

# Let's Think Bigger!

*Wellness Programs as a Foundation for Changing our Business & World.*

## My Journey

Who Am I & Why Am I Here Today?

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**Girl Scout:** On my honor, I will try to serve God and my country, to help people at all times and to Live by the Girl Scout Law.

**Methodist:** Do all the good you can, by all the means you can, in all the ways you can, in all the places you can to all the people you can as long as you ever can.

**Marquette University:** Be the Difference.

**English Major:** I have no plan.



Social Entrepreneurship Junkie



Optimist



Introvert



Business Strategist

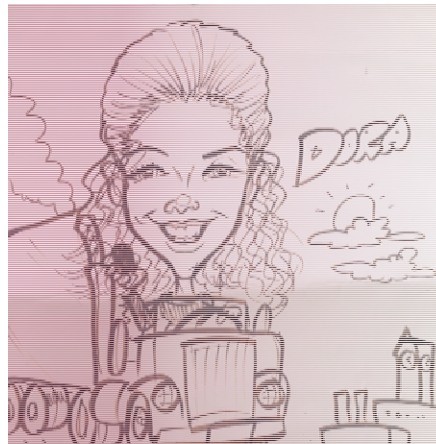


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J O B S

*"The thing most team leaders say they like best about their jobs is The Ability To Make a Difference in the Lives of Others."*

## First Career: Making a Difference

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### The Business Realities I Learned Still Apply



You Must Have Profitability



You Must Have a Plan



You Must Measure ROI



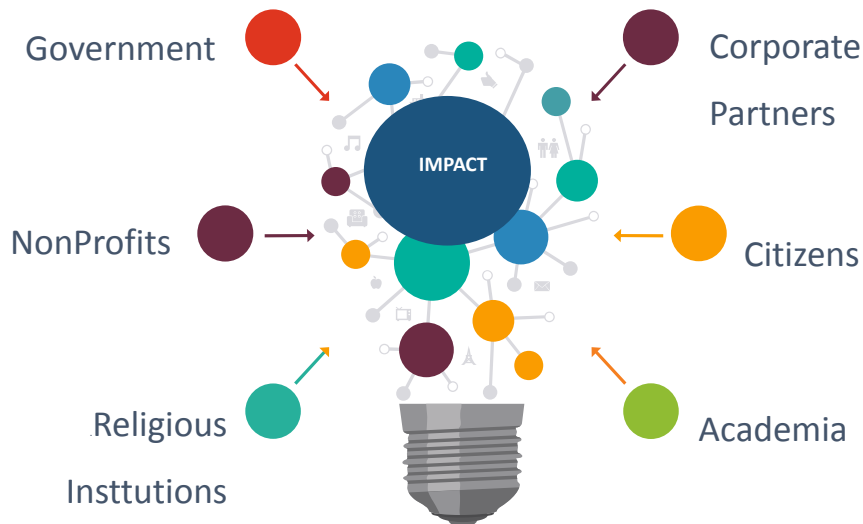
You Must Listen & Engage



You Must Have a Compelling Vision

## We Need All Parties to Align to Actually Change the World

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## What I Want to Share Today:

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- Why CSR is the coolest thing ever
- How community wellness integrates with CSR
- Ways that CSR drives business results
- A process for creating a strategic CSR plan
- Tips for creating effective partnerships

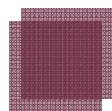
## What's the Tie Between Wellness & CSR?

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- Wellness programs ARE a component of being socially responsible to your employees
- It's not the ONLY way to be a socially responsible organization

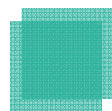
## Why You Should Consider Expanding into CSR

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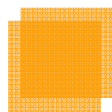
### Organizational Leadership

68% of Job Seekers want to work for a socially responsible company



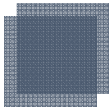
### Operations

Socially Responsible companies can decrease LTI's by up to 300%



### Finance

Investing in the community has tax implications and are a way to reinvest in the organization



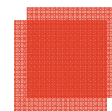
### Regulatory/ Compliance

Social Responsibility programs increase compliance and ethical decision making



### Human Resources

CSR Programs can increase retention by up to 51%



### Sales & Marketing

Increase price premiums by 20% & increase customer loyalty

## Avoidable Challenges to CSR

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- Leadership doesn't know how or why to do it
- Finance has other investment priorities
- Employees aren't really engaged
- Operations doesn't walk the talk
- Marketing doesn't leverage these programs

## The Traditional Solution

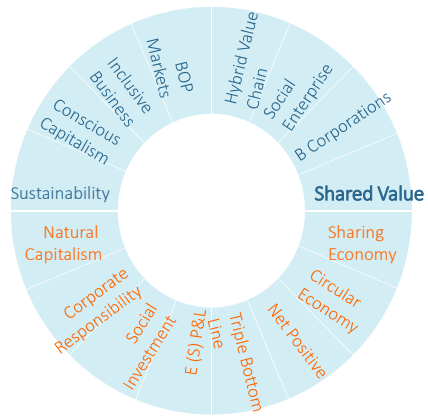
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*"We should give this to HR or Marketing"*

