



Engagement Targets and Metrics for Health Care Environmental Sustainability

Engagement and Health Care Sustainability

Prepared by: Sarah Pendreigh, UBC Sustainability Scholar, 2021
Prepared for: Aubree McAtee and Sarah Currie, Sustainability Consultants –
Workplace Leadership, G+L Program Leads, Energy and Environmental
Sustainability Team – Facilities Management, Vancouver Coastal Health

August 2021

Disclaimer

This report was produced as part of the UBC Sustainability Scholars Program, a partnership between the University of British Columbia and various local governments and organizations in support of providing graduate students with opportunities to do applied research on projects that advance sustainability across the region.

This project was conducted under the mentorship of Vancouver Coastal Health staff. The opinions and recommendations in this report and any errors are those of the author and do not necessarily reflect the views of Vancouver Coastal Health or the University of British Columbia.

Acknowledgements

The author acknowledges that the work for this project took place on the traditional, ancestral, and unceded territories of the xwməθkwəyəm (Musqueam), Skwxwú7mesh (Squamish), and Səlílwətaʔ/Selilwitulh (Tsleil-Waututh) Nations. As a settler on these lands, the author acknowledges her privilege and recognizes that Indigenous Peoples' rights and knowledge systems are critical to advancing sustainability and equity in the health care system. There remains significant work to be done in addressing historic and ongoing health inequities created by exploitative colonial systems. This includes recognizing that Indigenous leadership and collaboration and cooperation between Indigenous and non-Indigenous peoples are essential in achieving environmental health and wellness across the Lower Mainland Health Organizations.

The author would like to thank the Energy and Environmental Sustainability Team, in particular Sarah Currie, Aubree McAtee and Sonja Janousek, for their contribution, feedback, and support throughout this project.

Contents

Executive Summary	1
Introduction	2
Green+Leaders Program Description	2
Project Description	2
Research Approach	3
Background	3
Green+Leaders Database	3
Green+Leaders Program Tracking and Reporting	4
Literature Review	4
Employee Engagement	4
Best Practices for Employee Engagement in Sustainability	5
Best Practices for Volunteer Engagement	7
Best Practices for Volunteer Program Evaluation	8
Environmental Scan	10
Database Management Software Solutions	11
EES Needs Assessment	11
Recommendations	12
Green+Leaders Monitoring and Assessment Framework	13
Summary	13
References	14
Appendices	17

Executive Summary

In taking responsibility for the health sector's ecological impact, the Energy and Environmental Sustainability Team (EES) founded and facilitates the GreenCare Network. This network unites efforts within British Columbia's health care community to transform the health care system toward environmentally sustainable and resilient care for healthy people, place and planet. Within the GreenCare Network, EES runs a staff engagement program called Green+Leaders (G+L). G+L is a community of health care staff volunteers across the Lower Mainland Health Organizations (LMHOs) that is engaged in advancing sustainability practices within the health care system.

EES would like to improve their ability to engage staff, demonstrate their collective impact, and showcase the measurable success of the G+L program with the support of the UBC Sustainability Scholar's project.

A review of best practices for staff engagement and volunteer programs identifies the G+L program's successful areas and areas of improvement. EES incorporates a broad range of strategies, in accord with best practices, to engage staff volunteers with sustainability related topics and workplace initiatives. For example, volunteers are provided with education, training, funding and regular opportunities to give and receive peer feedback. It is important that adequate resources and clearly designated personnel are assigned to manage and support the G+L program, given it operates across Vancouver Coastal Health Authority, Fraser Health Authority, Providence Health Care, and Provincial Health Services Authority. The G+L program would be further strengthened by linking with Human Resources and by connecting with leadership at all levels to champion a culture of sustainability in the health care system.

A review of the G+L database and an analysis of current targets, metrics, tracking, and reporting finds a need for a single, unified system to manage volunteers and activities for the G+L program. Database management platforms, such as customer relationship management software and stakeholder relationship management software, offer necessary features to streamline engagement efforts with the GreenCare Network. A short list of software tools is recommended to meet the needs of EES including Neon CRM, Engagement Hub, and SMART.

The project results in the creation of the G+L Monitoring and Assessment Framework (G+L Framework). The G+L Framework is informed by research on best practices and adapted to the G+L program context. As EES undergoes a strategic refresh in 2021, the G+L Framework will be updated and applied to future program planning and evaluation.

Introduction

Green+Leaders Program Description

Green+Leaders (G+Ls) are staff volunteers and change agents who encourage environmentally sustainable behaviour, improve existing processes, and help to create an overall culture of environmental health and wellness across the LMHOs. G+Ls engage in various projects, initiatives and activities related to the following focus areas:

1. Transportation
2. Climate change
3. Energy & carbon
4. Food
5. Materials
6. Leadership & innovation
7. Water

The G+L program consists of several activities including orientation, training, Coffee Conversations, Lunch & Learns, Annual Recognition Summits, and the Sustainability Innovation funding initiative. Orientation is an online session (1 hour) that familiarizes staff with the program and the GreenCare Network. Training (3 hours) equips staff volunteers with knowledge and skills related to sustainability and change management. Coffee Conversations were launched in 2020 as informal meetings to connect G+Ls and give staff the opportunity to discuss workplace sustainability matters. Lunch & Learns include a presentation by a guest speaker followed by a question and answer period on areas of interest during the lunch hour. The Sustainability Innovation funding initiative provides selected G+Ls across the LMHOs with funding to implement sustainability projects in their workplace. Lastly, the G+L Annual Recognition Summit is an event that celebrates the integral role of G+Ls in advancing sustainability across the health care system.

Project Description

EES has identified a need to improve current key performance indicators and process indicators in the workplace leadership area, specifically for the G+L program. The purpose of the project is to create a monitoring and assessment framework to track program metrics and targets, based on employee and volunteer engagement best practices. This framework will inform program development, improve relationships, streamline processes, and support reporting efforts.

Research Approach

The project includes a review and analysis of current targets, metrics, tracking, and reporting of the G+L program. The report consists of a review of non-scholarly sources and a review of the scholarly literature on: definitions of employee engagement, quantification of employee engagement, best practices for workplace sustainability programs, best practices for volunteer engagement and program evaluation, and highly rated stakeholder management software platforms. This research informs the development of the G+L Framework.

