

## Champions for Social Good Podcast

### 10 Steps to a Successful Corporate Volunteer Program: A Conversation with Roger Hancock of CSAA Insurance Group

**Jamie:** Hello and welcome to the Champions for Social Good Podcast, the podcast for people dedicated to social impact. I'm Jamie Serino, Director of Marketing with the Corporations and Foundations Division of Blackbaud. I'm here today with Roger Hancock, the Manager of Community Affairs for CSAA Insurance Group. CSAA is headquartered in the San Francisco Bay Area with insurance operations in 23 states and is a Civic 50 company nationally recognized as one of America's most community-minded companies. Roger has been with CSAA since 2003 and has more than 30 years of national leadership experience creating and managing award-winning corporate volunteer programs for corporations. Welcome, Roger.

**Roger:** Hey, thank you very much, Jamie.

**Jamie:** Yeah, we're thrilled to have you. You've got a great story to tell, and I'm really excited to get to it. So why don't you just start off by telling us a little bit about yourself, about CSAA Insurance, your role there.

**Roger:** You bet. And I'm kind of an oddball guy 'cause I've been involved in the field of corporate volunteers and program management going back to the mid-1980s when Ronald Reagan was president in fact. [chuckle] So I have a 30-plus year career managing corporate volunteer programs for large, big companies, as well as smaller companies like CSAA Insurance Group. And this has been my career, this has been my passion. And certainly, I go to work happy, stay at work happy, come home happy, having such a rewarding and meaningful and fun job.

**Jamie:** Nice, that sounds great. I'm sure a lot of our listeners can relate to that. So can you tell us a little bit about CSAA Insurance and the program there, your role in that, in setting the program up?

**Roger:** Yes. CSAA Insurance Group is a kind of a super regional, I guess, multi-regional insurance company with operations in 23 states across the United States of America. We're not in every single state, but we do sell and service insurance in 23 states, going from California all the way over to New Jersey. And we're a small company in a sense that we have 3,800 employees, and we're primarily in six significant geographic locations, such as the San Francisco Bay Area, where we have our headquarters and then we have large regional or call centers in Las Vegas, Colorado Springs, Oklahoma City, Phoenix, and a couple locations in New Jersey. And we have outstanding corporate community service programs, and our top echelon program is clearly our AAA Volunteers Program, which CSAA Insurance Group has achieved in both 2015, and last year 2016, 98% employee volunteer participation rate in our company supported volunteer program.

**Jamie:** Wow, that's great. So you're dealing with employees that are pretty spread out throughout the country, and you still managed to hit this 98% employee participation rate. And from what I understand, the participation rate was pretty close to that in 2015 as well, right? You said...

**Roger:** Correct, 98% in 2015 and 98% in 2016.

**Jamie:** That's fantastic. So I think a lot of people would want to know, how'd you do it? How'd you get

there?

[laughter]

**Roger:** Yeah, and it was quite a journey. And again as I mentioned earlier, I've been managing corporate volunteer programs for a very long time, and at CSAA Insurance Group started here in 2003, and we didn't have much of a volunteer program whatsoever. In fact, only about 8% of our employees were actively involved in the volunteer program, which wasn't much of anything at all. I felt pretty good and confident that we could grow that rate from 8%. And then we grew it over the course of several years to about 35%, which I thought was a really good number. In fact, historically in corporate America, for those companies that have volunteer programs, they were also achieving around 20, 25, 35%. Very few people were above that number. However, we had an executive here at CSAA Insurance Group who saw the benefits of corporate volunteer program, who saw what we were getting out of it from marketing aspect, from community relations aspect, from HR and recruiting and engaging our employees. And this executive felt that we should be able to ramp up our volunteer program from that historical average of 35% to 80%. And we went on a strategic journey to get to that number and then some.

**Jamie:** That's great. It's excellent that you had that buy-in, so it sounds like people were on board with this goal. Was there any challenge in getting that initial buy-in?

**Roger:** After the initial buy-in, no. In fact, when this company sets its mind on a specific goal or something that they wish to achieve... And again, we're 3,800 employees, so we can be kind of nimble, and we do have phenomenal executive management that is very approachable. And if they establish a goal, they're going to support it and back it and provide the resources and their own time to make it happen. So there weren't too many hindrances for us to go and pursue this goal to ramp up our volunteer program from again, 35% to 80%.

