



## **Volunteer Activities at Momentum Metropolitan: The Challenge of Monitoring and Evaluation**

In July 2020, Charlene Lackay, group corporate social investment (CSI) manager at financial services group, Momentum Metropolitan Holdings (Momentum Metropolitan) was considering how best to monitor and evaluate the activities of the Momentum Metropolitan Foundation volunteer programme. Pressure on funding made it critical to provide evidence of what the programme was achieving. She also knew that as CSI practitioners, her department tended to become invested in their projects and that they needed to be able to pull back and assess their efforts objectively.

But what would be the best way of doing this, given that the company had more than 15 000 employees at numerous job levels, a lack of resources in the human resource department, and that she had to respect privacy related to salary levels?

### **CSR in South Africa**

The term corporate social responsibility (CSR) was broadly used to refer to the voluntary involvement or investment by companies in projects that helped to advance the society or the community in which they operated.<sup>1</sup> CSR tended to focus on four pillars: environmental sustainability (impact of the business on the environment), philanthropy (for example, charitable giving and volunteerism); community commitment (involvement and development); and the workplace (business ethics, diversity and inclusion).<sup>2</sup>

The Broad-Based Black Economic Empowerment Act 53 of 2003, as amended by Act 46 of 2013 (B-BBEE Act), provided the legislative framework for B-BBEE in South Africa to address the legacy of apartheid and promote the economic participation of black people in South Africa. Under the B-BBEE Act, the minister of trade and industry issued Codes of Good Practice and these codes might be generic (i.e. of general application) or apply to a specific sector of the economy (sector codes that were developed by stakeholders in the relevant sector).<sup>3</sup>

To this end, the South African financial services sector, in which Momentum Metropolitan operated, was obliged to adhere to the Financial Sector Code (FSC). The Code set out a scorecard in terms of which companies could measure their contribution to socio-economic development and the financial consumer education elements of the B-BBEE Act. Socio-economic development and consumer education contributions consisted of monetary or non-monetary contributions implemented in favour of beneficiaries.<sup>4</sup>

The King IV Report on Corporate Governance also presented guidelines for South African businesses with which companies listed on the Johannesburg Stock Exchange (JSE) had to comply. These guidelines were based on the concept that there should be a common purpose to all human endeavours (including corporate endeavours), which was service to humanity.<sup>5</sup> In addition to these guidelines, there were also expectations

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*This case was prepared by senior lecturer Dr Bheki Moyo with research associate Stephanie Townsend. It is intended for classroom use only. It is not intended to demonstrate effective or ineffective handling of a business situation.*