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Sustainable Legacy Leadership

Developmental Partnerships

By Kittie W. Watson and
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The ethics of social responsibility and sustainability are helping to shape corporate culture at several levels. Company leaders are encouraged—sometimes expected—to take on volunteer projects, donating time and talent toward the greater community good. The result is often a deeper, more trusting relationship between the company and the community, and a sense of good will and purpose within the organization. Indeed, emerging studies show that a strong practice of community involvement helps recruit and retain quality employees.

But what if there were even more to gain? What if a company’s volunteer activities not only helped key employees feel better, but actually helped them be better?

Taken a next step, what if those efforts could be leveraged to deepen leadership capacities within an organization in ways that dramatically strengthen a company today, and lay the foundation for a more promising future for both a company and its community?

In both philosophy and practice, *Sustainable Legacies*¹ takes a more intentional and visionary approach to volunteerism—especially to partnerships with nonprofit organizations. Rather than view volunteer activities as individual, fleeting, feel-good activities, they are approached as strategic relationships designed to offer maximum benefit of donated talent or expertise to the community. In return, high-potential employees within a company make more of their volunteer efforts by using them to

gain skills and experiences that make them better leaders.

Such intentional partnerships offer a triple win that is especially powerful in tough economic times:

- » Corporations tap into a cost-effective resource to supplement in-house development opportunities for emerging leaders.
- » Community nonprofit organizations are able to “skill up” through the targeted involvement of corporate volunteers’ time and talent.
- » Communities become stronger, corporations gain credibility (and, quite possibly, profits), and leaders from both private and nonprofit organizations create positive legacies of social responsibility that inspire others to do the same.

Legacy Leadership Development

Leadership legacy is the sum total of the difference leaders make in people’s lives—directly and indirectly, formally and informally. Leaders interested in creating a sustainable positive legacy can ask themselves two key questions:

- » What does my story say about me today?
- » What do I want my story to say about me tomorrow?

By focusing on these two questions, many leaders have practiced social responsibility, with volunteer assignments at the heart of that practice. Even so, over time, many companies barely tap the potential that can come from partnering with nonprofits. Even the most socially conscious

1. *Sustainable Legacies is service marked (SM) by Innolect Inc.*

organizations often view volunteerism as an individual effort, encouraged by the company, with the primary benefit being personal fulfillment and satisfaction for the employee.

Yet the tangible and intangible benefits of volunteering go far beyond the individual, and play out in a myriad of ways. That realization led to our belief in Sustainable Legacies:

Sustainable Legacies is the process of building mutually beneficial partnerships between nonprofit organizations and corporations to develop high potential talent.

Corporate HR leaders adopt a talent development strategy that matches leaders with the needs of nonprofits in their local communities. The nonprofits identify opportunities that build new capabilities in those who serve. Rather than thinking about a legacy as the last stage of a person's career, Sustainable Legacies invites leaders to view their legacy as a story that is being written each day of their working lives. Leaders' daily contributions become the words, sentences, paragraphs, and chapters of the legacy penned by their own hands.

Benefits Today and Beyond

Most Fortune 500 companies have dedicated philanthropic/social responsibility efforts and are key sponsors for community volunteer activities. Through intentional and strategic development volunteer assignments, organizations can deepen loyalty while building talent and future leadership. However, few companies connect their financial success with their societal investments. In *Creating Shared Value* (2011), Michael Porter and Mark Kramer argued that companies can take the lead in reconnecting company success with societal improvement while surfacing new community needs and expanding markets. They define shared value as "policies and operating practices that enhance the competitiveness of a company while simultaneously advancing the economic and social conditions in the communities in which it operates" (p 66).

Calvert Investments, a leader in sustainable and responsible investing, recommends investments based on social responsibility screening factors. The Calvert Social Index® is a broad-based, rigorously constructed benchmark that measures the performance of U.S.-based companies using the following criteria: Governance and Ethics, Environment, Workplace, Product Safety and Impact, Community Relations, International Operations and Human Rights, and Indigenous Peoples' Rights. As corporate responsibility and sustainability efforts gain prominence, social sustainability issues and nonprofit partnerships become more integrated into corporate strategy.

Organizations and leaders known for their social responsibility and sustainability efforts have a leg up on attracting talent. A recent poll suggests that 80 percent of young professionals are interested in jobs that positively impact the environment, and 92 percent would prefer to work for an environmentally friendly company (Workplace Insight Survey, <http://www.adeccousa.com>). Research results from the Center for Work-Life Policy (<http://www.worklifepolicy.org>) show that high-potential employees among the Gen Y or Millennial population—tomorrow's leaders—are motivated by a desire to give back to the world; they increasingly seek out employers who allow them to volunteer on company time.