# "This Will Be Fun!"

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*Over 30 Different Theories & Methods*

# Before Long...

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*Excitement Turns to Paralysis*

## 5 Steps to a Great Program: Just B.E.G.I.N.

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- B: The Big Picture
- E: Explore Available Investment
- G: Gain Employee Buy-In
- I: Issue Identification
- N: Narrative

## B: The Big Picture

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### Understand your CEO/ Owner's Goals for a CSR Program

*(Tip: Your Wellness Program is a good indicator)*

**B:**  
Get the Big  
Picture.

**E:**  
**Explore**  
**Available**  
**Investment.**

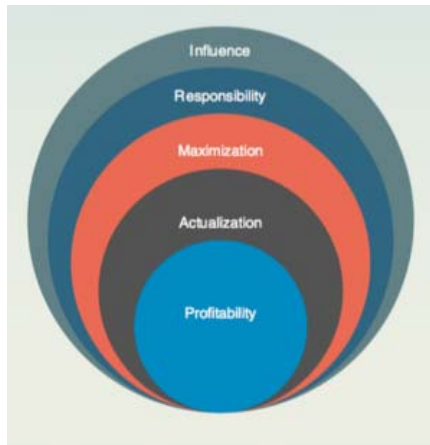
**G:**  
**Gain**  
**Employee**  
**Buy-in**

**I:**  
**Issue**  
**Investigation**

**N:**  
**Narrative**  
**Creation.**

## B: The Big Picture

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*The 5 Levels of Community Engagement*

## Level 1: Profitability

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***Characteristics:*** Concerned with Cash Flow

***Best CSR Positioning:***  
Jobs, Tax-Base, Place-Making, Innovation

***Goals for these organizations:***  
Maintaining stability & ability to grow



## Level 2: Actualization

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**Characteristics:** Looking for ways to effectively extend legacy

**Best CSR Positioning:**  
Building off of owner's purpose and goals

**Goals for these organizations:**  
Creating donor advised funds, build ways for employees to connect with existing partnerships

## Level 3: Maximization

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**Characteristics:** Utilizing business assets to extend impact

**Best CSR Positioning:**  
Aligning history & vision with employee preferences

**Goals for these organizations:**  
Employee giving programs, volunteer opportunities that also tie into leadership development and culture

## Level 4: Social Responsibility

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*Characteristics:* Looking for ways to impact the greater community ecosystem

*Best CSR Positioning:*

Utilizing corporate expertise and needs to benefit the community

*Goals for these organizations:*

Pro-bono gifts, thought leadership, convening others

## Level 4: Influence

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*Characteristics:* Interested in expanding the good work that's already being done

*Best CSR Positioning:*

Innovating new socially responsible products/ services. Accessing new markets

*Goals for these organizations:*

Innovating, expanding, communicating value

## E: Explore Available Investment

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Create a business case for investment & measurable ROI

**B:**  
Get the Big Picture.

**E:**  
**Explore Available Investment.**

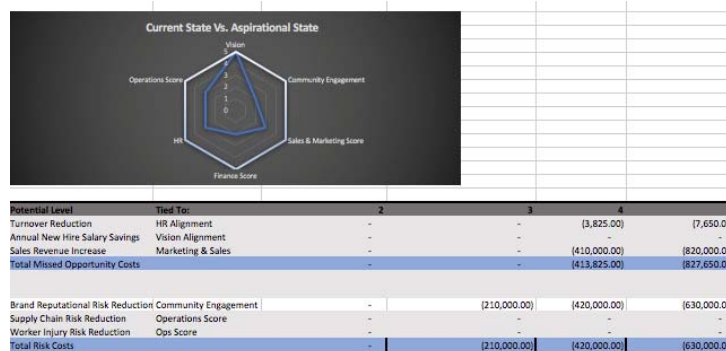
**G:**  
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**I:**  
**Issue Investigation**

**N:**  
**Narrative Creation.**

## E: Explore Available Investment

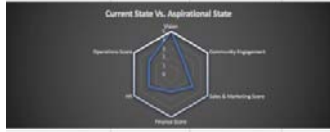
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*Bottom Line Benefit Calculator*

## E: Explore Available Investment

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*Identify your current state against each functional area*

*Understand the financial benefit to each piece of the puzzle*

*Determine if the value is great enough to invest*

## G: Gain Employee Buy-In

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Understand how your leaders and employees want to engage