**Roger:** If there was any hindrances, it was probably me. I didn't think we'd be able to get to 80%, which the company had established that goal, and for the simple reason, our company celebrated its 100th anniversary in 2014. So 100 year anniversary, big centennial celebration. The company offered every single employee in the company a website, a one click website where they could go to to select a 100th anniversary commemorative jacket or a 100th anniversary commemorative golf style shirt. Well, as it turns out, only 70% of our employees clicked on the button to order a jacket or a golf shirt. And think, if only 70% of our employees are willing to... If only 70% of our employees clicked on this button, that means 30% chose not to receive a free jacket or a shirt. How am I going to engage that unengaged 30% into the overall volunteer programs? So I had my doubts.

**Jamie:** Right, right. That's really funny. Yeah, so people won't even click on something to get something for free. All right, so then tell me, what was the first thing that you did?

**Roger:** First thing that we did is we set a strategic goal. So again, the company had this idea that we thought success was 35%, and executives thought success should be 80%. But we had to figure out a way on how we were going to get to that level. So a three-year goal was established in... It was written up in 2012, we implemented it in 2013. So the idea in 2013 is that we would go from 35% to 50%. In 2014, we'd go from 50% to 65%. Then in 2015, the last year, we would go to 80%. So we set out a trajectory on how to get there, and we put it on a corporate score card. Just like a lot of companies have specific goals that they're trying to attain in terms of sales or marketing or bringing in new business or revenue growth, we put volunteerism on our corporate score card, so all the

managers and executives of this company and employees would know that this is the goal that we were going to aspire to, and not just aspire to, but achieve it.

**Jamie:** Right, that's great. So what kind of programs did you put into place to... Did you find that you needed to increase the number of volunteer programs available or the type of programs, or how you were communicating to the customer about, or the employee base about them? Can you just tell us a little bit more about that?

**Roger:** And thank you for the question, Jamie. And if it's okay, I would love to kind of really embellish, maybe take 10 minutes to answer this, 'cause I've got some different things that we did and I just want to go over them. I'm not gonna share all of them, there's actually about 15 key components that we did, I'm gonna share 10. I'm gonna hold those other five back, so if ever I meet any of your listeners some time at a conference or go fetch a beer sometime, I'm happy to share how we achieved the overall program. But for the benefit of everyone who's listening or reading this podcast, this is what we did.

**Roger:** First thing we did was new hire classes. We implemented a process here that every single new employee who got hired by CSAA Insurance Group was going to volunteer. What we found out is that we got our new employees volunteering. They immediately learned that this is going to be a caring organization, an organization that "walked the walk" when it said that they wanted our employees to volunteer. We found out that these new employees were volunteering alongside fellow new employees, as well as their managers, and it was a way to build comradery and teamwork, and engage in AAA's culture of caring and giving through volunteering right away when our employees were hired when they were going through their onboarding classes. So new hire classes. We got them right when they came in the door.

**Roger:** Second thing is what you just made reference to in your question was about, do we increase like the number of events and things like that? Absolutely. Prior to our three-year journey to ramp up volunteerism from 35% to 80%, again, finally finishing up at 98%, we did increase the number of volunteer projects. We're again a 3,800 employee company, primarily in six significant geographic locations, where we employ about 400-500, 600 employees in these large, regional call centers. In 2012 and 2013, they were doing about 175 events collectively throughout the year. So about 25 events, 30 events for each of those regions. Well, we ramped it up, now we do 500 events a year. Those specific geographic regions are doing about 80 events a year. What we have found out is that we just had to offer a lot bigger pool of projects, a lot bigger pool of diverse community organizations and our employees jumped right on it.

**Jamie:** That's great. If I could cut in with a quick question there, so I think maybe some people might wanna better understand. Now, as a smallish company, I'm imagining that you did not have this huge staff to go and execute on this plan. And so, how did you ramp up, increase the number of volunteer activities? How did you...

**Roger:** Oh, Jamie, I love it. In fact, you are talking to the staff. I am it. I fly solo here. I am a staff of one, which is not a problem at all because I actually managed Bank of America's volunteer programs for 15 years. And for a long period of time when I was at Bank of America, even with a company with 100,000 plus employees, I was a staff of one. So I feel like I've got a phenomenal situation here being a staff of one with 3,800 employees. But what we did to increase the number of those volunteer projects in all those different geographic areas like Phoenix and Las Vegas, and Colorado Springs is that we had employees who had regular jobs. They had regular jobs like anybody else at the

company, they could have been a Claims Supervisor, they could have been somebody who worked in our Salvage Department, they could have been someone in our call center but those individuals agreed to take on additional leadership responsibilities at our company to oversee the volunteerism for their specific geographic area, frankly.

