Benchmarking Global Pro Bono’s Impact on Investment

Case Studies from the Common Performance Indicator Project

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## INTRODUCTION

### EY: EY VANTAGE AND EY-EARTHWATCH AMBASSADORS PROGRAMS

Generate Value for Participants and the Company

### FEDEX: GLOBAL LEADERSHIP CORPS

Set Participants Up to Succeed

### IBM: CORPORATE SERVICE CORPS

Generate Value for Participants and the Company

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Introduction

Companies are increasingly taking proactive steps to bridge societal and business needs through opportunities that generate mutually beneficial outcomes. Global Pro Bono (GPB), the practice of sending skilled employees on short-term assignments to work as consultants with local organizations in underserved communities, is a shining example of how companies are creating value that benefits communities, the business, and their employees. Within GPB programs, employees build the capacity of host clients to help them become more equipped to address community challenges before returning to their companies with new insights and skills.

One of the most significant trends PYXERA Global identified from its 2017 Global Pro Bono State of the Practice Benchmarking Survey—conducted among 21 companies that are implementing GPB programs, some for as long as 12 years—is that impact measurement is increasing in importance as companies seek to more clearly demonstrate the results of their GPB programs. Since 2014, there was a nearly 40 percent increase in companies measuring social impact, and an 11 percent increase in companies gauging the corresponding business impact of their programs.

In recent years, PYXERA Global has witnessed steady growth in attention to impact measurement. This is unsurprising, as sharing stories of impact improves buy-in both at the executive level, for continued program support, and at the employee level, for engagement and retention of existing employees as well as recruitment of prospective talent.

The growing interest in impact measurement coalesced in 2015 when several ICV Leadership Council members partnered to develop a shared framework to measure and benchmark GPB programs’ impact on host clients, communities, participants, and the companies themselves. Besides understanding individual program impact, the expectation for the framework was that it would enable the ICV Leadership Council to report on collective impact and provide pertinent reference materials for new GPB implementers.

ICV Leadership Council

Formed and facilitated by PYXERA Global since 2011, the International Corporate Volunteerism (ICV) Leadership Council is a global community of corporations that are implementing ICV programs, also known as Global Pro Bono. The goal of the Council is to promote the expanding field of ICV and highlight its impact on participants, corporations, and addressing global challenges. The ICV Leadership Council provides an opportunity for professionals in the field to network, share program experiences and best practices, and create new operating models that can lead to improved program and project-based performance.

2016 CPI PROJECT PARTICIPANTS

3M  CREDIT SUISSE  EY  FedEx
IBM  JPMorgan Chase & Co.  MARS
Medtronic  PEPSICO  SAP  gsk

4 | PYXERA Global
Building on this progress, in 2016, PYXERA Global piloted a Common Performance Indicator (CPI) project with the ICV Leadership Council. Eleven companies participated in the project by including proposed CPI questions in their participant and host organization surveys, which led to responses from 990 GPB participants and 349 host clients. The survey results were aggregated based on the 13 CPIs to compare and contrast pro bono programs. The indicators measure whether programs are achieving their desired impact, and include the following:

**Host Organization Impact**
1. Local client organization satisfaction with ICV program
2. Local client organization satisfaction with ICV impact on operational areas
3. Local client organizations reporting ICV support as change agent
4. Monetary value of support and valuation of impact
5. Lives Impacted

**Participant Impact**
6. Participant satisfaction with his/her contribution to the client organization
7. Participant job satisfaction
8. Participant skills or competencies
9. Participant motivation to perform

**Company Impact**
10. Participants reporting new ideas
11. Participants understanding of the company as a corporate citizen
12. Likelihood of participants telling others about the company
13. Line managers reporting participants’ professional growth and skills development

Following the pilot data aggregation, the four companies—EY, FedEx, GSK, and IBM—with the highest marks for key indicators agreed to share their best practices with the ICV Leadership Council members.* The four companies attribute high levels of impact on both communities served and their own companies to their GPB programs’ unique design and structure. The case studies below provide an account of each company’s approach to creating a GPB program that achieves its desired objectives for their company, as well as ideas on how other companies can replicate similar successes in their own programs.