Studies also show that community causes can provide a training ground for team-building. Moody's Corporation conducted a confidential survey of employees who were involved in such activities: 96% rated their activity rewarding or very rewarding; 97% wanted to do it again; 89% felt they contributed something worthwhile to the community; 67% built relationships with colleagues they did not usually work with; 51% felt better about the company; and 46% said it made them proud to work for Moody's.

According to a 2009 article in Greenbiz.com, *Engaging Employees in Sustainability*:

Community involvement is an important cornerstone for many companies, and sustainable leadership practices

enhance public image, community relations, and good will. Increasingly, sustainability is becoming a tool to recruit, retain, inspire, and motivate your workforce.

Nonprofits and service organizations have been expanding their definitions of success beyond annual financial contributions and donor hours. However, they still chase cash and volunteers in a never-ending grind that does not necessarily build a stronger or more secure platform. Intentional partnerships between corporations and nonprofits can address these trends and fill these gaps. In addition to the traditional roles of serving on boards or donating cash to deserving nonprofits, socially conscious HR leaders can collaborate with those organizations to design talent development strategies that benefit both. While not suggesting that leaders stop serving on boards or close their wallets, there is the potential for greater impact when corporations and nonprofits form strategic partnerships.

Case Study: The Power of Partnerships to Build Corporate and Community Strength

Melonie Hall accelerated her professional development at Entergy New Orleans through partnerships with nonprofits within her community. Entergy Corporation is an integrated energy company engaged primarily in electric power production and retail distribution operations in Arkansas, Louisiana, Mississippi, and Texas. In 2011, *Corporate Responsibility* magazine named Entergy one of the 100 *Best Corporate Citizens* in the nation. It was the fourth time in five years that Entergy earned the distinction.

Melonie was trained as an engineer and had held various management positions in engineering and operations; her work had to meet the requirements, expectations, and restrictions of the regulated utility industry. She was interested in a broader leadership role and went back to school to earn her MBA. Soon after, she was promoted to Director of Customer Service, a position with high corporate and public visibility. Melonie saw the potential to make valuable contributions within

Pathway to Self-confidence and Capability

Melonie Hall, Director Customer Service, Entergy New Orleans



Figure 1. Hall's Three-Year Learning Adventure

Entergy and to expand the company's involvement in the community, which was working to rebuild from the impacts of Hurricane Katrina. She realized that her new role demanded skills that went beyond her existing experience. With support from her manager, Melonie partnered with an executive coach from Innolect, and mapped a three-year learning adventure using Innolect's Legacy Opportunity Map (Figure 1).

The first step was to identify the skills Melonie needed to achieve her goals. Her position included community outreach and leadership of a large staff, so she wanted to build mastery and confidence in two key areas: networking and influencing others. She and her coach agreed those experiences might be best gained by partnering with nonprofit organizations as a volunteer. They explored opportunities within Entergy's existing nonprofit strategic partnerships and Melonie's personal volunteer involvements. Together they charted an Individual Development Plan (IDP) designed to help Melonie be more intentional about the benefits she could give and get as a volunteer.

She and her coach agreed to start with a one-time, out-of-town activity where Melonie could practice new skills without the pressure that inevitably comes from being

a new leader in an established corporate culture. Melonie flew to Charlotte, N.C., to attend a fundraising event for the McColl Center for Visual Art. Melonie's primary goal was to become more comfortable with networking, so at the event her assignment was to approach and develop initial relationships with a specified number of people. At this point, the benefit was primarily to Melonie; neither McColl Art Center nor Entergy received any tangible, sustained value.

But Melonie said it was an important exercise:

I build confidence and learn best by doing. I could test what did and didn't work in a relatively risk-free environment and then take what worked and immediately apply it in my job. It's a lot harder to test your learning in your own corporation. Especially when you have a steep learning curve, you don't want to take big risks on a high profile project where there is a significant downside if you fail. It's not that you'd take ridiculous risks when volunteering in a non-profit. You're still making the best possible decisions. You just won't suffer drastic political consequences if things don't work as well as planned.

Having gained confidence through that experiment, Melonie then identified three New Orleans-based nonprofit activities, each designed to help her strengthen specific skills.

