

Welcome

Employee Service & Giving Makes Sense

Getting Started

Expanding Your Program

Skills-based Volunteering

Helpful Resources

Celebrate Colleagues

Tell Your Stories

Looking Ahead

About Harvard Pilgrim and the Foundation

Supporting Documents



Making Good Happen 2:

a guide to building an employee service and giving program



● **It has been an unprecedented chapter in the story of corporate giving and service.** As we brought together the Harvard Pilgrim Health Care Foundation and Common Impact to edit the second edition of *Making Good Happen*, the COVID-19 epidemic hit and knocked us all to our separate corners. Yet, it was no surprise that our teams and our corporate colleagues pivoted quickly to “virtual” projects and programs assisting our communities to regroup and recover. Our decade of connecting with communities and putting our corporate values into practice gave us the capacity to create and reinvent.

Our new edition again offers some basic starting points and principles from Harvard Pilgrim’s programs, and adds a deeper dive into skilled volunteerism – one of the fastest growing corporate giving programs – through our partnership with Common Impact, a nonprofit that pioneered skilled volunteering. Common Impact’s approach breaks down barriers that exist between sectors and industries to create meaningful partnerships between companies, social sector organizations and the people that drive them. The results deliver real value to each partner through innovations in community engagement, and ultimately, solutions to deeply rooted and complex social challenges.

The guide is organized as a “how to,” in short chapters that track our experiences and the “learnings” from our programs. There’s nothing sacred to the order; start where you can and soon you’ll be building on what we’ve done to forge your own game plan. The rewards for your unique efforts, no matter how small at the start, will be amazing: from recruiting and retaining top talent, to boosting your company’s brand and reputation, to creating a powerful “esprit de corps” among staff who otherwise might never come together. Most importantly, you’ll be joining a growing group of businesses nationally and globally who know it’s not enough just to succeed financially. If we’re all going to prosper together, corporate service and giving will be pivotal in making the world a better and equal place for all.

Beyond the guide, we’re here to help. We encourage you to reach out to us, and we’ll share our experiences and advice as you navigate your own programs. Please be in touch with how you use this resource, and what you accomplish.

Best,

Karen Voci

President, Harvard Pilgrim Foundation

Danielle Holly

CEO, Common Impact

EMPLOYEE SERVICE AND GIVING MAKES SENSE

So just what is an Employee Service and Giving program? It's a corporate-led initiative that enables staff to give their own personal time, talents and resources to causes and nonprofit organizations through two distinct avenues:

- **Service:** including volunteer days, signature volunteer programs, skills-based volunteer projects and board service
- **Giving:** including charitable drives, fundraising campaigns and matching grant programs

Supporting employee-driven service and giving is a smart business strategy. In a market saturated by competitors, it can be challenging to differentiate your brand among other businesses, and your company as an employer of choice for new hires. Employee Service and Giving programs can set you apart to consumers and help you attract talented recruits and retain employees. Giving back just makes sense – for your colleagues, your company and your community. There is proof in the numbers as you can see from these Cone Communications' employee engagement survey reports from 2015–16:

- **91%** of consumers expect companies to operate responsibly to address social and environmental issues
- **88%** of global consumers agree that a company can take specific actions to both increase profits and improve the economic and social conditions in their communities
- **74%** of employees surveyed say their job is more fulfilling when their employer provides opportunities for them to make a positive impact
- **70%** of employees say they would be more loyal to a company that helps them contribute to important issues
- **58%** of job candidates consider a company's social and environmental commitments when deciding where to work
- **55%** of job candidates say they would work for a socially responsible company, even if the salary was less

So we know there is much to gain by engaging employees in community service. Ready to begin your program? Let's go!

GETTING STARTED



We started off on a very small scale by joining an Earth Day park clean up organized by another organization. Yet, seeing the real-world impact of our collective actions in one place inspired and energized us. We went from holding sporadic volunteer and giving activities to formalizing and expanding our approach, including creating a position to oversee all staff service and giving, as well as establishing company-wide service days and personal giving opportunities.

Over the next three years, the program grew to include a corporate service day in each major market where Harvard Pilgrim does business, wider use of the Mini-Grant program – where all staff are eligible to give \$500 to the charity of their choice, annually, from Harvard Pilgrim’s Foundation – as well a substantial increase in overall participation in service and giving activities.

We did it by ...

- Seeking feedback, insight and support from leadership and management
- Creating new corporate policies to provide clarity and guidance
- Establishing a solid infrastructure

As with any new initiative, it took time to create a model that worked best for our organization and our culture. Looking back, this building period was a vital part of our current program’s success. Here are some lessons we learned along the way.

got mini-grant?

Annually, each Harvard Pilgrim employee can direct up to \$500 in a Foundation-funded grant to a local nonprofit of his or her choice.