### TIMELINE

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<th>2015</th>
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<td>PYXERA Global and the ICV Leadership Council’s Impact Working Group develop the CPIs framework to include indicator reference sheets, a reporting scorecard, and a process for CPI data collection, aggregation, and analysis.</td>
<td>CPI project is piloted with the participating companies collecting data for 12 indicators immediately upon their GPB project conclusions and for seven indicators nine months later.</td>
<td>2016 CPI data is aggregated and analyzed. Benchmarking reports are developed and knowledge shares are conducted by companies with leading scores for the ICV Leadership Council members. 2017 CPI data is collected.</td>
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*Note: the CPI pilot benchmarking scores can be found in the infographic attached to this report. However, specific scores for each participating company are confidential.*
Corporate responsibility (CR) is an integral part of EY’s business strategy, and its GPB portfolio is one way the professional services organization is exemplifying this commitment. The EY Corporate Responsibility Sabbaticals are a suite of four programs that provide immersive volunteer experiences that deliver EY services to entities that otherwise could not afford them. These immersive experiences include longer volunteer placements that engage EY’s employees, help develop leadership and business skills, and strengthen EY’s communities. The two programs benchmarked in the ICV Council’s CPI project are the EY Vantage program and the EY-Earthwatch Ambassadors program.

Since 2005, the EY Vantage program has sent high-performing, mid-career professionals to Latin America for six weeks to work one on one with high-impact entrepreneurs to help them address their businesses’ growth challenges. In contrast, the EY-Earthwatch Ambassadors program began in 2009 and sends high-performing, early-career professionals in teams of ten (one per geographic region at the firm) to Mexico and Peru on a week-long expedition to work with an entrepreneur on a skills-based project and to conduct environmental field research. The programs received high benchmark scores in the following areas of participant and company impact:

- Participant job satisfaction  
  [ CPI 7 ]

- Participant gaining business acumen  
  [ CPI 9 ]

- Participant reporting they are more likely to tell others about the company as a result of the program  
  [ CPI 12 ]

Kristen Gold, Assistant Director on the EY Americas Corporate Responsibility team and leader of all four Corporate Responsibility sabbatical programs, believes that internal communication about the purpose of the GPB programs, participant selection, and participant ownership of project scoping contribute to participants gaining full benefits from their experiences. The type of participant that EY looks for are top performers focused on achieving quality results. As Gold explains, “participants are high-performing, so they’re already invested in leveraging their experience to grow their leadership skills, including connecting the dots between what they learned on their projects and then what they can bring home to their teams.”
While participants may have a natural inclination to take full advantage of the program, EY’s messaging about the GPB program and its leadership framework are also instrumental in ensuring that participants get the most from their experiences. The messaging emphasizes the talent development aspect of the program, encouraging participants to “bring back what you learn to enhance or expand your role.” Additionally, the company uses an EY-specific leadership framework that helps participants identify the skills they’d like to focus on strengthening or learning during their experience—skills that EY has also identified as being key to developing its employees as agile, purpose-driven leaders—ultimately supporting their overall professional development.

Armed with the mindset to capture and absorb new information, EY’s participants scope and refine the projects themselves, together with the entrepreneurs they are supporting. This is different from other GPB programs, where the implementing partners typically define the scope of work. Gold mentions that working with entrepreneurs and developing these scopes of work lead to innovation upon the participants’ return home. She shares an example from one EY Vantage participant who “created a tool for the entrepreneur and talked with his manager about building that up further and offering it to clients.”

EY expects participants to share their stories with internal and external audiences upon returning to their home offices, and it provides participants with materials to facilitate presentations within their local networks. The company also publishes articles to highlight program participants and their experiences. Gold explains that this enhances employee pride and engagement with EY. Compared to their peers, the participants of EY’s GPB program also demonstrate “best-in-class employee engagement” and stay longer with the company.
FedEx: Global Leadership Corps

Set Participants Up to Succeed

Since 2011, FedEx has implemented the Global Leadership Corps (GLC), a program that sends teams of employees on four-week, skills-based assignments to underserved and growing markets around the world. GLC stood out among the companies participating in the CPI project due to its high benchmark scores for:

- Local client satisfaction with level of impact on operational areas [CPI 2]
- Participant skills development [CPI 8]
- Participants reporting new ideas [CPI 10]

Anita Angelacci, Senior HR Advisor at FedEx, attributes success in these areas to the GLC program’s focus on participant training and the strategic selection of scopes of work (SOW).1

One contributing factor for the high scores is the careful attention to setting participants up for success. As the GLC management team is aware that participants may be new to consulting or have limited international experience, they prioritize preparing participants with the tools they need to thrive during their assignments. Angelacci emphasized this point, saying, “We feel that it’s most important that we prepare our folks for this experience and what we try to do is remind them [about] a couple of things. One of them is that they are no longer going to be an employee—they’re going to be a consultant, and that’s a different mindset.”

