project manager, procurement officers and core volunteers are recognized through certificates of appreciation signed by the Chairman / TSG head. They may also be given small gifts (typically Tata product vouchers) as a token of appreciation.

**Tracking of volunteering hours during disaster response:** The responsibility of tracking volunteer hours, company-wise lies with the Project manager and TSG team. The hours contributed are then informed to the companies to which the volunteers belong. The company may also choose to keep a track of all disaster response volunteers and the hours contributed by them.



## 4. Identification of volunteering opportunities based on core competency

Corporate competencies catering to the needs of partner organizations

Competency	Examples of volunteering opportunities
Finance Management	<ul style="list-style-type: none"> <li>• Assist in the Annual Budget Planning Projects</li> <li>• Help develop efficient accounting methods</li> <li>• Advice in financial matters</li> </ul>
Computer Skills	<ul style="list-style-type: none"> <li>• Train staff of volunteering partners</li> </ul>
Time/Office Management	<ul style="list-style-type: none"> <li>• Help develop systems that encourage efficiency</li> </ul>
Space design	Designing: <ul style="list-style-type: none"> <li>• Balwadis (nursery classes in slum areas)</li> <li>• Classrooms</li> <li>• Charity Homes, to enhance the atmosphere</li> </ul>
Product Marketing	<ul style="list-style-type: none"> <li>• Helping volunteering partners to raise funds and sell products</li> </ul>
Communications	<ul style="list-style-type: none"> <li>• Designing pamphlets, newsletters, etc.</li> </ul>
English speaking	<ul style="list-style-type: none"> <li>• English speaking classes for beneficiaries especially youth and children</li> <li>• Sessions on written communication for staff of volunteering partner</li> </ul>
Ethics and etiquettes	<ul style="list-style-type: none"> <li>• Guest lectures / special sessions for beneficiaries, especially youth and children</li> </ul>





## Indian Hotels' (Service Industry) Core-competency matrix

Competency	Examples of volunteering opportunities
Surplus Food	Distribute surplus food, the quality of which has been certified to Charitable Homes
Food Production	Conduct classes for youth and women in slums toward self-employment
Kitchen Management	Provide guidance to kitchen staff in: <ul style="list-style-type: none"> <li>• Charitable Homes</li> <li>• Hospitals</li> <li>• Remand Homes and Prisons</li> </ul>
Housekeeping	Training to: <ul style="list-style-type: none"> <li>• Home-makers in slum areas</li> <li>• Persons maintaining Charitable Homes</li> </ul>
Social and Communication Skills	Interact with: <ul style="list-style-type: none"> <li>• Youth in slums</li> <li>• Street children</li> <li>• Children in Charitable Homes</li> </ul>
Infrastructure	Identify office material that can be recycled for use by: <ul style="list-style-type: none"> <li>• Voluntary Organizations</li> <li>• Charitable Homes</li> </ul>
Event Management	Organize: <ul style="list-style-type: none"> <li>• Community celebrations of festivals</li> <li>• Celebrations / events within Institutions</li> </ul>
Nutrition and diet	Conduct classes for: <ul style="list-style-type: none"> <li>• Young mothers in slums</li> <li>• Kitchen staff in institution</li> </ul>





## Voltas's (Engineering Solutions) Core-competency matrix

Competency	Examples of volunteering opportunities
Vocational Training	<ul style="list-style-type: none"> <li>• Network with institutes and centers for vocational training to develop short term courses in air-conditioning and refrigeration for the underprivileged and training them for employment</li> <li>• Upgrade the quality of courses in air-conditioning and refrigeration</li> </ul>
Plant engineering / Erection & Commissioning	<ul style="list-style-type: none"> <li>• Assist volunteering partners to set up facilities for manufacturing products and guide them in the upkeep and running of these facilities</li> </ul>
Marketing	<ul style="list-style-type: none"> <li>• Assist volunteering partners in improving their ability to market their products</li> <li>• Assist in the process by inculcating continuous improvement in the quality of product</li> <li>• Assist volunteering partners to conduct surveys and to understand and expand their markets</li> </ul>
After Sales Service	<ul style="list-style-type: none"> <li>• Assist volunteering partners inculcate the concept of after sales service and to lay down processes which will enhance their clientele</li> </ul>
Project Management	<ul style="list-style-type: none"> <li>• To inculcate new practices and assist volunteering partners in planning project feasibility study implementation / monitoring the progress of projects to avoid time and cost over-runs</li> </ul>