1. Start Small

You may feel like jumping in with both feet, creating all sorts of volunteer events, charitable drives and fundraising campaigns to support local communities. While that's tempting, we have learned that building on existing programs while slowly and methodically adding new ones works best.

- 1 **Start by taking an inventory** of your existing programs.
- 2 **Separate them into the categories of Service and Giving**, noting how often these activities occur and how many employees are involved.
- 3 **Use this information to guide your decisions** on how to proceed.

Regardless of where you start, remember you don't have to do it all at once. When building our program, we focused on enhancing one giving program at a time, while building out service and volunteer activities slowly across markets and departments one by one.

SERVICE



- On-site service projects
- Skills-based volunteering
- Board service
- Volunteer days (corporate, department, individual)

- Charitable drives
- Dollar matching
- Fundraising campaigns
- Dollars for Doers

GIVING



2. Get Company Leaders on Board

Leadership support at all levels of your organization is vital to a successful Service and Giving program. At Harvard Pilgrim, we met with leaders across the company, asked them what they knew about the existing program and sought their input on how it could grow, as well as asking about any potential barriers they foresaw. By seeking their advice and inviting them into the process, we gained allies before we even launched.



3. Establish an Employee Committee

Employee Advisory Committees can provide direction and guidance on Employee Service and Giving initiatives and serve as your ambassadors. Think of the group as your eyes and ears in the company and community.

- Invite employees from all levels and all departments of your organization.
- Recruit those people already involved in charitable work – the colleague who runs the holiday drive or the co-worker who volunteers at the local food pantry. They will be your best advocates.
- Use this group to test new ideas, pilot new programs and get feedback.
- Keep teammates engaged – meet with the group up to four times a year.

4. Identify Dedicated Staff and Program Goals

Service and Giving departments within companies take on many shapes, names and sizes. While having a full-time staff is ideal to oversee and manage the program, we know that many organizations aren't able to dedicate such resources. If that's your dilemma, identify someone within the organization who will be accountable for the program, and build in specific goals. Program goals can include:

- Achieve 90% participation in a day of service
- Have a quarterly, on-site volunteer project
- Have every department volunteer once per year
- Build a Dollars for Doers Program, where a company provides grants to nonprofits where employees and retirees volunteer on a regular basis
- Create a service event at the company's annual gathering

5. Create Infrastructure

The backbone of your new initiative will be the policies and procedures you put in place. For instance, how will you handle time off, track volunteer hours and contributions, and supervise giving programs? These details need to be addressed before you launch. Get help from your human resources, legal and finance departments. And don't worry, you don't have to reinvent the wheel – check out Harvard Pilgrim's paid time off policy and giving protocols in the "Supporting Documents" section (page 17), and you can find additional examples online.

Depending on the size of your organization, here are potential partners and the roles they can play in your program's development:



Before You Start

Human Resources

Build or review volunteer time-off and giving policies

Legal

Review policies and advise on risks

Risk Management & Insurance

Determine insurance requirements



Roll Out

Marketing

Build a volunteer program brand and develop creative pieces

Public Relations

Build external brand and communication plans



Evaluation

Human Resources

Provide employee engagement statistics through employee satisfaction surveys, recruitment surveys and exit interviews

THE CHALLENGE:

The head of a 200-person call center at Harvard Pilgrim wanted to engage her staff and increase morale by getting involved in our Service and Giving program. She worried, however, about staffing shortages if employees were allowed to take time off to volunteer.

THE ANSWER:

We created service opportunities that were designed for her staff, including activities for small groups, as well as a department-wide activity that took place on-site during a scheduled phone down time.

EXPANDING YOUR PROGRAM

Once you have a thriving Employee Service and Giving program, here are some next steps.

1. Design Signature Programs and Initiatives

You want a program that reflects your company, either through your brand or your culture. And it needs to be relevant for your customers.

Here at Harvard Pilgrim, our Foundation focuses on increasing access to healthy food, a natural fit for a health care company. Using the "Building Healthy Communities" brand, our service days are spent building raised garden beds, conducting healthy eating workshops and creating murals with inspiring healthy eating messages.

The results have been tangible:

- Higher employee volunteer attendance
- Better employee understanding of our Foundation's mission
- Clearer and more comprehensive external message



Welcome	Employee Service & Giving Makes Sense	Getting Started	Expanding Your Program	Skills-based Volunteering	Helpful Resources
	Celebrate Colleagues	Tell Your Stories	Looking Ahead	About Harvard Pilgrim and the Foundation	Supporting Documents

2. Chart Outcomes

Getting honest feedback is an important step in building a strong Service and Giving program. How and what you measure will vary depending on your company’s priorities and tools, but the results will help you understand and show how your program is making a difference, as well as highlight areas in need of improvement.