Participants begin the transformation from FedEx employee to consultant by engaging in six weeks of virtual training. The trainings equip participants with a toolkit of resources they can pull from and use once they begin working with their assigned host client. For instance, the training curriculum introduces participants to Appreciative Inquiry (AI), a methodology developed at Case Western Reserve University that encourages an analysis of an organization’s strengths, followed by determining ways to replicate these successes to address organizational challenges. Instead of looking at an organization as lacking knowledge and focusing on deficiencies, it focuses on understanding the organization through a strengths-based assessment. Angelacci highlighted the importance of AI for GLC participants, saying that it is a way for participants to understand “what are the types of questions to ask, and how to work as a consultant.”

Participants also receive training on Quality-Driven Management2 (QDM), which draws on the best ideas and practices from many quality management philosophies—including Six Sigma, Lean, and Total Quality Management—to create an approach that is designed for a service business, rather than for a manufacturing one, and aims to make every FedEx customer experience outstanding. Participants also have opportunities to learn about strengths from their program colleagues who come from different operating companies within FedEx.

In addition to comprehensive virtual training, participants engage in a two-day, in-person orientation in Memphis about their broader mission to generate mutual benefit and contribute to FedEx’s commitment to social responsibility. While there, participants go to the FedEx Family House, a home where families of sick children from the nearby Le Bonheur Children’s Hospital can live free of charge while their child is receiving treatment at the hospital. Angelacci explained that the reason the GLC teams visit the family house is “so [the participants] get a feel for FedEx’s desire to be a part of the community, which helps to inform them about the spirit of the program.”

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1 Scope of Work (SOW) is a description of a project’s background, main activities, deliverables, and responsible parties that is developed before the participants are deployed on GPB assignments.
3 http://fedexcares.com/
4 http://fedexcares.com/
Beyond designing a training that both prepares participants with technical/consulting skills and inspires them to live FedEx’s social responsibility mission, the GLC program team associates the higher participant learning and host client impact with the careful selection of the scope of work.

The GLC program aligns SOWs with the six pillars of their corporate citizenship strategy, FedEx Cares: 1

1. **Delivering for Good**
2. **Sustainable Transportation**
3. **Employment Pathways**
4. **Road Safety**
5. **Global Entrepreneurship**
6. **Diversity and Inclusion**

During a thorough process to select host client organizations, the GLC team analyzes both the skill sets of their participants and the needs of the host client. While participant skill sets do not always exactly match the SOW, as Angelacci explained, “we make sure that we give [the participants] a statement of work so we know they can be successful and come away feeling like they can do more than they ever thought they could. So, it’s really a great opportunity to stretch their horizons.”

The GLC program contributes to FedEx Care’s mission “to invest $200 million in over 200 global communities by 2020 in order to create opportunities and to deliver solutions for people around the world.” 4 As seen from the CPI project, it also is more than a leadership development program. The GLC is a program that is generating value for the company, the participating employees, and the community.
How to Yield Scalable Triple Benefits

What does it take for a GPB program to yield a scalable triple benefit — to participants, the company, and the community? Since 2008, IBM has successfully demonstrated these benefits through its Corporate Service Corps (CSC) program. Each year, CSC sends approximately 30 teams of 12-to-15 IBM employees on four-week assignments. To date, the company has deployed 299 CSC teams, 3,400 participants, and assisted 1,200 host organizations. In the CPI project, IBM stood out among participating companies for its high benchmark scores in the following areas:

- Number of people impacted directly and indirectly [CPI 5]
- Participants gaining new teamwork, cultural awareness, and consulting skills [CPI 8]

IBM attributes the CSC program’s success and high benchmark scores to its strategic and intentional process of impact planning, participant training, and project selection.

CSC’s program process relies upon a Theory of Change methodology that links the program’s inputs, outputs, and outcomes to achieve a desired social impact. Rick Fernandez, CSC Program Manager at IBM, explained the Theory of Change, saying, “The inputs are the resources needed for the project. The outputs are the activities created from the inputs, and the impact is the effect of the outcome.” For CSC, the inputs include funding, participant training, and work with host organizations, while the outputs are CSC project deliverables and recommendations that participants deliver to their host clients. The outcomes are participant learning and increased capacity of the host organizations. Ultimately, impact is achieved with enhanced skill application and strategic knowledge, increased social media, and improved number of community members served or served better.

Important Foundations

PYXERA Global believes that employing a Theory of Change or a logical framework approach is an important foundation for any project or initiative’s impact planning, implementation, and evaluation of results. Both of these tools provide an at-a-glance view of how a project proposes to solve a problem, and serve as a living guidance for ongoing critical reflection on performance.
Fernandez described the social impact chain of results by explaining, “What communities get is a host organization that performs better, and then that leads to increased community impact. So, because the host organization that’s embedded in the community gets better at what it does, the community receives better services or deeper services or a mix of the above.” Basing CSC on this Theory of Change yields the desired triple benefit, which is also evidenced by aggregated survey responses completed by participants and host clients.