**B:**  
Get the Big Picture.

**E:**  
**Explore Available Investment.**

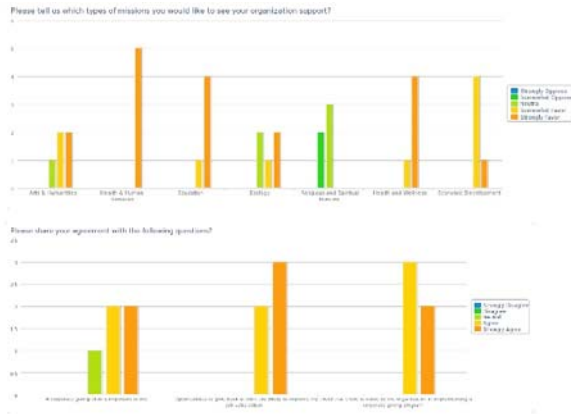
**G:**  
**Gain Employee Buy-in**

**I:**  
**Issue Investigation**

**N:**  
**Narrative Creation.**

## G: Gain Employee Buy-In

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*Bottom Line Benefit Calculator*

## G: Get Buy-In

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*Understand giving preferences (Time vs. Money)*

*Identify missions that are of interest*

*Build a process to reward activity*

## Let's Pause and Discuss the SDGs...

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## I: Issue Identification

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Identify products, processes or procedures that are out of alignment with your program that may undermine your efforts

**B:**  
Get the Big  
Picture.

**E:**  
Explore  
Available  
Investment.

**G:**  
Gain  
Employee  
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Narrative  
Creation.

## G: Gain Employee Buy-In

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### Appendix G: Operational Alignment

Product or Process	Value 1:	Value 2:	Value 3:	Value 4:	Value 5:

### Action Plan:

Misalignment Issue	Solution & Responsible Party	Target Date	Complete?

*Operational Alignment Process*

## N: Narrative

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Create a narrative that communicates the breadth of your program to all stakeholders

**B:**  
Get the Big  
Picture.

**E:**  
Explore  
Available  
Investment.

**G:**  
Gain  
Employee  
Buy-in

**I:**  
Issue  
Investigation

**N:**  
Narrative  
Creation.

## N: Narrative

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*Create a narrative that pulls from earlier steps:*

- B: The reason your organization engages in a CSR program
- E: How you have allocated the investment
- G: Why you created certain programs
- I: Steps taken to increase organizational alignment

## Risks To Doing It Wrong

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**Consumer**

Pandering

**Employee**

Inauthentic

[More Detail](#)

**Legal**

Greenwashing



## Case Study #1

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Vision & Mission: A  
Finance Decisions: C  
HR Practices: A  
Operational Alignment: C  
Marketing: A

## Case Study #2

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Vision & Mission: D  
Finance Decisions: C  
HR Practices: B  
Operational Alignment: B+  
Marketing: A

## Case Study #3

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Vision & Mission: C  
Finance Decisions: C  
HR Practices: C  
Operational Alignment: D  
Marketing: C

## Low Risk, High Reward

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*The Benefits Outweigh the Risks*

*HR is Perfectly Positioned to Manage the Process*

## Low Risk, High Reward

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- Attract & retain 68% of the workforce
- Decrease Turnover by 51%
- Decrease Lost Time Injuries by 33%
- Increase Revenue By 20%
- Protect Brand Perception
- Reduce Supply Chain Risks

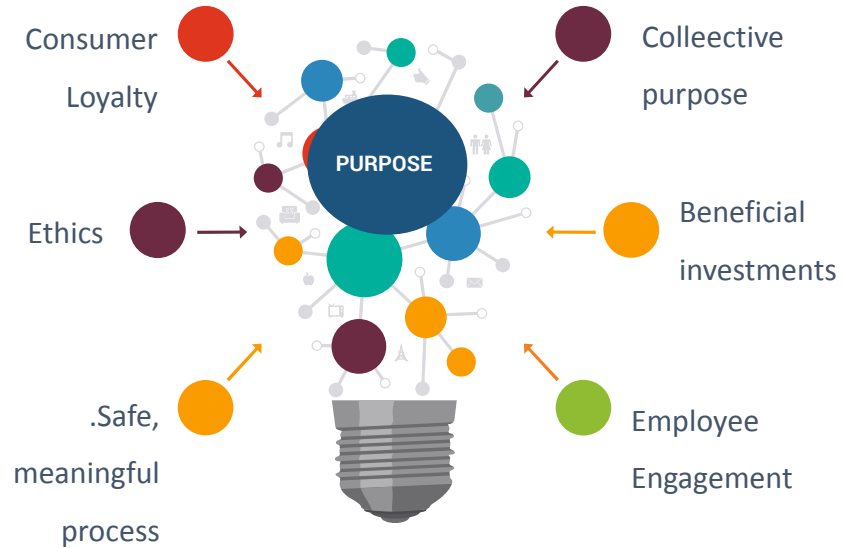
## Final Thoughts on CSR

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**At it's most basic, Social Responsibility is a promise that business wants to add more value to society than reduce it**

## The Ultimate Wellness Goal: Purposeful Engagement

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## Thank You!

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