Some ideas:

- **Survey participants** – employees and community partners – especially after big events
- **Listen to your advisory committee** – they are your eyes and ears and most valuable resource
- If your company uses an **internal social network** (i.e. Yammer, Slack, Skype, Sharepoint), use it!
- **Measure impact** – employee satisfaction, employee retention, community impact, business sales, brand visibility – against your goals.

“Lunchtime service is a brilliant idea! What’s better than helping to meet a local need and supporting a great nonprofit—all without leaving the office? I can’t wait to sign up for the next event.”

MARK YERKES,
HEALTHCARE INFORMATICS

3. Adapt to Changing Environments

Change is constant these days, especially in our work environments. Employee Service and Giving practices that worked five years ago may not be working so well now. Be flexible enough to recognize that and adapt.

- Brainstorm different approaches with your team and Employee Advisory Committee
- Get support from key company leaders by sharing your ideas
- Communicate thoughtfully and value opinions

At Harvard Pilgrim, we had to make a change when employees were given more responsibilities and had less time to devote to our service projects. A survey showed the desire was there but the time was limited. “Lunch and Serve” was our answer – local nonprofits would visit at lunch and talk about their organization. Based on what we heard, we’d build a service activity that could be done at work to aid the organization.

SOME OF OUR LUNCH AND SERVE PROJECTS:

-  **Assembling toiletry kits** and making fleece blankets for a local homeless shelter
-  **Creating notes and birthday cards** for veterans and troops overseas
-  **Holding mock job interviews** between employees and youths with disabilities



“Service opens up our lives by pulling us out of our bubble and the world we live in day to day. Escaping my desk to discover ways I can serve was worthwhile and rewarding. Lunchtime service is a brilliant idea!”

Harvard Pilgrim sales executive

Skills-Based Volunteering: Using Professional Skills for a Cause

by Danielle Holly, Chief Executive Officer, Common Impact

Skills-based volunteering is one of the fastest growing corporate engagement programs, with more than 60% of programs reporting some form of skilled volunteering or pro bono work.

97% OF MILLENNIALS REPORT THEY PREFER TO USE THEIR SKILLS TO SUPPORT A CAUSE.

Skilled volunteering brings critical capacity-building skills to nonprofit organizations, enabling them to run their programs more effectively. At the same time, skilled volunteering can increase employee engagement and deepen talent development – making it a “win, win, win”!

Love the idea of skills-based volunteerism but not sure how to get started?

- **Define your Community and Business Goals:** What outcomes are you looking to inform in the community? What groups of employees are you looking to engage? What are the professional skills you’re looking to develop in your employees? What do you want to be known for in the community?

Harvard Pilgrim wanted more opportunities for younger professionals to take on independent, creative opportunities that would build their leadership skills, so the Harvard Pilgrim Foundation added single day skills-based volunteer projects to its annual Boston Service Day.

According to Gallup, **90%** of companies showed a **drop in turnover after implementing a skills-based volunteer program.**¹

¹ Gallup Annual Employee Engagement Report, 2016

- **Build Buy-In:** Form a cross-department committee of advisors that includes your corporate social responsibility (CSR) team, social impact, Human Resources (HR) and business unit leaders to ensure you have the needed perspectives to get the program off the ground.

Harvard Pilgrim’s committee has staff with these key functions, who are also at all professional levels – from managers to senior leaders – as well as from diverse backgrounds.

- **Define your Pilot Culture:** Some companies are “go big or go home” and some like to pilot small. Figure out what will excite your employees and motivate your leadership to pay attention!



**Scaling Up:
Charles Schwab
Pro Bono Challenge**

Charles Schwab took the flash consulting model and brought it to nine regions through the Pro Bono Challenge. Read through this three-year study to see how Charles Schwab leveraged this quick hit model to carry out over 300 projects in one month.

<https://commonimpact.org/pdf/CISchwab3-YearStudy-PBC.pdf>



**Building Leadership Among
Female Technologists:
Fidelity’s PIT Group**

Over the course of four months, seven senior-level female employees in Fidelity Investment’s Personal Investment Technology (PIT) Group leveraged skills-based volunteering to cultivate the leadership skills needed to succeed. View this case study to see how their tech expertise resulted in a social return on investment of \$59,000 for a local nonprofit – that’s a win-win for everyone.

https://commonimpact.org/pdf/Fidelity_PIT_FIRST_NC_Case_Study.pdf



**Building from Success:
The Harvard Pilgrim
Foundation**

Over the past 11 years, the Foundation’s corporate service days have been one of its most popular events, driving engagement from colleagues, business partners and the community across our four NE regional markets in service projects. In 2019, in partnership with Common Impact, we added a skills-based volunteer element to the Boston Service Day. Ten employees leveraged their HR and Marketing skills to address critical capacity building needs at The Food Project, a local youth development and food advocacy organization – while also enhancing their own skillsets.