Background

Green+Leaders Database

EES currently uses an Excel spreadsheet as the database for contact management of the G+L staff volunteers. As of May 17, 2021 the G+L database includes 659 contacts. EES is in the process of updating the database to reflect those who would like to remain a G+L in 2021; approximately 250 contacts are active. Manual entry and maintenance of the database introduces administrative work and a lack of high quality, standardized contact data. The database is organized by contact name, email, position, unit/department, health organization, site, building and department, unit type, phone, supervisor name and email, and notes. There is repetition and missing data among the categories.

An Excel spreadsheet is also used as a database for G+L event management, which is referred to as the EES Session Tracker. Events are tracked by related health organization, site, focus area, date, category, title, audience, key stakeholder, purpose/objective(s), outcome/impact/other comments, estimated number of attendees, staff member(s) involved. Prior to the COVID-19 pandemic, G+L events were promoted using Eventbrite. The list of registered attendees could be exported from Eventbrite to examine which G+Ls signed up. However, the number of events attended by each volunteer is not connected with the G+L master contact list. Therefore, there is a need for better tracking of volunteer event attendance to support the evaluation of volunteer engagement levels.

The G+L program has flourished into a strong network of engaged staff volunteers across the Lower Mainland, however the G+L database has not kept pace with program growth. Along with G+L Program Leads, EES members have an interest in exploring database management software solutions for stakeholder engagement and management in the GreenCare Network. The report includes an initial needs assessment and review of suitable customer relationship management

(CRM) software and stakeholder relationship management (SRM) software platforms for the G+L program. Overall, automating processes will help EES maintain a clean and robust G+L database.

Green+Leaders Program Tracking and Reporting

EES, in close partnership with many departments, releases the Environmental Performance Accountability Report (EPAR). EES completes four annual EPARs on behalf of each LMHO. The annual reports highlight the collaboration of health care staff to transform their workplaces in advancement of environmental health and wellness for staff, patients and community members, while also raising awareness of our climate reality. Overall, the EPARs acknowledge the leadership and hard work of everyone involved in environmental sustainability across the LMHOs.

The G+L program is represented in the EPAR under Workplace Leadership, which has the goal to “reach, engage, and inspire staff in health care to be leaders that share a commitment to and passion for sustainable and thriving healthy communities, workplaces, and environments¹.” EES reports on the following program metrics in the 2019 EPAR: the number of G+Ls trained per year, the number of education sessions and presentations, and the website bounce rate. Tracking of the program also includes the amount of G+L funding awarded, the number of G+L training sessions, the number of G+L newsletters and e-bulletins, and the total number of G+Ls.

Literature Review

Employee Engagement

In the scholarly literature, there are varying definitions of employee engagement. The lack of conceptual clarity on the meaning and measurement of employee engagement introduces ambiguities in research findings that examine engagement antecedents and outcomes. Employee engagement was first defined by Kahn (1990) as “the harnessing of organizational members’ to their work roles; in engagement, people employ and express themselves physically, cognitively, and emotionally during role performances”. More recently, Ababneh and Macky (2015) define employee engagement as “a psychological construct comprised of emotions and activation, absorption, discretionary effort, task performance, and goal identification”. For more information refer to Appendix A which provides engagement definitions selected from the literature.

¹ Vancouver Coastal Health. (2019). *Greencare 2019 environmental performance accountability report*. https://bcgreencare.ca/sites/default/files/VCH_EPAR2019Report_FINAL_Sept1.pdf

Overall, the engagement literature suggests that the scope of employee engagement is wider than individuals' attitudes towards job involvement, organizational commitment, and job satisfaction. Engaged employees show enthusiasm, adaptability to change, exuberance, and role expansion (Chacko & Conway 2019; Kwon & Kim 2020; Ababneh 2021).

Due to the wide variety of employee engagement definitions, measuring the engagement construct is highly fragmented. Literature reviews on the operationalization and measurement of employee engagement have been conducted by Ababneh and Macky (2015) and by Rana and Ardichvili (2015). Both reviews include summaries of publicly available engagement instruments, which outline theoretical underpinnings, scales, properties, and how the engagement questionnaires have been used by scholars and practitioners. For more information refer to Appendix B which provides measures of engagement selected from the literature. The authors advise practitioners and scholars to assess the appropriateness of each scale for their unique context as more evidence of validity and reliability for the scales is needed (Rana & Ardichvili, 2015).

One of the most used and cited measures to evaluate engagement levels is the Utrecht Work Engagement Scale (UWES). Using the UWES, Schaufeli et al. (2002) define engagement as “a positive, fulfilling, work-related state of mind that is characterized by vigor, dedication, and absorption”. The UWES has been criticized for its overlap with the Maslach Burnout Inventory Scale and for failing to distinguish results from measurements of job satisfaction (Ababneh et al., 2019).

Best Practices for Employee Engagement in Sustainability

Organizations have been under increased pressure to integrate environmentally sustainable management systems and practices. Companies are looking more towards corporate social responsibility, employee engagement, and sustainability to ensure success and competitive advantage (Casey & Sieber, 2016). The inclusion of environmental objectives within human resources management (HRM) practices and activities has emerged as essential to employee engagement and the integration of sustainability goals in the organization's culture and objectives (Casey & Sieber 2016; Pham et al., 2019). People and employees are integral to creating a sustainable organization and play a key role in the triple bottom line – people, planet, and profits (Velez-Castrillon et al., 2018).

Findings from Abaneh (2021)'s study show that the Ability Motivation and Opportunity (AMO) theory can explain the relationship between HRM practices and employee engagement with environmentally sustainable behaviours. In applying the AMO theory, the author argues that employee behaviour is strengthened by HRM practices that foster employee ability “(possessing

relevant skills competencies), motivation (attitudinal positivity and willingness to engage in environment-related tasks), and opportunity (the possibility for employees to take part in developing and deciding on green initiatives)” (Abaneh, 2021).

Training and development can foster the ability aspect of the AMO theory, because improving employees’ sustainability competencies and knowledge also contributes to raising awareness of their role in achieving organizational environmental goals (Abaneh, 2021). Huertas-Valdivia et al. (2018) recommend the inclusion of the organization’s ecological values and goals in hiring policies. This would also help support the ability of employees to evaluate their environmental awareness during the application and orientation processes.