**Roger:** And they love the opportunity of being asked by executives or management to take on that role, because we have a lot of giving people. We have a lot of people who want to develop their leadership skills. We have a lot of people who wanna improve their lot in life, and the lot in life of others. And we had no issues at all finding individuals in these geographic areas to take on the assignment of leading the volunteer program. And then they build their own committees, so many hands makes the work light. So we have seven, eight, nine, 10 people on a volunteer committee in each of these geographic locations.

**Jamie:** That's great, yes. So you mobilized the people and you leveraged their passion and their desire to do this, and sort of gave them the tools to succeed.

**Roger:** Correct.

**Jamie:** Great, okay. Nice.

**Roger:** And then we also built... I'd say the third thing we did, since we're gonna be having so many more community events that we really wanted to build relationships with key community partners. We already had great relationships with our community partners such as the Food Banks or Parks and Recreations Department, or Ronald McDonald House, the Heart Association, Habitat for Humanity. But we really needed to work with them, to say, "You know, we've been coming to your organization once or twice a year, three times a year. How about we come to your organization 10 times a year or 12 times a year? Can you handle that?" And consequently, we made volunteerism year round around here, where we are helping the food bank not only during their peak months of November, December, when a lot of companies have food drives and things, but we're there in March, we're there in April. We're sorting fruit in June.

**Roger:** So what we did is, we just increased the number of events. We worked with our community partners. And I'll also say this too that this company has never had a day of caring or a week of caring. Our community partners let us know a long time ago that they want volunteers year round, and not just one time a year for a day of caring event. And we honor that commitment to our community partners saying, "We'll show up 10, 12 months out of a year, whatever you need to address your community needs."

**Jamie:** That's great.

**Roger:** Another thing that we did, Jamie, was we brought some volunteer projects on site. Again, we've got some large call centers. And we wanna make volunteerism accessible to the bulk of our employees. So we started working with the American Red Cross and bringing blood drives onsite. We worked with an organization that recently changed their name from Stop Hunger Now to Rise Against Hunger, which does meal packaging programs for international hunger relief. We worked with another organization called The Crayon Initiative, which takes on unwanted restaurant and school crayons, and they sort them by colors, into blues and greens and reds. And they re-manufacture crayons, and give those crayons to kids in children's hospitals. So we brought a lot of different volunteer projects onsite, so we could have lots of different employees have the opportunity to volunteer very

conveniently at their place of work.

**Roger:** A fifth thing that we did was we really encouraged our various departments and entire divisions at CSAA Insurance Group to have large team building volunteer events. So if our Finance division was going to have a three-day all hands meeting, we're gonna ask the Finance division to carve out four or five hours for a volunteer project, or if our operations group we're getting together, the same type of thing.

**Roger:** So we built volunteer projects into regularly scheduled and planned annual meetings with these groups. And even if they had meetings off site, we would find a location or a volunteer group that needed volunteer assistance for those employees from that specific division could go volunteer. And then we've even brought it down to a smaller level. We've got lots of individual departments of anywhere from say, five employees or 20 employees. And those departments would go out two or three times a year and volunteer for organizations that they pick and choose, so those are some of the things, I don't know if you have any follow-up questions, or I should just keep rolling along here.

**Jamie:** Yeah. Well, I think you should keep rolling along. But, I guess, since you've and asked. One, I think these are great, great recommendations, and I think it's extremely helpful that you're running through them like this. I have heard of companies doing some of these and I think some of these are kinda new to me. But I guess, one question I would ask is, what do you think makes for a great partnership between your company, and let's say, a non-profit organization or a community organization?

**Roger:** For us, it's the trust that is built between the organization, between us and the organization. And what I love about our volunteer program is the fact that our employees are desired by the non-profits. They're valued by the non-profit. It's phenomenal. When we have a volunteer event and we tell our non-profits that we're gonna have 18 employees show up at the food bank on Thursday morning to volunteer, well 17 or 18 employees are actually going to show up. We have heard from some of our non-profit organizations that they say from other companies who are coming to volunteer that they might promise 15 volunteers to show up on a Friday to sort food, but maybe only six show up. So we have built into this program the commitment that our volunteers are reliable, conscientious and committed. And when we have a volunteer event, boy, they show up, and our non-profits love that. So they trust us. Likewise, we trust the non-profits to provide a meaningful and fun and rewarding volunteer experience for our volunteers. So it's a two-way street.