<https://www.youtube.com/watch?v=9MwzYRuCJNU&feature=youtu.be>

HELPFUL RESOURCES

Here are a few resources from our partners at Common Impact that can help you get started:

Capacity Commons: A one-stop-shop to implementing a skilled volunteer program
<https://www.capacitycommons.org/>

Talent Development Toolkit: Design skilled volunteer projects that build specific workplace, functional and leadership competencies
https://commonimpact.org/pdf/Talent_Development_Toolkit.pdf

Measurement Framework: Identify what success looks like for you across your employee engagement, talent development and community goals!
https://commonimpact.org/pdf/Measurement_Framework.pdf

Project Portfolios: A sampling of projects that your employees can support
https://commonimpact.org/pdf/Team_Consulting_Disaster_Project_Portfolio.pdf



CELEBRATE COLLEAGUES

Any organization committed to recruiting and retaining top talent must learn the art of recognition and appreciation. Top companies realize this, so it's no surprise that employee recognition programs are quickly becoming one of the fastest-growing areas of talent management.

(Gallup Report, 2016)

Recognizing employees for their Service and Giving contributions is a great way to build employee morale. A few years ago, Harvard Pilgrim started the Community Service Awards to celebrate the extraordinary charitable work of our employees.

Stefany Mendez is one of those we celebrated. To support her Latino community in Worcester, Stefany, who works in Procurement, channeled her energy into the community as a role model, mentor, educator and leader. She has helped children learn about faith, she has mentored high school students seeking higher education, she has served her community to aid in health disparities at annual Latino health expos, and she creates opportunities for her Latino colleagues to be influencers and decision makers.

Stefany's story is just one of the many examples of Harvard Pilgrim staff and nonprofit partners who are committed to reinvigorating local communities and actively working toward making them better places. And the awards ceremonies have helped to inspire yet more participation.

"It was uplifting to hear the wonderful stories and examples of commitment to the community at the awards celebration. I continue to be inspired by our company's commitment to service and giving."

TISA HUGHES, LEGAL

Here are a few other ways to highlight great employee involvement:



Have your CEO send the employee a note



Feature the employee in an article in the company newsletter



Showcase the employee on the corporate website

TELL YOUR STORIES

Service and Giving programs focus on action, but without a robust communications strategy aimed both within your company and to the wider community, you are missing an opportunity to keep your program strong.

Here are some ways to tell your Service and Giving stories:



Go beyond words – vivid imagery will stay with your audience.

Take lots of photos during service projects and shoot video of volunteers and recipients. With easy online graphics tools like Canva, you don't need a design department to create polished results.



Use your internal messaging systems – email, intranet, enterprise social and bulletin boards – to reach everyone in your organization.



Make sure the outside community knows what you've been doing.

Send out press releases and follow up with local media. Use a variety of social media platforms to create your own posts and share posts from other participants. Don't forget to encourage your partners to share your posts and encourage employees to post too.



Create a CSR or community involvement report and share it.



Chart outreach and engagement to include in year-end performance results. Your digital tools can provide metrics, so be sure to use them. And keep track of any media coverage your programs receive.

Sample communication tools and internal blog posts are included in the "Supporting Documents" (page 17).

Welcome

Employee Service & Giving Makes Sense

Getting Started

Expanding Your Program

Skills-based Volunteering

Helpful Resources

Celebrate Colleagues

Tell Your Stories

Looking Ahead

About Harvard Pilgrim and the Foundation

Supporting Documents



LOOKING AHEAD

We've given you many ideas and examples here, but creating a Service and Giving program that fits your organization's culture, priorities and needs will depend on both initial research and ongoing evolution. We hope this guide encourages you and your company to join us in this important work. And most importantly, please keep us posted on your progress and successes!

ABOUT HARVARD PILGRIM AND THE HARVARD PILGRIM HEALTH CARE FOUNDATION

Harvard Pilgrim is one of the nation's leading not-for-profit health services companies that, alongside its subsidiaries, is helping to improve the well-being of more than three million people. For more than 50 years, Harvard Pilgrim has built a reputation for improving quality and value in the healthcare system. With a national presence and local approach, Harvard Pilgrim provides more than just exceptional health care. As a mid-size company, Harvard Pilgrim builds its reputation and brand on serving the communities in which we live and do business. Through its charitable Foundation, Harvard Pilgrim provides community service and nonprofit engagement across business markets to impact the communities we serve. These activities add up to a powerful synergy that makes Harvard Pilgrim better as a company and as a corporate citizen.