## 5. Days on international importance observed by UN

JANUARY



**24th:** National Girl Child Day of India

FEBRUARY

**4th:** World Cancer Day

**11th:** International Day of Women and Girls in Science

**20th:** World Day of Social Justice



MARCH



**1st:** Zero Discrimination Day

**3rd:** World Wildlife Day

**8th:** International Women's Day

**20th:** International Day of Happiness

**21st:** International Day for the Elimination of Racial Discrimination

**21st:** World Down Syndrome Day

**21st:** International Day of Forests

**22nd:** World Water Day

APRIL



**2nd:** World Autism Awareness Day

**6th:** International Day of Sport for Development and Peace

**7th:** World Health Day (WHO)

**22nd:** International Mother Earth Day

**24 - 30th:** World Immunization Week (WHO)

**25th:** World Malaria Day (WHO)

**28th:** World Day for Safety and Health at Work

MAY

**9-10th:** World Migratory Bird Day (UNEP)

**15th:** International Day of Families

**21st:** World Day for Cultural Diversity for Dialogue and Development

**22nd:** International Day for Biological Diversity

**31st:** World No-Tobacco Day (WHO)



JUNE

WORLD ENVIRONMENT DAY



**1st:** Global Day of Parents

**5th:** World Environment Day (UNEP)

**8th:** World Oceans Day

**12th:** World Day Against Child Labour

**14th:** World Blood Donor Day (WHO)

**17th:** World Day to Combat Desertification and Drought

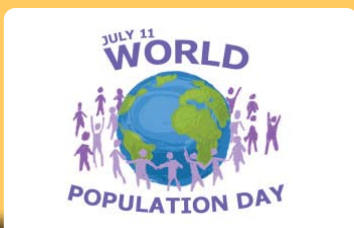
**21st:** International Day of Yoga

**23rd:** United Nations Public Service Day

**26th:** International Day against Drug Abuse and Illicit Trafficking

## JULY

- 11th:** World Population Day
- 15th:** World Youth Skills Day
- 30th:** International Day of Friendship
- 30th:** World Day against Trafficking in Persons



## AUGUST



- 12th:** International Youth Day
- 19th:** World Humanitarian Day

## SEPTEMBER

- 5th:** International Day of Charity
- 8th:** International Literacy Day (UNESCO)
- 15th:** International Day of Democracy
- 16th:** International Day for the Preservation of the Ozone Layer
- 21st:** International Day of Peace
- 27th:** World Tourism Day

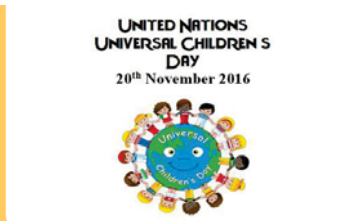


## OCTOBER

- 1st:** International Day of Older Persons
- 2nd:** International Day of Non-Violence
- 3rd:** (first Monday in Oct.) World Habitat Day
- 5th:** World Teachers' Day (UNESCO)
- 10th:** World Mental Health Day (WHO)
- 11th:** International Day of the Girl Child
- 13th:** International Day for Disaster Reduction
- 15th:** International Day of Rural Women
- 16th:** World Food Day (FAQ)
- 17th:** International Day for the Eradication of Poverty



## NOVEMBER



- 5th:** World Tsunami Awareness Day
- 6th:** International Day for Preventing the Exploitation of the Environment in War and Armed Conflict
- 10th:** World Science Day for Peace and Development
- 14th:** World Diabetes Day
- 16th:** International Day for Tolerance
- 19th:** World Toilet Day
- 20th:** Universal Children's Day
- 25th:** International Day for the Elimination of Violence against Women

## DECEMBER

- 1st:** World AIDS Day
- 3rd:** International Day of Persons with Disabilities
- 5th:** International Volunteer Day for Economic and Social Development
- 9th:** International Anti-Corruption Day
- 10th:** Human Rights Day



## 6. Sample Consent Form

### CONSENT FORM – PHOTO & VIDEO

#### **TATA SUSTAINABILITY GROUP**

By signing this release form, I hereby grant to the Tata Sustainability Group and other Tata group entities the right to reproduce, display and disseminate worldwide and in perpetuity, in any traditional or electronic media format, my likeness as shown in the photographs / videos described below:

The photographs / videos containing my likeness were taken on (date) \_\_\_\_\_ in the (location including town/country) \_\_\_\_\_ by (photographer's / videographer's name) \_\_\_\_\_.