**Jamie:** Yeah. So, actually, I'm glad you brought that up because I am thinking through kinda devil's advocate type questions. It's great that you say you get 18 people signing up and 17 or 18 people show up. So, I'm wondering if you have any advice for someone in your position where they have 18 show up, and like you said, only six show up or five show up. And also, maybe combined with that would be this idea that maybe someone does raise their hand in a local office, or let's say, retail store or something like that, and they do say, "Yeah, I'll do this." But then they don't really do it. So you've had volunteers in your local office raise their hand, it sounds like they've been doing a phenomenal job on that local level. How did you get that? And have you ever had someone not quite step up the way they promised? And how are you getting 17 or 18 volunteers show up as promised?

**Roger:** Yeah. Our participation rates for employees who are signing up for event and showing up... I don't have exact statistics, but again, anecdotally, it's like 90% to 95% of employees who sign up were showing up. And what that does is truly shows the company's commitment to allow our employees the paid time-off work to volunteer, to go to these events. The needs of the business come

first. The staffing needs of the business come first. And then after that, volunteerism. So again, we're running a business here. We've gotta address the company and staffing needs first. But how we're able to get these phenomenal, what, show-up rates, [chuckle] participation rates and also showing up rates is that we publicize events two-three months in advance, lead time with our non-profit partners. We will know six to seven weeks out how many people have signed up for a particular event. We're very thorough with our confirmations reminding employees about their commitment to attend.

**Roger:** And then consequently, we also work with management so that they know that 18 of their employees are going to be gone on a certain day because they're gonna be sorting food at the food bank for three or four hours. So the processes are in place to ensure that executive management knows that they're allowing employees paid time-off. Their immediate manager or supervisor knows that their employee is gonna be gone or a group of employees will be gone for several hours. And then the employees themselves honor that commitment. Very rarely, when the one or two people don't show up is because of staffing needs. Those have already been addressed in advance. What typically happens is, it's everyday life. Somebody has a cold or they've got a sick child or hey, we're CSAA Insurance Group, maybe somebody had car trouble that day. People are showing up not because of work-related reasons, but just because life has happened on that particular day.

**Jamie:** Yeah. So it sounds like the primary things you're doing is this planning far in advance and communicating with your employees and with the non-profits, with the community in advance. And that planning, planning, planning, it sounds like that's what paying off.

**Roger:** Correct. And I'll also add that we don't do what I call 'fire sales' for volunteer events. Sometimes a non-profit organization, not typically our partners that we work with on a regular ongoing basis, but some type of non-profit might say, "Oh, okay, here it is. Today we're on... ", whatever the day is. "February 9th, we need volunteers for February 13th. Can you help us out?" And we don't jump at those fire sales unless there is some really critical need, like a disaster occurred. Like fires in Northern California or flooding in Phoenix, or whatever the case may be, then, of course, we're gonna jump. But we really want to work with non-profits and plan our events and our calendar far in advance, so we can make sure that we can get our employees off the phones or out of their work area, so that they can address their community commitment of volunteering on the day that they had signed up for.

**Jamie:** Gotcha. Okay. So on to the next thing you did.

**Roger:** Okay, yeah. Next thing was actually to... I'll call this one number six, to go travel and promote the volunteer program. Again, I'm a staff of one, but we're working primarily with employees in six significant geographic locations, and I go to those locations multiple times throughout the year to meet with key management leaders in that facility, to meet with those volunteer committee leaders. And then I also meet with, obviously, individual employees who have their pet projects or the volunteer events that they wanna do and find out how we can rally other employees to support their volunteer interests. Last year, I was on the road 130 days, which also includes vacation time in there. But 130 days, traveling to our different CSAA Insurance Group locations, or traveling to events. In fact, a Major League Baseball player plays 81 road games and then also has a month of spring training in Florida or Arizona.

**Roger:** I travelled last year more than a Major League Baseball player to ensure the success of this program, by talking to the right people and promoting the program, so we could hit these volunteer numbers of 98%. Speaking of baseball. Number seven, we hit a home run in 2013, the first year that

we embarked on this journey to take volunteers were from 35% to 50%. We had that goal in 2013. We hit a home run with our Oklahoma City office of 500 employees, and they hit 100% volunteer participation, proving that it could be done.