HARVARD PILGRIM HEALTH CARE:
Michael Carson, President and CEO

Cathleen A. Schmidt, Executive Director and CEO, McLane Middleton

HARVARD PILGRIM HEALTH CARE FOUNDATION BOARD OF DIRECTORS:

Heidi M. Brooks, Chief Operating Officer, National Institute for Child Health Quality

Martin D. Cohen, President and CEO, MetroWest Community Health Care Foundation

Lisa DeSisto, CEO, Maine Today Media

Len Fishman, Director, Gerontology Institute, McCormack Graduate School, UMass Boston

Nancy L. Garrabrants

Chris Knopf, Co-Publisher and Editor, The Permanent Press

Robert Lewis, Jr., Founder and President, The BASE

Michael R. Norton, Communications Manager, Unum Group

Tracie Sponenberg, Senior Vice President, Human Resources, The Granite Group

PROJECT TEAM:

EDITOR

Karen Voci, President, Harvard Pilgrim Health Care Foundation

WRITER

Janelle Woods-McNish, former Director, Service and Giving, Harvard Pilgrim Health Care Foundation

Elizabeth McNamara

DESIGNER

Janelle Douglas, Senior Graphic Designer, Harvard Pilgrim

SUPPORTING DOCUMENTS

- I. Paid Time Off Policy**
- II-III. Giving Policy and Protocol**
- IV. Event Work Plan Template**
- V. Run of Show Template**
- VI. Communication Tool: One Page Informational**
- VII. Internal Blog Sample**
- VIII-X. Service Impact Report Template**

Volunteer Time Policy

At the heart of Harvard Pilgrim Health Care Foundation's commitment to healthy, strong communities are the skills, energy and commitment of Harvard Pilgrim employees. Across Maine, Massachusetts, New Hampshire and Connecticut employees invest their unique talents to transform neighborhoods and strengthen community-based organizations. To support this commitment, Harvard Pilgrim encourages and enables a range of service opportunities for its employees and provides the following Volunteer Time benefits:

Category	Eligibility	Benefit* (per calendar year)	Activity	How To Engage
Individual	All regular employees who are .5 FTE and above, are eligible for up to 8 hours (pro-rated by FTE) of volunteer time per calendar year. These volunteer hours may be used in increments, but cannot be carried over to the next calendar year or cashed out upon termination of employment.	8 hours (pro-rated by FTE)	Performed during regularly scheduled work hours to support non-profit organizations of the employee's choice (see below).	Employees should record <u>Individual Volunteer Time</u> on his/her timecard via Mentor.
PLEASE NOTE: Employees that utilize their full individual benefit may also participate in Department and Corporate service days – at the discretion of their manager.				
Department	All regular employees	8 hours (pro-rated by FTE)	At the initiation or approval of a department leader, a service day is performed during regularly scheduled work hours. These service days support non-profit organizations and strengthen team dynamics.	Department Manager should contact Janelle Woods-McNish at x37240. Employees should record <u>Department Volunteer Time</u> on his/her timecard via Mentor.
Corporate (during work hours)	All regular employees	8 hours (pro-rated by FTE)	At the approval of the manager, an employee may serve at Harvard Pilgrim-sponsored service events during regularly scheduled work hours.	Review the LiveWire on-line calendar and contact Janelle Woods-McNish at x37240. Employees should record <u>Corporate Volunteer Time</u> on his/her timecard via Mentor.
Corporate (evening or weekend)	All regular employees	Unlimited support to company-sponsored events where volunteers are recruited for service during non-working hours (evenings and weekends)	Employees are welcome to participate in a variety of company-sponsored events during non-working hours. Employees may not use or accrue their volunteer time benefit for such evening or weekend activities.	Review the on-line calendar and contact Janelle Woods-McNish at x37240. Evenings/Weekends – no tracking on employee timecard.

Please note: *Maximum allowable benefit – Harvard Pilgrim is proud to serve our communities and foster the volunteer ethic of our employees and partners. Annually, employees may participate in up to 24 hours of paid benefit for service (one (1) service day in each category: Individual, Department and Corporate). Department and Corporate hours are at the discretion of the employee's manager.

Definition of a non-profit organization -- organizations that are tax exempt under section 501 (c) (3) of the Internal Revenue Code and whose purpose is "charitable, educational, religious, scientific, literary, fostering national or international sports competition, preventing cruelty to children or animals, and testing for public safety." Harvard Pilgrim volunteer time cannot be used for: fraternal, political or lobbying organizations, sectarian or religious programs, academic research, conferences or exhibits or agencies that do not support Harvard Pilgrim's code of conduct.