She was already serving on the board of Boys Town Louisiana, which gave her an opportunity to work with and observe the leadership styles of fellow board members. As part of her Individual Development Plan, she considered ways to deepen her involvement and be more strategic. She worked consciously to develop mentors among the Boys Town board members—a support group outside of Entergy she could turn to as she worked on her leadership skills. She also paid close attention to the ways in which board members used influence, rather than direct authority, to advance the organization. This was of direct value to Melonie in her role at Entergy:

On a nonprofit board, volunteer leaders have no real position power. The only way to move the board members to action is through your influence skills. Servant leadership and my ability to influence were very transferable to my job and helped me accelerate my success.

At the same time, Melonie added value to Boys Town through her existing connections and organizational skills.

A second local group Melonie focused on was the Partnership for Youth Development, a nonprofit intermediary organization that supports afterschool services for school-age children. That organization's executive director was known as a strong collaborator and public speaker—skills Melonie wanted to learn. By working with her, Melonie continued to observe effective leadership in action and gained unique access to someone who was especially adept at understanding public policy and influencing policy makers—something of direct application to Melonie's work in the regulated utility industry. In exchange for this powerful learning, Melonie introduced the organization to important new contacts in the community, and helped them develop strategies to recruit new

board members through a stakeholder analysis.

The third group Melonie chose to work with was the New Orleans Police and Justice Foundation, which was created to facilitate improvements and reforms in the criminal justice system. The organization is dedicated to raising operational funds that support an array of programs for local police and their families, such as continuing education, the acquisition of better crime-fighting equipment, and the development of an advanced crime lab. The group's primary source of revenue is an annual fundraiser that seeks the support of business and political leaders throughout the city. The key is to bring people with differing views together to support a common cause—to make New Orleans a safer place to live, work, and visit. Melonie's volunteer role was to plan the annual fundraiser and solicit sponsors:

This was a very influential committee, and I was able to build relationships with key business leaders in New Orleans while learning to take greater risks, such as negotiating contracts, soliciting sponsorships, and leading highly visible community leaders, all in the name of a very good cause. Because these leaders knew me and my work ethic through our teamwork on the committee, when problems with electrical power arose, we were able to collaborate as partners to determine the best strategy, rather than approach the situation from an adversarial position.

It was now time for Melonie to bring the skills she had gained back into the corporation. She decided to build on Entergy's existing commitment to fighting poverty in New Orleans. For ten years, the company had hosted an annual poverty summit, bringing local leaders together to discuss solutions to the region's deeply entrenched poverty. With new confidence and skills in networking, influencing, risk-taking, and being strategic, she asked Entergy's top leaders to ramp up their poverty work as part of an overall strategy of community relations. Specifically, she urged Entergy to

sponsor Pathways from Poverty, a hands-on simulation that has local leaders learning about the challenges of poverty through direct experience. Participants take on the "persona" of a poor person, then have to work through a gauntlet of situations that are realities for the poor—everything from negotiating city bus schedules to getting medical services without insurance to keeping the electricity on when there's no money to pay the bill.

Melonie's request was that Entergy leaders step well outside their comfort zone and risk a more ground-level involvement in poverty issues:

They gave me the green light so we took the risk, and it generated multiple benefits: positive public relations, increased community compassion for people struggling economically, and a shift in how Entergy looks at diversity and inclusion. Now, in addition to race, gender, and the usual categories, we look at economic status as a spoke on the diversity wheel. This has opened our eyes and presented an opportunity for the company to do better by our employees as well as our customers. (To experience a taste of this simulation, visit <http://www.youtube.com/watch?v=1pghadS1vno>.)

The use of Pathways from Poverty was the culmination of the learning Melonie had done through her intentional involvement with nonprofit organizations. And it continues to reap benefits. Melonie used the simulation exercise as a way to help her own staff build new skills; that group is now actively working on continuing the activity. On a very concrete level, Entergy employees gained awareness of how many people in poverty live in a cash economy, with no credit cards or checking accounts. To pay bills, they must go to an ATM machine, pay a fee to withdraw money, then spend more money and time on public transportation to get to Entergy's customer service building. To ease those burdens a bit, Entergy installed a no-fee ATM in the customer service building. It may seem a small thing, but it builds more trusting relationships.

The success Melonie realized has also rippled out in other ways. She is now working with her department team members to develop their own Individual Development Plans, thus building a legacy of visionary and sustainable leadership.

Legacy Opportunity Map

Melonie's story is just one example of a leader developing and then following a Legacy Opportunity Map. The map showcases types of volunteerism to serve nonprofits, and demonstrates the potential value of volunteer activities. Being more aware of such action-benefit connections helps volunteers and nonprofits partner with more strategic intention for mutual benefit.