**Jamie:** Wow, yeah.

**Roger:** And in Oklahoma City, we have production on the clock, call center employees. So if they could hit a 100% volunteer participation, why not all of our other locations? So they set the standard, and of course, Oklahoma City hit a 100% in 2014, 2015, 2016. But we leveraged what we learned from Oklahoma City, we used them as the model for how all of our other sites could hit that 100 or get close to that 100%. Again, I'm not gonna share all the secrets in this area. But we had a huge success, a home run with one of our facilities, Oklahoma City, that proved that they could hit 100%, and then we took some things that we learned there and applied it to Colorado Springs, Phoenix, New Jersey, and certainly where our headquarters office here is, in the San Francisco Bay Area.

**Jamie:** So it was something that wasn't like an anomaly there, you were able to replicate it in other locations because of the tactics that they used there or what have you?

**Roger:** That is correct. That is correct. Again, regrettably, I can't go into all the details, maybe on a side conversation with some of your listeners or people reading the script here, but I'd be happy to share some of the things that we did to make this work, to get that 100%. Other things that we did, in fact, is AngelPoints. CSAA Insurance Group has been a long-time customer of AngelPoints. In fact, we signed on with AngelPoints in January of 2004 and went live six weeks later in March of 2004, and we've been using the product now for, gee whiz, 13 years. I know a lot of other companies have used different vendors... You gotta have somebody, you've gotta have something in place, you can't do this on Excel spreadsheets, or emails back and forth. You gotta have some type of system. But I know a lot of other companies in corporate America that have volunteer programs have maybe changed their vendors who provide volunteer services three times or four times.

**Roger:** We have been committed with AngelPoints. And I've always said that if you have a volunteer program that has a team emphasis in multi-geographic locations, AngelPoints is the one. And again, I'm not gonna go in a lot of the details, but AngelPoints have an offer, hopefully your listeners and viewers know it, but the framework is there, all the pieces to have a successful, corporate volunteer program to create, to communicate, to manage and evaluate the volunteer program is done through AngelPoints at our company. There's also a company that hit 100% volunteer participation last year, in 2016. It's a little bit smaller company than CSAA Insurance Group, but Berkshire Bank is an AngelPoints user, they hit 100%. So you need to have some type of volunteer tracking tool, some type of volunteer management system. For CSAA Insurance Group, that has been AngelPoints.

**Jamie:** Yeah, you certainly won't get an argument from me, and I'd also certainly say thank you for the dedication there and being a customer for so long but I think the message there for our listeners is the idea of the technology platform. And rewinding back to some of the other things you said, I think that's one of the things that helps you to plan, helps you to communicate and promote these events that you put on a calendar.

**Roger:** And all throughout some of the things that we've done, real quickly, like I said, I'd take 10 minutes on this particular question. I've gone a little bit long, and my apologies for that, Jamie.

**Jamie:** That's all right. That's all right.

**Roger:** But we also partnered, I'll call this number nine, we partnered with our wellness programs at CSAA Insurance Group. We have aligned the volunteer program with our very important wellness programs. We're trying to manage health care costs and get our employees healthy by having them move their feet, and certainly by moving their feet, by participating in walkathons or cleaning up trails or doing something. And what we do in regards to volunteerism and wellness is that employees who volunteer twice a year at CSAA Insurance Group receive \$100 to go into their health savings account. There have been studies, in fact, a study that was done by United Healthcare a couple years ago that showed the benefits of volunteerism to having found wellness practices, to having a better outlook on life, to reducing stress.

**Roger:** So we have taken what we learned from that United Healthcare study about volunteering and wellness, and we're backing it up by encouraging our employees to go out volunteer a couple times a year, and they're gonna get \$100 to go into their health savings account. So that is a phenomenal little deal here. And then, the last thing I wanna touch on is that we have a marquee event at CSAA Insurance Group. Lots of companies are doing the Make a Wish Foundation, or they're doing Junior Achievement or building homes for Habitat for Humanity. They might be sorting meals for Stop Hunger Now. They're doing blood drives.