Solicitation and Donation Policy:

Harvard Pilgrim Health Care is committed to providing its members, providers and employer accounts with the best service possible, as well as providing our employees with a work environment that enables them to efficiently carry-out their responsibilities. While HPHC respects the genuine and varied interests of its staff and respects their individual commitments to social issues, we also acknowledge our primary accountability to focus our attention on the needs of our customers. Because non-work related interruptions can distract staff from their primary responsibilities and be disruptive to good customer service and fellow employees, the solicitation, distribution, or the sale of goods and services by staff or others on the premises of any Harvard Pilgrim facility needs to conform to a policy that attempts to balance our business requirements and our genuine interests in caring for others.

In order to minimize unwanted interruptions, employees may not solicit on behalf of any cause or organization in work areas during working time. This rule extends to personal fundraising or the sale of any third party goods or services (e.g., Tupperware, Girl Scout cookies, school fundraising, walk-a-thons, etc.). Working time excludes lunch, break periods or the time before or after scheduled working hours. Staff also may not distribute literature during their working time or the working time of the employees to whom they are attempting to distribute the literature, and may not distribute literature in working areas at any time. Using HPHC's email system for solicitation or distribution is also prohibited.

Individuals who are neither employed by Harvard Pilgrim nor authorized to act on our behalf are prohibited from soliciting or distributing literature or other materials for any purpose at any time within our buildings or on our property.

We've established specially designated bulletin boards (see Swap and Shop Bulletin Board guidelines) our staff may use to advertise their personal property for sale or purchase. The bulletin boards designated for this purpose are not to be used for the posting of services or selling of third party goods and services (e.g., Avon, Girl Scout cookies, Tupperware, etc.).

Giving at Harvard Pilgrim is one of the ways we, as a company, meet our corporate goal "to be, and to be viewed as, a good corporate citizen." You can participate in giving in many different ways:

Individual:

- **Employee Fund Raising Campaign:** There are multiple opportunities for employees to participate in the annual corporate sponsored giving campaign. Participation is NOT required, though giving at any level is appreciated.
- **Other Charitable Drives:** Throughout the year, the company or departments sponsor periodic drives (backpacks, clothing, holiday giving campaigns, etc...). Participation is NOT required but is certainly welcome.
- **Fundraising for a Personal Cause:** Harvard Pilgrim has a solicitation policy that limits individual fundraising for personal causes at work. Please refer to the [Solicitation Policy](#) for guidelines on what is allowed regarding personal fundraising.
- **Mini-Grant Bundling:** Mini-Grant participation and bundling should be voluntary, and coercion is prohibited when seeking other Mini-Grant applicants to support a cause or organization. However, neutral methods for soliciting Mini-Grant participation and applications for a particular cause such as departmental newsletters may be used.

Department and Site: Departments are able to coordinate charitable drives with approval from the Foundation. Below is the process for getting a department drive approved:

1. Obtain support of your group/department management
2. Select a charitable organization that meets the Foundation's criteria (must be an
4. Confirm timing with the Foundation so that it does not conflict with other giving campaigns taking place within the company.

Company-Wide: If you or your department has an idea for a company-wide giving campaign, please submit your idea via our application (see below) process to foundation@harvardpilgrim.org. Foundation staff will vet the proposal to the Community Connections Advisory Committee (embed hyperlink to the CCAC member listing), identify appropriate resources if applicable and respond back to you within three weeks.

Evaluative criteria for new giving campaigns include:

- current giving activities
- ability/capacity of facilities management and/or other departments to help
- geographic reach
- existing partnerships
- and more.

If you have any questions about these guidelines, please contact [Mike Devlin](#) (3-9414) or [Janelle Woods-McNish](#) (3-7240).

DRAFT

HPHC Company-Wide Giving Campaign Request Form

Please submit this form to the Harvard Pilgrim Health Care Foundation at Foundation@HarvardPilgrim.org. Please allow three weeks from the date of submission for a decision on HPHC's participation to be made.

Your Name/Extension:	
Beneficiary Organization	
Contact Information for Beneficiary Organization	Contact Name: _____ Phone Number: _____ Email Address: _____ Address: _____ _____
Beneficiary Organization's Mission	
Campaign Goal (i.e. amount of money raised, materials collected, actions taken)	
Description of how this campaign aligns with HPHC's Core Values	
Suggested Campaign Time-Frame	
Description of logistical support needed for campaign	
Will media be involved? If so, what media and how will they be involved?	
Please provide any additional information that may be used in evaluating the above criteria:	