Volunteer contributions focused on giving time are represented on the left side of the grid in *Figure 2*. Volunteer contributions focused on offering talent are on the right. The map is designed to acknowledge the significant value of all volunteer contributions. But when considered more thoughtfully as a way to develop needed skills or talent, it becomes clear that some individuals benefit more from some activities than others, and that some activities are more effective at building capacity than others.

Time-Based Volunteer Activities

Service-motivated: Think of a *willing pair of hands*. Imagine the employee who donates blood at the Corporate Blood Drive. These activities take time, but are low on the capacity-building scale, especially when it comes to developing leadership strengths.

Community-motivated: This is a *targeted pair of hands*—maybe employees in an environmental consulting firm are given time off to support a highway clean-up project. This kind of activity typically requires a greater time investment with potential to build community goodwill while supporting a local cause supported and desired by the community that is aligned with the corporation's values and strategic objectives.

Organization-motivated: This suggests an *integrated pair of hands*. These volunteer assignments typically include a

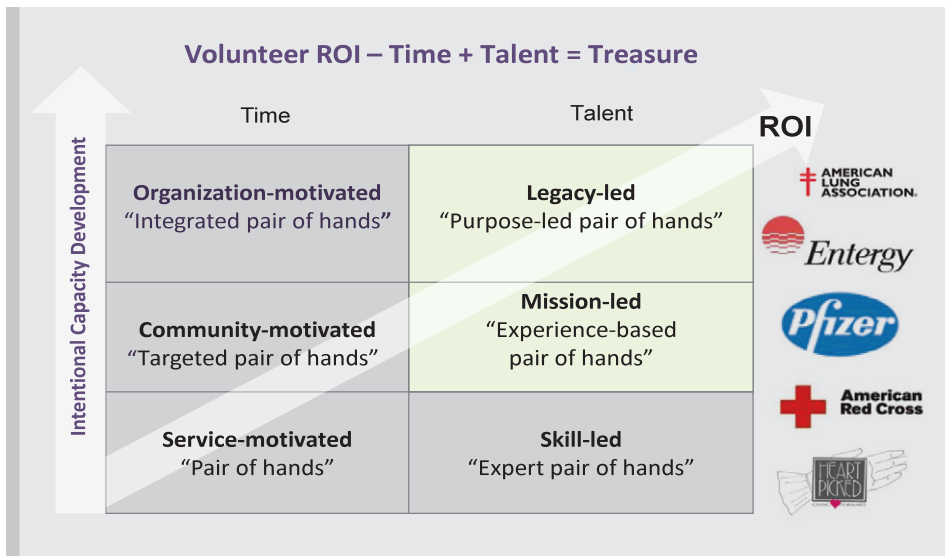


Figure 2. Innolect’s Sustainable Legacies Opportunity Map

team working together to achieve a more complex shared goal. For example, members of a company might all volunteer to work on a Habitat for Humanity site. Together the volunteer team members make a significant contribution while learning leadership, conflict management, and collaboration skills. This kind of activity offers the greatest potential for team and individual capacity development on the Time-side of the grid.

Talent-Based Volunteer Activities

Skill-led: Envision an *expert pair of hands*. For example, a financial executive might help a nonprofit with its budget projections or annual report. While a valuable contribution to the nonprofit, this activity offers the least amount of development for the volunteer because she is using existing skills.

Mission-led: This is an experience-based pair of hands that builds on a volunteer’s skill or talent, but goes beyond that set of skills while supporting the volunteer’s personal mission. Physicians supportive of third world nations might volunteer to work overseas in a developing country where medical services are sorely needed. While their medical expertise got them the assignment, the immersion in a new culture offers new experiences, deepens their knowledge base, and exposes them to fresh insights and challenges them to think differently. This type of assignment requires the individual to use existing skills as a foundation while expanding her capacity and awareness.

Legacy-led: This is a *purpose-led pair of hands* that usually emerges as the result of other volunteer contributions and experiences. For example, high potential employees might volunteer in an inner city after-school program, and then build an entire program around volunteers who create a learning center that will exist long after they are gone. The volunteers learn networking, community organizing, and planning skills, while leaving a positive legacy: a learning center for future generations of children in the community.