Next, the motivation dimension of AMO theory can be promoted via performance management (PM), that is by customizing remuneration and appraisal tools to value employee’s efforts in advancing sustainability. Srivastava & Bansal (2016) found that creating a climate of trust and empowerment, providing ongoing feedback and recognition, managing employee development, setting performance goals, and conducting appraisals are PM activities that influence engagement. Saratun (2016) emphasizes the importance of informal PM such as supervisory feedback, in addition to formal PM, because it empowers employees to take control of their professional and personal development.

To enhance opportunity in the AMO theory, scholars suggest co-creating environmental activities and objectives with employees. In turn, engaged employees will advance ecological competencies, exchange knowledge with peers, and adopt interventions to address environmental issues (Jabbour et al. 2015; Renwick et al., 2013).

Furthermore, leadership support is key to advancing the triple bottom line. The integration of sustainability into organizational culture is facilitated by management support, because people from all levels must demonstrate commitment to the organization’s ecological vision (Velez-Castrillon et al. 2018). Supervisors who actively provide resources and feedback to participate in environmental activities can have a greater impact on employees than top management (Cantor et al., 2012). Providing work that matters is significant for employee engagement, as young talent entering the workforce is increasingly socially and environmentally conscious (Saratun, 2016; Velez-Castrillon et al., 2018). For senior leadership, the business case to invest in sustainability is enhanced client satisfaction, employee attraction and retention, and organizational performance (Casey & Sieber, 2016). Macey et al. (2008) report that engaged employees also contribute more to returns on assets, profitability, and shareholder value.

Best Practices for Volunteer Engagement

To retain volunteers and increase engagement, volunteer management practices should include regular check-ins, provide role descriptions and materials that describe volunteer expectations and tasks, and support volunteers with effective orientation and training (Harp et al., 2017). Effective communication methods such as regular volunteer meetings provide volunteers with opportunities to express their ideas and concerns (Trent et al., 2020). These practices counteract role ambiguity, job demand, and organizational constraints which have been shown to decrease volunteer engagement (Harp et al., 2017). Based on a review of 81 articles, Eniolf (2018) concludes that there are 11 volunteer management best practices supported by research to date: clearly defined roles, orientation and training, job design, liability insurance, screening and matching, recruitment strategies, supervision and communication, peer support, satisfying motivations, and recognition. The author acknowledges that the volunteer management literature is limited by its scarcity, weak methodology and narrow scope (Eniolf, 2018).

To foster a culture of volunteer engagement, there is opportunity for EES to develop new partnerships with the LMHO's Human Resources departments and to strengthen existing partnerships with executives and leadership. Findings from the Government of Canada's (2013) *General Social Survey on Giving, Volunteering and Participating*, show that participation in volunteer activities is greater when employees receive support from their employer. Noteworthy elements of employer-supported volunteer programs include certified ambassadors programs, a flex time policy (allow employees to alter their work schedule to accommodate their volunteering) or a paid time off policy (allow employees time off for hours spent engaging in a volunteer activity). Recognition such as certified Green+Leaders builds the volunteer program's reputation. Volunteer engagement is also improved when volunteers identify with their organization and are empowered; high-performance HRM practices can foster volunteer motivation and participation (Traeger & Alfes, 2019).

Employer-supported volunteering (ESV) is a part of corporate social responsibility strategy as it can be aligned with HRM objectives such as professional development and employee recruitment and retention (Volunteer Canada, 2019). According to Volunteer Canada (2019), "ESV is any activity undertaken by an employer to encourage and support the volunteering of their employees in the community." While the G+L program focuses on workplace environmental sustainability, rather than on volunteering in the community, the program shares similarities with ESV. The ten items

described in the *Canadian Code for Employer-Supported Volunteering* report are best practices that EES may refer to for planning and evaluating the G+L program².

Examining how the literature measures volunteer engagement may help to inform the assessment of G+L engagement levels. Most articles use self-reported cross-sectional surveys to measure the effectiveness of volunteer management practices (Eniolf, 2018). Both Harp et al. (2017) and Trent et al. (2020) adapted six items from the UWES to measure the extent to which volunteers engage in their volunteer work. Participants were asked to consider their volunteer engagement by rating items on a Likert-type response scale from 1 (strongly disagree) to 5 (strongly agree) (Trent et al., 2020). The UWES has demonstrated good reliability (Harp et al., 2017).

Best Practices for Volunteer Program Evaluation

There are many program evaluation challenges for volunteer managers specifically that some volunteer outcomes may be difficult or expensive to measure. For example, sustainability engagement programs are often designed to increase behaviours that are not easily quantified (C2ES, 2015). Rehnborg and Moore (2012) advise volunteer managers to track qualitative measures by scheduling exit interviews with volunteers who have completed a significant project, by periodically surveying volunteers, and by holding casual focus groups to gather volunteer input. Eniolf (2018) found that intent to continue volunteering, volunteer satisfaction, and time volunteered are the most commonly used dependent variables in the literature. In the literature review, Eniolf (2018) emphasizes the lack of support provided by scholars to volunteer managers on how to foster subjective measures such as volunteer pride in the organization.

Across the literature, determining quantitative measures tends to be less complex than analyzing and reporting qualitative data on volunteerism. Potential metrics include the number of volunteers attending events, the organization's return of investment (place a value on volunteer's time), the number of referrals made by volunteers, and the amount of service over time or ways in which volunteers have begun serving in new capacities (Rehnborg & Moore, 2012). For quantitative data, Eystad (1997) suggests indicators such as the number of clients served, number of dollars spent or saved as an outcome of volunteer services, amount of training received by paid staff and volunteers, rate of volunteer turnover, number of paid staff working with volunteers and to what extent, and number of hours volunteered.

