

## Notes from The GivingForum at EY

### Discussion 1 - Beth Knight on Sustainability Leadership Competencies

#### **Question 1: Which competencies resonate with you the most?**

- People felt most positive about the following competencies:
  - Ethically Oriented
  - Inclusive Operator
- The generational difference mentioned by Beth Knight was observed within the attendees' organisations. (The generational difference being that older managers were more likely to excel in a small number of competencies, while younger managers were more likely to be balanced.)
  - Another generational difference attendees observed that within their organisation, Ethically Orientated was a competency more frequently associated with younger leaders.
  - Younger people tended to be more willing to innovate and challenge the status quo.
- One table discussed whether early stage organisations should place less emphasis on Visionary Thinking and look to more established organisations' best practice.
- One table thought that particularly the 'ethical orientated' competency should be one of the most important competency reflected within the CSR team - especially if they are claiming that their business is acting ethically.

#### **Question 2: Do you see sustainability leaders applying them?**

- One table discussed this model should not be just for CSR individuals - if a business is acting responsibly or claiming to do so they should be apply it through teams everywhere in the business.
- The model could be used to help individuals to assess themselves as well as get peers to assess them.

#### **Question 3: How would you apply the model in your workplace? Can you see any obstacles?**

- One table suggested that these competencies should be required in leaders across the organisation, not just the CSR/CR/sustainability department.
- Make a test for team members to rate themselves and each other, then compare.
- A table thought it would be difficult to get executive buy in especially as CSR focuses on longevity and as often long term benefits and often executive buy-in looks for short term benefits

#### **Question 4: How can we build on this research? (E.g. recognition and reward of sustainability leaders)**

- Differentiate from general management
- Follow up with people to see how they have progressed (especially if they have changed jobs)
- There was consensus that recognition and reward of sustainability leaders varied in each corporation. Some corporations just wanted to make their employees aware and be humble about their CSR whilst others thought it should be something they should be talking about publicly.

## **Discussion 2 - Isabel Kelly on *Creating Leading Teams***

**Question 1: What practical steps can you take to ensure that you keep your sustainability mission at the heart of everything you do?**

- Make CSR part of induction
- Make sure the wider business actually know that the company has a CSR department, and who they are
- Align CSR strategy with the businesses aims and objectives, and company culture
- CSR strategy should have a perfect balance between realistic aims and dreamy targets, however this also needs to be aligned with the company culture - like what motivates employees. CSR strategy should have competitive elements.
- Make sure there is commercial awareness and buy in into CSR.

**Question 2: Share some examples of when you've felt challenged, from within or from outside your organisation, to dumb-down or compromise your mission and how you overcame that challenge**

- Some people within attendees' organisation don't understand CSR and think it is on the side of the business rather than central to it. However, attendees had experience of taking such sceptics on journey of discovery, educating them about the benefits of CSR. Attendees thought that one of the most effective ways to do this was to show how CSR could help them achieve their own goals.
- People confuse CSR/CR with PR.
- Attendees felt that every time they changed jobs they had to rebuild themselves.
- Attendees felt that colleagues were sceptical about the benefit of CSR as they didn't see it adding to company profit
- More women than men in CSR. This can lead to some sexism and sidelining of the department.

**Question 3: How have you created the right mix of people and expertise to enable both the money and the mission, and how do you make sure that their skill sets are equally valued, both within your team and the wider business?**

- Isabel talked about the challenges when recruiting people for her team to ensure the right mix of people and expertise. She was tasked with recruiting from within the firm without being able to look externally, and thought this would be hard. She realise you can find good sales people from within a firm who are also driven by social impact.
- Look to other departments in your firm to recruit the right skills and buy-in.

**Question 4: How could you do things differently? (E.g. do you have to dress and act in a 'corporate' way? Is standing out because you're standing up for something different an option?)**

- Isabel says that she is proud to not be corporate, and dresses in a way which reflects this. However, other attendees largely disagreed, saying that they needed to be chameleons, able to fit in with both corporate and non-profit environments.

## **Discussion 3 - Rachel Quinn on Responsible Employee Behaviour**

### **Question 1: What are the most effective methods of communication to build colleague engagement in Citizenship?**

- All forms of communications should go out simultaneously
- Network of internal volunteers alongside more formal regional boards works well
- How To guides and training programmes on ethical behaviour. It was recognised that providing training session and educating employees meant they became advocates
- Champions Network. Though challenges include keeping the network active. Also how to plug the gap when someone leaves? Train champions via video.
- One table disagreed on reporting: One attendee found that reporting increased engagement (through the natural competition it engendered between branches/departments). However, another had a company policy not to set targets because they want people to volunteer for the sake of it and found that reporting put too much pressure on. Despite this, they agreed that without reporting, employees were less likely to log their hours.
- Companies still felt that peer to peer - personal messages were the most effective form.

### **Question 2: How important is it to engage senior leaders, and how do you go about doing so?**

- Some leaders don't 'get it', especially volunteering
- Effective ways to engage senior leaders include:
  - steering groups
  - Tailored training programmes
    - When leaders get sent on a course together, specifically for them, they are more likely to take it seriously. This also provided a platform to explain to the leaders how CSR benefits other parts of the business
  - Align with HR to persuade them (e.g. talent retention; CSR relevant for millennials)

### **Question 3: Should corporates always follow a strategic approach to Citizenship or should there be flexibility for colleague-led choice?**

- Both are needed
- Should have buy-in from colleagues
- Strategy pros:
  - can enhance impact
  - Sharing this strategy with employees takes them on the journey - it is motivating
  - creating opportunities with charity partners which can provide ideas
  - Strategy - sets parameters for what employees can volunteer/get involved in and what they can't (e.g strategy provides guidelines)
- Strategy cons:
  - Legal framework can be restrictive
- Flexibility pros:
  - important to enhance engagement.
- Flexibility cons:
  - Can be more difficult to engage colleagues if the strategy includes specific charities - people tend to want to choose the charities they support