**Roger:** We're all doing the same things. But at CSAA Insurance Group, we found a niche that no other company is doing. And what that is, is that we volunteer at our National Parks. We will spend three days, a Friday, Saturday, and Sunday, going to Grand Canyon National Park or Yosemite National Park, or Zion National Park. And we'll volunteer for a Saturday, being led by the park rangers who invite us in. They provide free camping, free admission for our volunteers, in return for six, seven, eight hours of volunteerism on a Saturday. And these events are huge at this company. Whether or not our employees participate in them or not, they know about our National Parks program. And the company, CSAA Insurance Group, provides our employees with a paid day off work on Friday, so our employees can safely drive and travel to the Grand Canyon. So, for example, we have employees in Phoenix, Arizona. They will drive 225 miles to the Grand Canyon, about a four, four-and-a-half, five-hour drive. But they get a paid day off work on Friday to do so. The same with Yosemite. It's a great employee benefit.

**Jamie:** That's a great program. Yeah.

**Roger:** So that is our marquee volunteer event, and it is a big deal at CSAA Insurance Group about our partnership with the National Parks.

**Jamie:** That's great.

**Roger:** All right, so those are my 10 little things, Jamie. Sorry about the length of time on that, but I just wanted to bring those all home.

**Jamie:** No, that's great. I'm sure everyone appreciates the advice, and I had a chance to kind of ask some follow-up questions throughout, so much, much appreciated. And for the last two points, I really like how you did comment on combining things there, so you're able to combine and leverage the wellness program and use that as part reward and part to show, "Well, this is actually a benefit here." That was very smart, and I love the reward of being able to go to a National Park like that. So, some really smart, smart moves there by you guys.



**Roger:** Well, thank you. We think so, too.

**Jamie:** Yeah, nice. So, another question would be, do you guys... Now that you have such a great employee participation, you have great employee-base of passionate volunteers, have you been looking to do anything related to the sustainable development goals, or anything where maybe we can hone in on a certain focus, or you still like to keep the program broad and to sort of touch upon many different areas to help different people and perhaps the environment or something like that?

**Roger:** And of course, I'm very familiar with the sustainability goals that are out there, that have been established. For CSAA Insurance Group, again, we're a multi-regional company spread out in various locations throughout the nation in the 23 states. And what our focus is really providing opportunities that our employees are picking, choosing, and selecting. We're doing the things that our employees want to do. We're doing the things our employees choose to do. And a lot of that, what our employees want to do, is environmentally related, certainly, or sustainability related. Our National Parks are a great example of that. We are going to the National Parks and cleaning up the trails at Zion National Park. Unfortunately, when people go on the trails, they're throwing their water bottle off to the side, or they're dropping napkins, or granola bar wrappers. And we are hiking trails and picking up the debris, so the trail is clean and enjoyable for all.

**Roger:** I mentioned a project that we are working with, the Crayon Initiative. The Crayon Initiative is an organization that is taking crayons that have been donated by schools, by restaurants. Instead of those crayons being thrown in the trash can at the Applebee's or the Chili's or the BJ's Restaurant, those crayons are being collected. Instead of their going to a landfill, they're getting re-sorted by color, by our employees, and then they're being re-manufactured into new crayons going to children's hospital, which right there is a wonderful environmental and sustainability story. So we are doing a lot in this area. But as for the sustainability goals, we're aware of them, but we're really doing the things that our employees pick and choose.

**Jamie:** Gotcha. And so, I think having a great impact, so that's great. You also spoke a little bit about developing leadership. And sometimes we hear about people doing skills-based volunteering-type things. But it seems like, whether or not you do that, you're able to use your volunteer program as a little bit of a sort of leadership development initiative, because there are people that are sort of running programs for you. Can you talk a little bit about that?

**Roger:** I can, and thank you very much. And in fact, when it comes to leadership development, we have seen that employees who are actively engaged in the volunteer program, or leading the volunteer program for their specific geographic area or region, are being recognized and are receiving promotions for their work, because they're growing as a person. They're improving their lot in life, personally and professionally, so we have seen that correlation. Again, just about everybody at this company volunteers, so we've got a lot of great folks out there. 98% volunteered last year. But we have looked at some of the statistics, using the tools of AngelPoints, we are able to survey all of our employees at the conclusion of an event, and we ask them a variety of open-ended questions, so we can get some subjective feedback, as well as some set standard questions relating to volunteerism and their job. And we have found out that 97% of our employees are living our company's values when they volunteer.