² Volunteer Canada. (2019). *Canadian code for employer-supported volunteering*. https://volunteer.ca/vdemo/CorporateCitizenship_DOCS/ESV_Code_April_2019_v2.pdf

The International Labour Organization’s (ILO) 2011 *Manual on the Measurement of Volunteer Work (Manual)* is intended to assist the global community in using standardized measurement tools to produce statistics on the impact of volunteer work. The core data elements in the ILO *Manual* could be adapted to measure volunteer engagement in the G+L program: number of volunteers, number of hours volunteered, type of work performed, institutional setting of work performed, and the industry in which the volunteer work is performed. For example, the type(s) of G+L activity participated in, frequency of participation, and the health organization and department of each volunteer are useful data elements to include in the monitoring and assessment framework of the G+L program.

Table I includes outcomes and metrics selected from the Impact Framework™³ that are customizable to the G+L context. Mission Measurement and Starbucks Coffee Company convened a summit with leaders in non-profit and corporate volunteerism in January 2010 to develop a measurement framework for the business value and social impact of volunteerism. Some of the participating organizations at the Summit were UN Volunteers, Microsoft, Global Corporate Volunteer Council, World Food Programme, and Nike. Key research themes included current measurement approaches are incomplete, insufficient capacity to measure corporate volunteer programs, and multivariate volunteerism impact (Mission Measurement, 2011). In addition to the research shared at the Summit, collaborative thinking among attendees produced the Impact Framework™ which includes four impact areas (volunteer, non-profit, corporate, and community) to measure volunteer service.

Table 1: Selected Outcomes and Metrics from the Impact Framework™

VOLUNTEER PROFESSIONAL BENEFITS		VOLUNTEER PERSONAL BENEFITS		NON-PROFIT CAPABILITIES		CORPORATE EMPLOYEES	
Outcome	Metrics	Outcome	Metric	Outcome	Metric	Outcome	Metric
Improve development of professional skills	# and % of volunteers reporting improved skills due to volunteer experience	Enhance social network	% of volunteers indicating relationships built through experience	Increase awareness of key issues	% target population aware of issue	Increase employee engagement	% change in employee retention

³Mission Measurement. (2011, Jan). *Making it count: How to measure the impact of volunteerism*. <https://missionmeasurement.com/wp-content/uploads/Measuring-the-impact-of-volunteerism.pdf>

Environmental Scan

As a member of Practice Greenhealth, EES has access to Engaged Leadership resources including sustainability benchmark reports and sustainability program best practices. Practice Greenhealth (2021) defines its network as being “comprised of hundreds of hospitals, health systems, and other health care related organizations and companies dedicated to advancing sustainable operations and transforming health care”.

The *2019 Sustainability Benchmark Data* report⁴ includes a component on Engaged Leadership to allow Practice Greenhealth members to benchmark their program’s performance against others. In doing so, the LMHOs have appointed someone to lead sustainability efforts at the facility and system levels, have leadership commitment via the LMHO Sustainability Policies, have implemented annual sustainability reporting via the EPARs and the Carbon Neutral Action Reports, and have developed communication and education strategies to convey the organization’s sustainability initiatives via the GreenCare Network. When examining the finance section of the *2019 Sustainability Benchmark Data* report, the LMHOs are successful because there is a sustainability program budget and the Sustainability Innovation funding initiative has been developed. However, the benchmark data on Engaged Leadership also includes a section on Human Resources. In this section, the LMHOs have included questions about environmental stewardship in the 2019 GreenCare Survey. The LMHOs have not “added sustainability measures into performance objectives/evaluations for leadership staff”, “included an overview of organization sustainability goals in new employee orientation”, or “added language to job descriptions on the organization’s commitment to the environment and the role that each employee plays” (Practice Greenhealth, 2019).

The Centre for Climate and Energy Solutions (C2ES) produced the report *Best Practices in Sustainability Engagement* in 2015⁵, which was informed by corporate partners and practitioners. The report includes case study descriptions of employee engagement programs in the United States. For example, the United States Postal Service runs a similar workplace leadership program to G+L, called the Lean Green Team initiative.

The C2ES reports four main elements of successful engagement efforts: education, empowerment, a strong call to action, and recognition. The G+L program provides accessible and credible

⁴ Practice Greenhealth. (2019). *2019 Sustainability Benchmark Data*.
<https://practicegreenhealth.org/topics/engaged-leadership>

⁵Centre for Climate and Energy Solutions. (2015). *Best practices in sustainability engagement*.
<https://www.c2es.org/site/assets/uploads/2017/10/C2ES-Best-Practices-Sustainability-Engagement.pdf>

information to health care staff so that they are aware of sustainability-related topics and opportunities for action in the workplace (education). G+Ls are empowered to engage with orientation and training sessions, in addition to program resources such as workplace sustainability toolkits and project funding (empowerment). There are obstacles to action such as the intense workloads of health care staff, the nature of change among staff across departments/units at health facilities, and the lack of management support to do volunteer work. C2ES (2015) defines a successful call to action as inviting, clear, and well-communicated. Given the 2019 GreenCare Survey results, there is more work to be done on building a culture of sustainability across the LMHOs (call to action); 53% of respondents are not familiar at all with the impact of climate change on health care (1,004 responses), 67% of respondents are not familiar at all with the GreenCare Initiative (1,285 responses), and 69% of respondents are not familiar at all with the G+L program (1,309 responses). Lastly, the G+L program does provide positive reinforcement for G+L change makers, as the G+L network celebrates their impacts at Annual Recognition Summits and throughout the year in LMHO channels such as stories shared in the intranets (recognition).

The items in the *Environmental Employee Engagement Roadmap*⁶ checklist are also echoed by the engagement literature and among comparable organizations such as Practice Greenhealth and the C2ES. For example, the engagement literature supports the development of meaningful employee segments. EES is interested in implementing a ladder of engagement for G+Ls to better track staff volunteers. The ladder may range from passive members who engage with the G+L newsletter, to active members who are trained G+Ls engaged in activities, and finally up to G+L Leaders who are strategic partners in taking action to address sustainability issues in health care.