Welcome

Employee Service & Giving Makes Sense

Getting Started

Expanding Your Program

Skills-based Volunteering

Helpful Resources

Celebrate Colleagues

Tell Your Stories

Looking Ahead

About Harvard Pilgrim and the Foundation

Supporting Documents

Regional Site Service Day Work Plan

Site Name-- Date

Task	Point	Date Due	Specific	Status	Notes
Hold Staff Listening Session/Market Leader Meeting		4 months out			think about service site/partnerships that tie back to corporate strategy
Research Service Partners		4 months out			this will be based off of listening session information
Research and Secure College/Business Presentations		3 months out			to align with the HR talent pipeline, increase visibility, and recruit volunteers
Research Service Participants		3 months out			maine health, potential members, etc
Conduct site visit		3 months out			try to book meeting with Red Claws on same day
Confirm Service Partner and Event Date		3 months out			
Send Project Priorities List to Service Partner (SP)		2 months out			
Set up Check-In Call Time		2 months out			
Send Calendar Invites for Check-In Calls with SP		2 months out			
Confirm Signature Project Type		2 months out			Garden/aging focused?
Send Call Agenda		2 months out			
Check-In Call					2 months out
Draft Communication Plan		2 months out			LW blogs, targeted emails, chair drops, etc.
Send Call Notes		2 months out			
Review Workplan on call		2 months out			I do this depending on the service partner
Finalize Travel Arrangements		2 months out			Secure rental van, book hotel
Confirm Veggie Mobile		2 months out			
Receive Project Priorities List from Service Partner (SP)		2 months out			
Invite special guests		2 months out			utilize SP, Red Claws, and Gov. Affairs for connections
Submit Requisition for Out of Town Expenses		2 months out			
Confirm projects with facilities		2 months out			depending on the site, certain projects will need to be approved by the city for liability purposes
Secure Photographer / Videographer		1.5 month out			
Discuss Transportation Plan/Confirm Parking		1.5 month out			will employees need a bus? Does site have parking?
Create Event Overview		1.5 month out			
Confirm AV equipment		1.5 month out			check to make sure sound system works and pieces all there
Send Call Agenda		1.5 month out			
Check-In Call					One month out
Send Call Notes		1 month out			
Decide whether to have Co-PCs		1 month out			secure individuals
Discuss Weather Plan for Event Day		1 month out			
Draft Q2Q		1 month out			
Finalize Project List and Run of Show with service partner		1 month out			this includes rain plan projects
Create Cut List for Event		1 month out			if applicable
Confirm Breakfast and Lunch		1 month out			
Check in with facilities about tools		1 month out			
Develop Tools list		1 month out			
Draft Event Briefs		1 month out			
Update on registration numbers		1 month out			
Check-In Call					Three weeks out
Confirm Red Claws Clinics		3 weeks out			
Finalize Event Brief		3 weeks out			
Place Home Depot Order at Pro Desk/ Secure Delivery		3 weeks out			request an itemized invoice for requisition
Submit Requisition for HD Order		3 weeks out			

HPHC
Regional Site
Service Partner
Date

RUN OF SHOW

PREPARING THE PROJECT

- 7:30 AM Arrive at **Service Location**
- Set up projects, breakfast, and registration
- 8:30 AM Breakfast Arrives
- 9:00 AM Registration opens and volunteers begin arriving (**Location: TBD**)

OPENING PROGRAM

- 9:30 AM Opening Ceremony (Literacy Room)
- Welcome and Pledge of Allegiance from **TBD**
 - Welcome from HPHC, **TBD**
 - Energizer with **TBD**
 - Student dismissal, **TBD**
 - Volunteer dismissal and logistics overview, **HPHC Point**
 - Group Photo, **TBD**
 - Break out into projects

SERVICE

- 9:50 AM First Circle with PCs
- Deploy to Projects
 - Project and Safety Overview
 - Deploy volunteers
- 11:30 AM Lunch Arrives
- 12:00 PM Lunch (**Location: TBD**)
- 12:30 PM Volunteers redeploy to service
- 1:30 PM Cleanup Begins (**Location: TBD**)
Set-up Closing
- Sound system, backdrop, etc.
- 1:55 PM Teams head to closing

CLOSING PROGRAM

- 2:00 PM Closing Ceremony (**Location: Literacy Room**)
- Thank you from Elected Official, **TBD**
 - Thank you from HPHC, HPHC Point
- Smiley departs
- 2:05 PM Volunteers Depart

Harvard Pilgrim Health Care

Maine Service Event

Location

Date

Time

About the Service Partner

Why We Serve

All year long, Harvard Pilgrim employees roll up their sleeves and work hand-in-hand with schools and nonprofit organizations to meet the needs of local communities. This culture of giving back, reaching out, and helping local communities exemplifies who we are as a company and our commitment to building healthy communities throughout Maine.