Success Stories: Three Companies that Make the Most of Volunteerism

PFIZER INC.—created the Global Health Fellows Program, a corporate philanthropy initiative to build the capacity of local health organizations in developing countries. Since the program’s inception, Global Health Fellows have been selected to work with nongovernmental organizations in 38 countries to deliver health care and health system support to those in need. These Fellows include Pfizer physicians, nurses, managers, and leaders from the United States, Europe, Latin America, Australia, Africa, and Asia. In recounting their experiences, Pfizer employees say they get as much out of their Fellowship time as the patients they work with. According to a 2007 report in *Entrepreneur Magazine*, the Pfizer Program is:

A strategic philanthropy program designed to fulfill corporate social responsibility, it also has had positive internal effects on employee attitudes and behavior. Almost universally, the evaluation results show that returned Fellows are satisfied with the program and the opportunities that it provides for professional growth. The program also improves Pfizer employees’ opinions of the company, with both Fellows and members of their work teams reporting increased motivation, pride in their company, and loyalty.

CISCO SYSTEMS INC.—blends career development for high-potential, senior-level employees with the company’s philanthropic and community relations goals. According to the company’s website (www.cisco.com), the Leadership Fellows Program offers sabbaticals to “top talent leaders”—defined as self-motivated, high-performing, and high-potential vice presidents and directors—to work with nonprofit organizations for up to one year. The Leadership Fellows retain their status as full-time employees during their service year, and continue to receive salaries and benefits. Leaders who have taken advantage of the program report that they return to their former positions inspired, rejuvenated, and armed with enhanced leadership skills.

ERNST & YOUNG LLP—In keeping with its value statement, this global financial services and consulting firm has a Corporate Responsibility Fellows Program geared to top performers who are eager to contribute to society while exploring a new country and culture. (Additional information is available at <http://www.ey.com/US>.) The program sends select groups of high-octane talent to low-income countries for three months at full pay. Fellows use their skills to support promising local entrepreneurs, typically providing help they could not otherwise afford, and by extension helping jump-start growth in emerging markets. According to the company’s website and Maria Pena (in Maddux et al., 2010), America’s leader of entrepreneurship-corporate responsibility at Ernst & Young:

Table 1. Sustainable Legacy Outcomes

Corporation Benefits	NPO Benefits
<ul style="list-style-type: none"> • Develops new competencies for emerging leaders & high potentials <ul style="list-style-type: none"> • Influencing skills • Networking • Employee engagement strategies • Colleague retention • Executive presence • Sales/Marketing • 3rd party advocacy • Builds strategic alliances • Provides “real-time” experience to gain confidence and expertise • Improves community regard/impact • Increases retention and engagement 	<ul style="list-style-type: none"> • Provides additional talent/resources <ul style="list-style-type: none"> Operations <ul style="list-style-type: none"> • Finance • Human Resources • Etc. • Fills talent gaps • Increases volunteer base • Allows NPO to consider other programming • Builds commitment for the cause • Expands reach and visibility to educate and garner support • Structures volunteer engagements
<p>Disadvantages</p> <ul style="list-style-type: none"> • Limited or no tax advantage • Temporarily lose internal resource 	<p>Disadvantages</p> <ul style="list-style-type: none"> • Temporary resources • Possibility of funding reductions

Fellows come back rejuvenated, transformed. They love it. People who have international experience or identify with more than one nationality are better problem solvers and display more creativity. What’s more, we found that people with this international experience are more likely to create new businesses and products and to be promoted.

What are Sustainable Legacy Outcomes?

As demonstrated above, the tangible and intangible benefits of volunteer contributions go far beyond the individual to build organizational capacity and skills. Table 1 highlights advantages and disadvantages for intentional capability development within corporations and nonprofit organizations through volunteerism. The advantages suggest that volunteerism, when structured thoughtfully, offers a promising and cost-effective talent development strategy for both corporations and nonprofits.

When corporate HR leaders partner with nonprofits to supplement in-house development opportunities with targeted community volunteer opportunities, Sustainable Legacies are possible. The nonprofit benefits and the volunteers’ skill sets increase exponentially. Based on anecdotal research there is evidence that communities are stronger, corporations are more profitable, and leaders leave positive legacies that inspire others to do the same.

As American humorist Esar Evan said, “You can’t do anything about the length of your life but you can do something about its width and depth.” It is never too late for a leader to start building a positive legacy. No matter the stories told thus far, new chapters are always possible. Positive legacies do not just happen by accident. Leaders must be intentional about what they choose to create and the legacies they will leave behind.

We would like to express our appreciation to Jacqui Banaszynski, Michael Arena, Barbara Braham, Jane Horner, Leanna Page, and Elizabeth and Theron Simpson for their feedback and ideas in support of Sustainable Legacies.

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Links

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