I further confirm that these images are a true likeness of me and the images/ videos were taken with my knowledge and consent.

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Name of Subject	Age (if under 18 years)	Date	Signature
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Address and other contact information

#### **IF SUBJECT IS A CHILD UNDER 18 YEARS OF AGE:**

I confirm that I am the legal guardian of the child named above and therefore may grant permission for these photograph / videos on behalf of the child:

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Name of Legal Guardian / Relationship to Child / Date / Signature of Guardian

# 7. Working with faith-based organizations

## Background

The Tata Sustainability Group (TSG) works with partner organizations through its volunteering programmes (especially ProEngage), its work on skills via Tata STRIVE (Group CSR programme), and its disaster response work. TSG is increasingly seeking to build relationships with partner organizations of different kinds, and is being sought out by partner organizations as well.

A question that arises is – should we work with partner organizations that have a basis in religion?

This section looks at what the terms 'work with partner organizations' and 'have a basis in religion' mean, and draws out a list of alternatives to address the question.

## Two Clarifications

**'Working with partner organizations':** TSG works with partner organizations in many ways, including –

- In disaster response (in ascending order of the intensity of involvement) –
  - Coordinating – Coordinating at the state, district or area level so as to ensure no overlapping
  - Fronting – Enabling the partner organization to front a relief distribution exercise, including coordinating with beneficiaries on behalf of the Tata group
  - Working Together – Working on projects together, where the partner organization does one part and the Tata group does another for a common purpose.
  - Making grants – Making grants to partner organizations for relief or rehabilitation work
- In volunteering – placing Tata employees as volunteers in partner organizations
- In skills – using partner organizations to mobilize youth and implement skilling programmes, wherein the involvement is similar to that of disaster response (described above).



Table I: Working with Partner Organizations		
The Construct	Its Meaning	Examples
<b>Volunteering</b>	This is where we place a volunteer in the partner organization through one of our Tata Engage programmes.	The ProEngage platform requires volunteers to spend weekends for a maximum of 6 months in a partner organization. For example, several volunteers worked with Kalamandir in Jamshedpur under ProEngage.

**'Having a basis in religion':** This has the following different levels –

- Level 0 – the partner organization has no relationship with any religion or religious group, or with spirituality or spiritual group (this paper will use religion to cover both)
- Level 1 – the partner organization has a basis in religion, but this is not reflected in the recruitment of its employees or in its work. By the latter we mean –
  - It does not select beneficiaries based on their religion
  - It does not seek to convert anyone
  - It does not use religious symbols
  - There is no overt or covert discussion on religion in the course of its work
- Level 2 – the partner organization has a basis in religion, and this is reflected in the recruitment of its employees but not in its work.
- Level 3 – the partner organization's purpose is to promote a religious agenda, and its development activities are a subset of this purpose.

This is depicted with examples in the table below.

Table II: Having a Basis in Religion	
The Construct	Its Meaning
<b>Level 0</b>	The partner organization has no basis in religion and no fundamental relationship with any religious group.
<b>Level 1</b>	The partner organization has a basis in religion, but this is not reflected in its recruitment or work. It does not – <ul style="list-style-type: none"> <li>• Select beneficiaries based on their religion</li> <li>• Seek to convert anyone</li> <li>• Use religious symbols</li> <li>• Discuss religion in the course of its work</li> </ul>



<b>Level 2</b>	The partner organization has a basis in religion, and this is reflected in its recruitment but not in its work.
<b>Level 3</b>	The partner organization's purpose is to promote a religious agenda, and its social development related activities are a subset of this purpose.

<b>Table III: Should the Tata group work with them?</b>				
<b>The nature of relationship</b>	<b>The partner organization</b>			
	<b>Level 0</b>	<b>Level 1</b>	<b>Level 2</b>	<b>Level 3</b>
<b>Making Grants</b>	Yes	Yes	No	No
<b>Placing Volunteers</b>	Yes	Yes – but only if the volunteer is comfortable	No	No



## References

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4. [www.volunteer.ie](http://www.volunteer.ie)

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