Database Management Software Solutions

EES Needs Assessment

EES is interested in exploring software platforms to support stakeholder engagement and relationship management in the G+L program and wider GreenCare Network. Based on research conducted on highly rated database management tools, customer relationship (CRM) management software and stakeholder relationship management software (SRM) platforms are most appropriate for EES. There are many software products on the market and each product comes with unique features, drawbacks, and pricing. For example, many CRM platforms are full-featured converting leads, managing deals and offering extended tools for sales, marketing, and

⁶TD Bank, Environmental Defense Fund Climate Corps & Brown Flynn. (n.d.). *Environmental employee engagement roadmap*. <http://edfclimatecorps.org/sites/edfclimatecorps.org/files/eeeroadmapfinal.pdf>

customer service. For more information refer to Appendix C which includes an overview of three suitable CRMs for EES. There are many features included in costly business suites that are not applicable to EES and the G+L program. Given the sales and marketing focus of CRMs, EES is also considering SRM platforms. For more information refer to Appendix D which includes an overview of two suitable SRMs for EES.

Important software features include ability to segment contacts, relationship management, event management, automatic reporting and analytics, and data compliance and security. Given the nature of collaboration across EES, it is important that a software solution have ease of use for multiple users. The contact management feature would help EES recruit new volunteers to the G+L program, using website forms that capture contacts automatically, while also maintaining up-to-date contact information of current G+Ls. The ability to record stakeholder interactions in a centralized repository would provide EES with an audit trail of tasks and activities. Automating data entry of participation in G+L activities, via an event management feature, would support EES in the assessment of volunteer engagement levels. Overall, CRM/SRM capabilities would save EES staff time and improve collaboration with centralized, accessible, and traceable stakeholder information.

Recommendations

This initial needs assessment and review has identified several software solutions for the G+L program. CRM software tends to focus on sales and marketing, which is not needed by EES, while also offering contact and event management tools. CRM WordPress Plugins are likely the least suitable as they offer limited support and may add unnecessary technical issues to the GreenCare website. Neon CRM is a top choice because of the functionality of its features, especially for volunteer management, in addition to available software support. SRMs are similar but offer a wider scope for managing complex and long-term stakeholder relationships across the GreenCare Network. Connecting with a salesperson will allow EES to ask specific questions of the software features. Based on the research conducted for the project, Neon CRM, Engagement Hub, and SMART are the top three software platforms that require product demonstrations to assess the interface, ease of use, and compatibility with the needs of EES.

Next steps for G+L database recommendations include consultations with Rebecca McNeil, Together digital strategist, and Brandy Svendsen, CEO, Creative Director and co-founder of Be the Change Group. Both Rebecca and Brandy have been working with EES on the GreenCare website redevelopment project for over a year and have offered to support the CRM/SRM audit and assessment given their expertise in design and development and strategy and communications.

Green+Leaders Monitoring and Assessment Framework

The G+L Monitoring and Assessment Framework (G+L Framework) has been developed in collaboration with G+L Program Leads to measure program performance. The G+L program requires goals, metrics to serve as tools for identifying areas of success and areas of improvement, and established targets and reporting processes. The G+L Framework is a work in progress as EES is undergoing strategic refresh, and the metrics and targets will be adapted to support reporting efforts. Further action includes collective and reflective inquiry with G+Ls, particularly on the proposed goals and strategies. For an examination of the G+L Framework refer to Appendix E.

To gather data on engagement, the G+L Framework requires self-reported surveys and a CRM/SRM tool to reduce the administrative workload of tracking program metrics and targets. An annual G+L survey would help EES to measure intangible emotions like volunteer engagement level, using proxies such as self-reported levels of pride and commitment and improved knowledge of sustainability competencies. Surveys should also be administered after orientation and training sessions for volunteer input. There is value in repeating questions from the 2019 GreenCare Survey as it would equip EES with baseline data on engagement for the wider GreenCare Network.

Summary

The project summarizes best practices for employee and volunteer engagement in order to support EES in measuring and evaluating the effectiveness of the G+L program. As a result, the G+L Framework has been created to better understand and analyze program activities and desired impacts. Implementing a CRM/SRM platform presents an opportunity for EES to strengthen G+L engagement through software designed to streamline tracking and reporting processes. By managing the G+L program, EES plays a significant role in fostering a workplace culture that encourages and supports health care staff to get involved in sustainability-related activities and initiatives. G+Ls are empowered to be highly engaged because of sustained program resources across the LMHOs, which includes workplace project funding and education and training from internal and external stakeholders of EES.

References

- Ababneh, O. M. A. (2021). How do green HRM practices affect employees' green behaviors? The role of employee engagement and personality attributes. *Journal of Environmental Planning and Management*, 64(7), 1204-1226.
- Ababneh, O. M., LeFevre, M., & Bentley, T. (2019). Employee engagement: development of a new measure. *International Journal of Human Resources Development and Management*, 19(2), 105-134.
- Ababneh, O. M. A., & Macky, K. (2015). The meaning and measurement of employee engagement: A review of the literature. *New Zealand Journal of Human Resources Management*, 15(1), 1-35.
- Casey, D., & Sieber, S. (2016). Employees, sustainability and motivation: Increasing employee engagement by addressing sustainability and corporate social responsibility. *Research in Hospitality Management*, 6(1), 69-76.
- Cantor, D. E., Morrow, P. C., & Montabon, F. (2012). Engagement in environmental behaviours among supply chain management employees: An organizational support theoretical perspective. *The Journal of Supply Chain Management*, 48(3), 33–51.
- Chacko, S., & Conway, N. (2019). Employee experiences of HRM through daily affective events and their effects on perceived event-signaled HRM system strength, expectancy perceptions, and daily work engagement. *Human Resource Management Journal*, 29(3), 433-450.
- Einolf, C. (2018). Evidence-based volunteer management: a review of the literature. *Voluntary Sector Review*, 9(2), 153-176.
- Engagement Hub. (2021). *Your complete stakeholder engagement and management software*. Engagement Hub. <https://engagementhub.com.au/>
- Eystad, M. (1997). Measuring the difference volunteers make: A guide to outcome evaluation for volunteer program managers. Minnesota Department of Human Services, 40.
- Freshworks Inc. (2021). Freshworks CRM. <https://www.freshworks.com/freshsales-crm/>
- Government of Canada. 2013 General Social Survey on Giving, Volunteering and Participating. Retrieved from <https://www150.statcan.gc.ca/n1/pub/89-652-x/89-652-x2016004-eng.htm>
- Harp, E. R., Scherer, L. L., & Allen, J. A. (2017). Volunteer engagement and retention: Their