**Jamie:** That's great.

**Roger:** 95% believe that AAA volunteers improves employee engagement here at this company. 98%

believe that AAA volunteers is building team work at our company. And then specifically to address the question that you asked a moment ago about skills, 97% are learning new skills that is helping them in their current jobs because of their volunteer participation. We do do skills-based volunteering, we do pro bono. In fact, about 20% of the volunteer projects that we do are either skills-based or pro bono, so it's a large component to what we are doing here at CSAA Insurance Group. By choice, by design, we are not 50% skills-based or 75% skills-based, because we really wanna do the events that our employees are picking and choosing to do. I don't want to go too far off the path here, but one of the reasons why a lot of companies are not able to achieve high volunteer participation rates is because of their single focus on maybe they can only do skills-based volunteering, or maybe they can only do science and technology and engineering and math type programs. Or maybe they're a health care company and they can only get involved with health care type issues.

**Roger:** So at CSAA Insurance Group, we've opened it. We are doing arts, and we're doing civic and community engagement, we're doing health and human services, and we're doing the environment, and we're volunteering for education. We're allowing our employees to pick and choose the events that they wish to do, because they have the buy-in and the passion, and they want to engage other employees in the things that they love. And if they wanna go out there and help animals, boy, we're gonna go out there and help the SPCA with their volunteer events, so it's wide open.

**Jamie:** Nice. So just a few more questions. So you've had this high rate of engagements here for just a couple of years. I wonder, have you begun to leverage it for hiring? Do you use it as part of your job description that you put out there to try to recruit? Your recruiters, is your HR Department using this as a way to bring people on, has it become a factor in your hiring?

**Roger:** It sure has. In fact, when we put out announcements relating to jobs opening up at CSAA Insurance Group, or when we write press releases about things that are going on in the company, the boilerplate at the very bottom talks about how CSAA Insurance Group is a Civic 50 company, one of America's top 50 community minded companies, so we are really playing on that, and we're trying to let everybody know that we're a top 50 company in America when it comes to being involved in the community and we are using that in hiring and promoting our company. There is a website out there called Glassdoor, where employees can evaluate their experience at a company, or talk about the things that they went through, through the hiring process to get into a company. And I read our CSAA Insurance Group Glassdoor reviews from our employees and perspective employees, and boy, it is very noticeable about how many people are making extremely positive comments about our volunteer program, and it's one of the reasons why they choose to work here and one of the reasons why they love working here, is about the fact that we provide 24 hours of paid time off work to volunteer. So Glassdoor, you may have had a bad experience with a company, or maybe you didn't enjoy your job, but when employees talk about the positive things at our company, they are typically talking about their proud achievements volunteering as part of CSAA Insurance Group.

**Jamie:** So a follow-up question there and then one that just kind of, I think, tries to tap into your 30 years of experience here, are you finding that this sort of attribute for your company is more important, is it becoming more important to a person looking, "Where do I want to work?" And what have you seen over your 30 years and what have you seen over the last, maybe five to 10, and this sort of grand, grand question, what do you see down the line? Are things improving in terms of companies, corporations' attitudes towards stepping up to help, people's individual attitudes towards wanting to be a part of something like that? What have you seen with all your years of experience, where is the trajectory going?

**Roger:** All right. Here is where I've earned the gray hairs because I've been doing this for, well essentially, 32 years. Started with a large bank in Southern California in 1985 managing their corporate volunteer programs, and as I mentioned at the outset of this conversation, Ronald Reagan was president back there. And it was Ronald Reagan who created a program called Ronald Reagan's Private Sector Initiative, where in typical Reagan fashion, he said, "Well, by golly, our government's not gonna be able to do everything, we need businesses to get involved in the community."

**Roger:** So, just by chance, the executive at that very large bank in Southern California, where I worked, was friends with Ronald Reagan, and our CEO at that bank took on the challenge of starting corporate volunteer programs in the mid-1980s. Some companies were already in that space. ARCO, a gas company that was based in Southern California, was doing volunteerism. The Walt Disney company was involved, Levi Strauss company. There weren't many people doing this in the early-'80s, mid-'80s. And, of course, it has grown exponentially throughout the last 30 years, and now, just about any small, medium or large-sized company has a corporate volunteer program. And not just having the corporate volunteer program, but a designated staff person or a team of staff people whose full-time job is to oversee volunteerism for the company. So, it has grown immensely.