Harvard Pilgrim Health Care Foundation

To RSVP, please contact Ashley Hackett at ext. 3-7245 or ashley_hackett@harvardpilgrim.org

Service Projects May Include:

- Transforming the gym
- Light construction
- Painting playground graphics
- Constructing privacy dividers

Event Schedule:

- | | |
|----------|-------------------------------|
| 9:30 AM | Registration |
| 10:00 AM | Opening Ceremony Begins |
| 10:30 AM | Service Begins |
| 2:00 PM | Lunch and Closing Celebration |

Service Participants

- Harvard Pilgrim Employees
- Maine Medical Center
- Red Claws
- Let's Go!



Mini-Grants Help Students Reach New Heights

Today, with any information just a click away, it's easy to forget the importance and value of opening a new book and letting your mind wander.

Last year, [Johnny Chou](#) and [Vishal Saith](#) sent their mini-grants to the Schofield Elementary School Library in Wellesley to fund the purchase of new books for students. "Books lay the foundation for younger minds to increase their knowledge, improve comprehension and give them an innovation mind-set," says Vishal.

The Schofield Elementary School Library used the funds to purchase a whole new array of space related books for students. "Our collection of space books was getting outdated, and many great new titles have been published in the past year. Now we have a fabulous new collection of books containing the latest information about planets and comets, along with several biographies of people who made important contributions to our knowledge about the cosmos," said Schofield School's Librarian. The books are already proving to be a hit too; "We put the books on display on Friday and students have already checked out about two-thirds of them!"

"Space is for everybody. It's not just for a few people in science or math, or for a select group of astronauts. That's our new frontier out there, and it's everybody's business to know about space."
- Astronaut & Teacher, Christa McAuliffe.

Thank you to Vishal and Johnny for using your 2019 Mini-Grants and for providing students at Schofield Elementary with new ways to learn and expand their imaginations! We are so proud to support worthy causes like this.

The Q1 deadline for mini-grant applications is Friday, March 20th. You can submit your application [HERE!](#) For more information, please contact [Aaron Johnson](#)

HARVARD PILGRIM HEALTH CARE FOUNDATION

Service Event Impact Report

Location

Event Regional Site Service Day

Location

Date

Service Partner

ENGAGEMENT

NUMBERS:

Volunteers # of volunteers

Students

Community Members

Total Hours Served Total hours served

Insert Service Photo Here!

Service and Business Partner Logos Here!!

Our Partner and Service:

Information about the service partner and how the service day impacts them and the community.

Inclusion and Business Investment:

Information about the impact on the business, inclusion, etc. (try to mention target areas like Medicare).

Media Mentions (List of media for the day—visibility):

The Union Leader and WMUR for a special nightly broadcast.

Working together, the volunteers (Breakdown of the work completed):

- Transformed the garden beds by turning soil, adding plastic coverings, and installing water systems throughout
- Built and 1 washing station for all harvested vegetables
- Built and 1 drying rack for all harvested and washed vegetables
- Built and painted 2 garden benches for volunteers to sit and enjoy
- Engaged 100+ students in physical activity clinics to promote not only eating by healthy living

Event Day Pictures (**Update with Service Photos**)



To see more photos visit: [add flickr site link](#)
To see the service day video visit: [add video link](#)

Survey Results

Volunteer Ratings

(Strongly Agree = 5, Neutral = 3, Strongly Disagree = 1)

Event Logistics	Average	Mode
Registration/Sign-In was quick and easy.	4.8	5
I was given information about what the service project was and why we were doing it.	4.4	5
The project was ready when I arrived.	4.7	5
There was enough food and drink provided.	5.0	5
There were enough jobs and tools for everybody.	3.0	3
This service met a community need.	4.8	5
The service project I did made a difference.	4.8	5
I had a great experience working with City Year today.	4.7	5
I want to continue to do/start doing more community service.	4.8	5
Overall Event	4.6	4.8



Volunteer Quotes

"Great Experience! Awesome day!"

"Excellent leadership and coordination. Team worked well together, I felt proud of the work."

"Great time as always!"

"I always enjoy these events. It makes such a difference."

"It was a pleasure working with City Year and finding out more about the program. City Year is very welcoming and fun to talk to and full of good information."

"I enjoyed building the picnic table."

"Look forward to working with you guys in the future."

Student Quotes (or Service Partner)

"One thing I learned today is that exercise is important to give you energy."

"One thing I learned today was 5.2.1.0. Five healthy foods, 2 hours of TV, 1 hour of exercise, and 0 sugars."

"Today I learned how to cook and eat healthy and to not drink soda."

"I learned that worms help your plants grow!"

Welcome

Employee Service &
Giving Makes Sense

Getting
Started

Expanding
Your Program

Skills-based
Volunteering

Helpful
Resources

Celebrate
Colleagues

Tell Your
Stories

Looking
Ahead

About Harvard Pilgrim
and the Foundation

Supporting
Documents

**We're here to help.
Contact us if you have
any questions.**



Harvard Pilgrim
Health Care Foundation

foundation@harvardpilgrim.org