- relationship to community service self-efficacy. *Nonprofit and voluntary sector quarterly*, 46(2), 442-458.
- Huertas-Valdivia, I., Llorens-Montes, F. J., & Ruiz-Moreno, A. (2018). Achieving engagement among hospitality employees: A serial mediation model. *International Journal of Contemporary Hospitality Management*.
- International Labour Organization. (2011). *Manual on the measurement of volunteer work*. https://www.ilo.org/wcmsp5/groups/public/---dgreports/---stat/documents/publication/wcms_162119.pdf
- Jabbour, C. J. C., Jugend, D., de Sousa Jabbour, A. B. L., Gunasekaran, A., & Latan, H. (2015). Green product development and performance of Brazilian firms: measuring the role of human and technical aspects. *Journal of Cleaner Production*, 87, 442-451.
- Kahn, W.A. (1990). Psychological Conditions of Personal Engagement and Disengagement at Work. *Academy of Management Journal*, 33(4), 692.
- Kanste, O. (2011). Work engagement, work commitment and their association with well-being in health care. *Scandinavian journal of caring sciences*, 25(4), 754-761.
- Kwon, K., & Kim, T. (2020). An integrative literature review of employee engagement and innovative behavior: Revisiting the JD-R model. *Human Resource Management Review*, 30(2), 100704.
- Macey, W. H., & Schneider, B. (2008). The meaning of employee engagement. *Industrial and organizational Psychology*, 1(1), 3-30.
- Maximizer Services Inc. (2021). Maximizer CRM. <https://www.maximizer.com/>
- Mission Measurement. (2011, Jan). Making it count: How to measure the impact of volunteerism. <https://missionmeasurement.com/wp-content/uploads/Measuring-the-impact-of-volunteerism.pdf>
- Neon One, LLC. (2021). *Nonprofit CRM software designed to support relationships that last*. Neon One. <https://neonone.com/products/nonprofit-crm-software-neon-crm/>
- Pham, N. T., Tučková, Z., & Jabbour, C. J. C. (2019). Greening the hospitality industry: How do green human resource management practices influence organizational citizenship behavior in hotels? A mixed-methods study. *Tourism Management*, 72, 386-399.
- Practice Greenhealth. (2019). *2019 Sustainability Benchmark Data*. Engaged leadership. <https://practicegreenhealth.org/topics/engaged-leadership>
- Rana, S., & Ardichvili, A. (2015). Employee engagement instruments: A review of the literature. In UFHRD Conference 2015, University College Cork.

- Rehnborg, S. J., & Moore, M. (2012). Maximizing volunteer engagement. *The volunteer management handbook: Leadership strategies for success*, 103-124.
- Renwick, D. W., Redman, T., & Maguire, S. (2013). Green human resource management: A review and research agenda. *International journal of management reviews*, 15(1), 1-14.
- Rich, B. L., Lepine, J. A., & Crawford, E. R. (2010). Job engagement: Antecedents and effects on job performance. *Academy of management journal*, 53(3), 617-635.
- Robinson, D., Perryman, S. & Hayday, S., (2004). The Drivers of Employee Engagement. IES Report 408: Institute for Employment Studies.
- Saratun, M. (2016). Performance management to enhance employee engagement for corporate sustainability. *Asia-Pacific Journal of Business Administration*.
- Schaufeli, W.B., Salanova, M., González-romá, V. et al. (2002). The measurement of engagement and burnout: A two sample confirmatory factor analytic approach. *Journal of Happiness Studies* 3, 71–92.
- Soane, E., Truss, C., Alfes, K., Shantz, A., Rees, C., & Gatenby, M. (2012). Development and application of a new measure of employee engagement: the ISA Engagement Scale. *Human resource development international*, 15(5), 529-547.
- Srivastava, D. K., & Bansal, N. (2016). Creating employee engagement in organizations in India: Role of human resource processes. *International Journal of Innovative Research and Development*, 5(6), 41-47.
- Syrenis Ltd. (2021). SMART stakeholder management and relationship tool.
<https://smart.syrenis.com/>
- Traeger, C., & Alfes, K. (2019). High-performance human resource practices and volunteer engagement: the role of empowerment and organizational identification. *VOLUNTAS: International Journal of Voluntary and Nonprofit Organizations*, 30(5), 1022-1035.
- Trent, S. B., Allen, J. A., & Prange, K. A. (2020). Communicating our way to engaged volunteers: A mediated process model of volunteer communication, engagement, and commitment. *Journal of Community Psychology*, 48(7), 2174-2190.
- Velez-Castrillon, S., White, S., & Brown, E. (2018). Human Resources Development: A Proposal for Engagement in Sustainability. *A Journal of International Academy of Business Disciplines, Quarterly Review of Business Disciplines (QRBD)*, 5(3), 183-198.

Appendices

Appendix A Selected Definitions of Engagement

Author(s)	Definition	Research Type	Measure	Participants
Kahn (1990)	“The harnessing of organizational members’ selves to their work roles; in engagement, people employ and express themselves physically, cognitively, and emotionally during role performances” (Kahn, 1990, p. 694).	Empirical	Untitled tool (a 14- item scale), In- depth interviews, and observation.	16 summer camp counsellors and 16 employees of an architecture firm in the United States of America
Schaufeli et al. (2002)	“Engagement is defined as a positive, fulfilling, work-related state of mind that is characterized by vigor, dedication, and absorption. Vigor is characterized by high levels of energy and mental resilience while working, the willingness to invest effort in one’s work, and persistence even in the face of difficulties. Dedication is characterized by a sense of significance, enthusiasm, inspiration, pride, and challenge. Absorption is characterized by being fully concentrated and deeply engrossed in one’s work” (Schaufeli et al. 2002, p. 74).	Empirical	Utrecht Work Engagement Scale (UWES)	314 students selected from the University of Castell and 619 employees selected from 12 public and private organizations in Spain
Robinson et al. (2004)	“A positive attitude held by the employee toward the organization and its values. An engaged employee is aware of the business context, works with colleagues to improve performance within the job for the benefit of the organization. The organization must work to nurture, maintain and grow engagement, which requires a two-way relationship between employer and employee” (Robinson et al., 2004, p. 3).	Empirical	A twelve-item scale that measures the 12 engagement statements of Institute Employment Studies (IES).	10024 respondents selected from 14 organizations within the National Health Service in the United Kingdom
Kanste (2011)	“Engagement is an affective-motivational state, refers to an individual’s cognitive ability to be energetic and resilient at work as well as persistent in difficulty times” (Kanste, 2011, p.760).	Empirical	Utrecht Work Engagement Scale (UWES)	435 respondents selected from 4 hospitals and 14 health centers in Finland