**Roger:** One of the things that I have seen though, is just... 'Cause I have daughters who are of millennial age, and I know that when they were looking for employers, or when they were looking for jobs, they wanted to work for a company that was doing good in the community. They wanted a company that had a great brand, a great reputation, and then also a company that was making a difference in the community and in the lives of others. They wanted to go to work, well, they wanted to go to a job where they could go to work happy, [chuckle] stay at that company all day and be happy, and go home happy. So, I think, the expectation and the demands of millennials is that you've got to have a corporate volunteer program. And not just to have one, but have an effective, strategic, well-managed program that's gonna address community, company and employee needs.

**Jamie:** All right. That's great, that's great, Roger. So, to conclude, you're gonna try to get to 100%, right? [laughter]

**Roger:** Yes, we are.

**Jamie:** Okay. So for that 2%, what do you do, do you make them walk around with special shirts, so people know who they are? [chuckle]

**Roger:** In fact, [chuckle] here's the little caveat. I've talked about our large call centers in Phoenix and Oklahoma City, Colorado Springs. Our hindrance is that we have 12% of our employees are home teleworkers. They are home teleworkers, and where we are really trying to drive our volunteerism is in company-supported team volunteer events, where employees volunteer as a group, wearing the company t-shirt, or they go out on paid company time on a Thursday morning or a Wednesday afternoon to volunteer for four or five hours, for the non-profit of their choice. And engaging those home teleworkers is difficult because they are in islands, in and of themselves, and that's why we're not quite at that 100% volunteer participation. I'm not making excuses...

[laughter]

**Roger:** Because we've engaged a lot of them, but we just have not been able to engage all of the them. We're gonna get there.

**Jamie:** I'm just really glad you brought that up, yeah. I'm so glad you brought that up because I think a lot of people are in this position, and they would want to know, "How do I engage my work from home people?" So, it is a challenge. Have you had any success with any portion of that population within your company?

**Roger:** And we have. And just because they're a home teleworker doesn't mean that they're just sitting behind their [chuckle] home office in pajamas all day. No, they're out there in the community. They're taking insurance claims, or they're meeting with potential clients and customers. But these home teleworkers do come together for semi-annual meetings, where all the home teleworkers will come into our facility here in the San Francisco Bay Area for a training, or for meetings, or announcements. And that's when we try to capture those guys and girls, is to get them involved in the community volunteer project when they come in for one of their big meetings.

**Jamie:** Right.

**Roger:** The other thing we're trying to do with the home teleworkers is also let them know that if they really are very remote, that we're gonna count their volunteerism. I mean, they might be working with the Utah Department of Fish and Game volunteering, or they might be in Idaho. They can always volunteer at the food bank, and we're going to count that volunteerism. We're trying to hit them all.

**Jamie:** That's great, that's great. So, yeah, I'm glad you brought that up, I was kinda giving you a hard time and joking around a little bit...

[chuckle]

**Jamie:** But a pretty significant issue that a lot of people deal with, so I'm glad we got to that. All right, Roger, is there anything else that you would wanna add?

**Roger:** No, Jamie. Thank you very much for this opportunity to talk about CSAA Insurance Group, and our volunteer program. If I were to add something, I would say that this level of volunteer participation, not only did we increase the volunteer participation from 35% to 98%, but again, the number of projects went up, the number of volunteer hours went up, the number of Dollar for Doer awards that we provide our employees went up dramatically. It was a snowball effect and the story is, is that it can be done. So I would advise your listeners or people reading this script, is to simply take advantage of the training opportunities that are out there in the field of corporate volunteer management. Points of Light does a fantastic job with their annual national Conference on Volunteering and Service. There are local corporate volunteer councils, people in small little communities, who have companies that are engaged in the community, get together on a monthly or quarterly basis to talk about volunteerism. So, talk to your peers. Talk to people who are in the field. Take advantage of the training that is out there and learn the tricks of the trade to be successful in this space.

**Jamie:** That's great advice and all throughout, you've offered some really great advice. So, Roger, I wanna thank you so much for joining us today.

**Roger:** Thank you, Jamie.

**Jamie:** And for our listeners, you're encouraged to connect with Roger on LinkedIn. He's a pretty avid LinkedIn user, and you should connect with him to learn more and tap into that vast knowledge that



he has. And please make sure to subscribe to this podcast so you don't miss an episode, and you can keep up with the conversation between episodes by following us on Twitter @jamieserino, @MicroEdgeLLC and @blackbaud. Thank you for listening.