Appendix B Selected Measures of Engagement

Type of Scale	Author(s)	Title	Definition	Sample Items
Nine-item questionnaire; seven-point scale ranging from 'strongly disagree' to 'strongly agree'	Soane et al. (2012)	The Intellectual, Social, Affective (ISA) Engagement Scale	The ISA Engagement Scale proposes three underlying facets of engagement: intellectual, social and affective.	<i>I focus hard on my work (Intellectual). I share the same work values as my colleagues (Social). I feel energetic in my work (Affective).</i>
17-item questionnaire seven-point scale ranging from 'never' to 'always/everyday'	Schaufeli et al. (2002)	The Utrecht Engagement Scale (UWES)	Engagement is defined as "a positive, fulfilling, work-related state of mind that is characterized by vigor, dedication, and absorption" (Schaufeli et al. 2002, p. 74).	<i>I find the work that I do full of meaning and purpose (Dedication). I am immersed in my work (Absorption). At my work, I always persevere, even when things did not go well (Vigor).</i>
A 12-item scale that measures the 12 engagement statements of Institute Employment Studies (IES).	Robinson et al. (2004)	Untitled	"A positive attitude held by the employee toward the organization and its values...engagement requires a two-way relationship between employer and employee" (Robinson et al., 2004, p. 3)	<i>I speak highly of this organisation to my friends (Organizational pride). I find that my values and the organisation's are very similar (Common values).</i>
18-item questionnaire; five-point scale ranging from 'Strongly Disagree' to 'Strongly Agree'	Rich et al. (2010)	Untitled	The tool measures cognitive, emotional, and physical dimensions of engagement	<i>At work, my mind is focused on my job (Cognitive). I am enthusiastic in my job (Emotional). I work with intensity on my job (Physical).</i>

Appendix C Suitable CRMs for EES

CRM	FUNCTIONALITY & FEATURES	SECURITY & COMPLIANCE	SOFTWARE SUPPORT	PRICING
<p>Freshworks Inc. (2021):</p> <p>Freshworks CRM</p>	<p>Growth CRM has core tools such as contact management and website integration</p> <p>Activity timeline has chronological view of customer’s engagement</p> <p>Track interactions and manage and organize contacts with lists and segments</p> <p>Web forms</p> <p>Includes limit on 1,000 marketing contacts who you engage with through marketing campaigns</p>	<p>Data security includes ISO certified, AICPA-certified, Cyber Essentials certified and Cloud Security Alliance</p> <p>Virtual private cloud</p> <p>AES 256 bit encryption for data at Rest and HTTPS with TLS 1.2 encryption for data in transit plus data back up</p>	<p>Admin guide for setup</p> <p>Online chat, phone, and email support</p> <p>Submit ticket form to describe your problem/question</p>	<p>EES would likely use the “Growth: for small and fast growing businesses that need an all-in-one CRM” (Freshworks Inc., 2021), which is the least expensive tier at \$35 per user per month, billed monthly</p> <p>21-day free trial</p>
<p>Maximizer Services Inc. (2021):</p> <p>Maximizer CRM</p>	<p>Centralized place for contact information that allows you to create custom fields and tabs, and set permissions on who can view or edit details, log calls, save emails</p> <p>Contact management, schedule meeting, time a task, schedule a to-do, avoid missed follow-ups, duplicate record checking</p> <p>Find a contact history, see past conversations and correspondence, and future action</p> <p>Create trackable, automated campaigns and reporting, send personalized mass emails, manage opt-ins and unsubscribes</p>	<p>ISO 9001 and 27001 certification for data security</p> <p>Added security (SSSO Login and SAML SSO) with Business Plus tier</p>	<p>Manage on premise or in cloud</p> <p>Maximizer CRM support (onboarding package, chat and phone) with Business Plus tier</p>	<p>Pricing is billed annually:</p> <p>Small Office \$29 per month per user</p> <p>Business Plus \$49 per month per user adds: Mailchimp integration, campaign tracking, more storage (1GB vs 10GB), security and support</p>

<p>Neon One LLC (2021): Neon CRM</p>	<p>Volunteer and event management:</p> <ul style="list-style-type: none"> • Allows user to track individual volunteer preferences and data • Attendee tracking • Event registration • Volunteer sign-up forms for your organization’s website • Time tracking for volunteer hours • Integrations with Mailchimp and Eventbrite <p>Marketing and communications like campaign emails</p> <p>Donor management:</p> <ul style="list-style-type: none"> • Fundraising features • Built-in dashboards, one-click reports and custom reporting <p>Smart deduplication</p>	<p>All data is encrypted during transmission using SSL (HTTPS) and at rest using industry best practices</p> <p>Partner with Amazon Web Services for server infrastructure and allow customers to backup data locally</p> <p>PCI-compliant</p> <p>99.9% uptime</p>	<p>Initial onboarding</p> <p>Support Center has step-by-step instructions and how-to articles</p> <p>Technical support is ticket-based</p> <p>Billing support by phone or email</p>	<p>Essentials package starts at \$99 per month</p> <p>Impact package starts at \$149 per month and includes all the capabilities of Essentials and additional support and fundraising options</p>
---	---	--	---	---

Appendix D Suitable SRMs for EES

SRM	FUNCTIONALITY & FEATURES	SECURITY & COMPLIANCE	SOFTWARE SUPPORT	PRICING
Engagement Hub (2021): Engagement Hub	Import databases (offline stakeholder) User registration (convert to online stakeholder) Stakeholder segmentation: <ul style="list-style-type: none"> • Search stakeholders by custom segments • Individual stakeholder history Email/newsletters to targeted stakeholders System generated emails e.g. sent email notification when a user RSVPs to an event Events registration tool to notify and register users in workshops and events Data-driven reporting e.g. active users and user demographics Participation tools like quick polls, survey, forum/Q&A Multiple projects	Cloud-based solution backed by a 99.99% uptime – software server is monitored 24/7 Secure Dedicated Data Centre located in Sydney, Australia Data is encrypted end-to-end Daily backups to centralized storage system (RAID 10 array) Data is not shared with Engagement Hub or any third party	Standard support includes: 24/7 Help Desk 2 hour screen share meeting/training to get started 1 hour virtual training and/or advice per month Access to online support resources Premium service package also available	Quote is CAD \$5,400 per annum Book a free online demonstration

<p>Syrenis Ltd. (2021): SMART</p>	<p>Stakeholder management with tags for each stakeholder’s records and ability to build detailed profiles of your key stakeholders</p> <p>Tagging function for stakeholders to view/select those attached to custom tags Event planner tool sends event invitations from SMART and tracks when recipients click accept or reject invite. Use tags for non-responders to make it easy to send follow-up emails</p> <p>Organization and person-level view of engagement from email response data and user activity reports</p> <p>Scheduled communications</p> <p>Response reporting: each time a stakeholder is sent an email their contact history is updated with clicks, reads, and bounces</p> <p>Report writer tool generated PDF document or CSV files using any combination of tags, events, stakeholders</p> <p>Load data directly from a data file or spreadsheet</p> <p>Data selection tool allows individual or stakeholder list selection by business unit, location or organization</p>	<p>Cloud-based application</p> <p>Complies with: The General Data Protection Regulation (GDPR), Privacy and Electronic Communications Regulations 2003, Freedom of Information Act 2000</p> <p>ISO certification</p> <p>All data is held in ISO 27001 certified data centres which include state of the art Firewalls, and all database activity is recorded</p> <p>Continuous data backup and weekly secure off-site backups (disaster recovery plan)</p>	<p>Guaranteed 8 hour response on all support issues</p> <p>Help manual available</p>	<p>Sent a pricing quote request</p> <p>Book a free online demonstration via website</p>
--	---	--	--	---

Appendix E Green+Leaders Monitoring and Assessment Framework

Goal	Strategy	Metric	Baseline	Target (2021-2022)	Risk	Resources	Monitoring Frequency	Tools
INFORM: Provide opportunities for staff to learn more about sustainability in health care	Share stories about sustainability in health care	# of stories shared via the website & health organization intranet sites	N/A	3 stories per quarter	Lack of staff resource to write stories	Staff time; \$5k (budget for writer)	Quarterly	WordPress; intranet site access
	Distribute GreenCare E-Newsletter	E-Newsletter click rate	8% click-rate (2019)	12% click-rate	Cost of database management software tool	Staff time; Mailchimp	Quarterly	Mailchimp
	Manage GreenCare website as a hub for staff to learn about and take action on sustainability in their workplace	# of GreenCare website visits	N/A	N/A	Lack of resources to keep website updated and fresh to attract visitors	Staff time to update website	Quarterly	Website
	Offer and promote Lunch & Learns with a variety of EES focus area topics	# of staff attending	N/A	15 attendees per quarter	Lack of resources to promote sessions; staff lack time to attend	Venue & catering budget; staff time	Quarterly	CRM/SRM

Goal	Strategy	Metric	Baseline	Target (2021-2022)	Risk	Resources	Monitoring Frequency	Tools
	Encourage staff to sign up for the GreenCare Network mailing list	# of GreenCare mailing list subscribers	N/A	10 new subscribers quarterly	WordPress back-end issues	Staff time	Quarterly	Website; CRM/SRM
MOTIVATE: Provide opportunities for staff to become highly engaged in workplace sustainability initiatives	Promote G+L program and recruit new members	# of staff registering to become G+Ls	N/A	N/A	Lack of staff time to participate; lack of resources to promote program	Staff time; \$1k (venue & catering budget)	Quarterly	Learning Hub; website; CRM/SRM
	Promote and implement Sustainability Innovation funding initiative	# of workplace projects funded across LMHOs	8 (2020)	12 projects funded annually	Lack of resources to manage projects; budget constraints	\$40K; staff time	Annually	Excel (for project and budget tracking)
	Provide toolkits for G+Ls to implement workplace sustainability projects	# of toolkits downloaded	N/A	20 downloads per quarter	Lack of resources to manage projects; budget constraints	Staff time	Quarterly	Website google analytics

Goal	Strategy	Metric	Baseline	Target (2021-2022)	Risk	Resources	Monitoring Frequency	Tools
EMPOWER: Empower G+Ls to apply their sustainability leadership capabilities in health care	Offer training modules to G+Ls to further their change and project management skills	% of G+Ls reporting improved knowledge/skills due to training modules	N/A	50% of G+Ls report improved knowledge/skills	Lack of resources to reliably track the metric in a timely way; Measurement error	Staff time	Annually	G+L Annual Survey
	Promote G+L involvement in GreenCare sustainability or related committees	# of G+Ls registered for committees	N/A	N/A	Lack of staff time to participate	Staff time	Annually	Website; intranet sites
CONNECT: Encourage and support G+L peer collaboration	Offer and promote Coffee Conversation sessions	# of G+Ls attending	N/A	32 G+Ls attend (8 per session per quarter)	Lack of resources to reliably track the metric in a timely way	Staff time	Annually	CRM/SRM; Zoom or Microsoft teams
	Connect G+Ls together to share experience and learnings	% of G+Ls indicating enhanced social network built	N/A	50% of G+Ls report enhanced relationships built	Cost of database management software tool	Staff time	Annually	G+L Annual Survey

Goal	Strategy	Metric	Baseline	Target (2021-2022)	Risk	Resources	Monitoring Frequency	Tools
RECOGNIZE: Recognize G+Ls for their contributions, time, and leadership	Organize G+L Annual Recognition Summit	# of G+Ls at the Annual Recognition Summit # of Managers/Supervisors of G+Ls attending the Annual Recognition Summit	N/A	100 G+Ls attend 30 Managers/Supervisors attend	Budget constraints; lack of staff time to attend	Staff time \$8-10k budget	Annually	Website; CRM/SRM;

* N/A Baseline data not yet available (GreenCare website undergoing refresh and/or data will be available next quarter in 2021).