Using a scope of work defined by the host client, the CSC team works to increase the host client’s capacity through engagement and partnership over the course of a four-week assignment. IBM participants first receive training on topics such as teamwork, collaboration, and cultural awareness, and are then deployed to use their skills on a GPB assignment. Fernandez elaborated on the participant impact, stating that “the participants get a lot of training, and then they exercise those skills during their deployment and apply the [information technology] they are familiar with in new ways that deepens their knowledge of it.” Equipping GPB participants with a targeted training on the competencies IBM finds most important serves both the business and local communities.

IBM’s breadth of community impact also results from a strategic and intentional process of host client and project selection. While the majority of CSC projects focus on strengthening nonprofits, a substantial number of CSC’s host clients are governmental and educational institutions. Inherently, these institutions have a wide reach in the community as their services support a large number of people. Additionally, CSC selects projects that have organization-wide impact. Fernandez explained this in more detail, “We really try to be strategic in the support they (CSC participants) are offering the host organization. We don’t want to come in and support one discreet little thing that’s not going to support organization-wide impact because, whether it’s a single service-organization or a multi-service organization, the most impact we’ll have is if we help the organization as a whole so that they can provide services at a higher level either in quality or in outreach.”
Finding a GPB Program’s Participant Genes

One of the world’s leading pharmaceutical companies, GSK believes that it has found a successful GPB program formula. Clément Douault, GSK’s Global Volunteering Manager, explained that GSK’s volunteer strategy is to “drive change around three axes: one around community, one around self in the eyes of employees, and the last one around GSK.” Since the company started PULSE in 2009, it has invested over $32 million in this skills-based volunteering initiative where select employees are matched to a nonprofit for three or six months, full-time. Through this programming, GSK is making its desired social, individual, and business impact.

The Common Performance Indicator project analyzed the PULSE Volunteer Partnership and found this program to have high scores in the following areas:

- Participants gaining new skills (communication, innovative thinking, business & strategic planning, and adaptability skills, among others)
  [CPI 8]
- Participants reporting a better understanding of the company as a corporate citizen
  [CPI 11]

One notable statistic is that of the 73 employees who participated in the 2016 PULSE cohort, 100 percent of the survey respondents reported that they now better understand how GSK functions as a corporate citizen. This data helps to justify the investment in the GPB programs, a question that frequently surfaces.

GSK attributes these **strong results to a variety of its program characteristics**. This includes an intensive preparation/training of volunteers, a thoughtful matching process based on NGO needs, a system of line managers and participant check-ins, and the long-term immersive nature of the experience.

A critical factor of PULSE’s great results is also the participant recruitment framework. The company believes that having a core set of characteristics for what makes a successful corporate volunteer is the best way to select the right people for GPB programs. Characteristics that GPB program managers usually look for in participants are high performance and potential. As Douault remarked, performance should be considered, because without a proven ability to perform, candidates are going to struggle in an assignment. However, he makes the case that while the ‘potential’ of a person may be important for advancing at the company, it may not be necessarily sufficient for a GPB participant to be successful.

**Participant Selection**

Based on our experience conducting participant selection for some of our clients’ GPB programs, PYXERA Global believes that establishing clear selection criteria not only contributes to creating a transparent and well-documented participant selection process, but also helps to communicate expectations to potential GPB participants and helps to uncover candidates best exemplifying the qualities the program seeks to project.
Consequently, the GSK PULSE team set about determining the top qualities they believe make a successful PULSE candidate and settled on five criteria, known collectively as the PULSE Genes. The PULSE Genes are comprised of altruism, cultural sensitivity, people agility, flexibility, and resilience. As an example, altruism relates to a person’s passion to give back to the community. Douault believes that “by focusing on those five characteristics a GPB program will be able to identify corporate employees that have what it takes to be successful as a Global Pro Bono candidate.”

Along with searching for participants who exemplify the PULSE Genes, GSK also places an emphasis on ensuring that its partner organization’s needs are met. This starts with assessing the nonprofit’s requirements even before participant selection begins. Once these needs are identified, GSK looks at the applicant pool to determine which candidates have the necessary expertise, along with other factors like geographic preference and demonstration of the PULSE Genes. Selection of GPB participants based on nonprofit demand, as opposed to matching the needs of the host organizations to the pre-determined participant pool, is something that distinguishes the GSK PULSE program from many other GPB programs.
Closing Remarks

In 2016, PYXERA Global launched the Common Performance Indicator (CPI) pilot project with three primary objectives in mind: to (1) benchmark GPB program impact on participants, host organizations, and implementing companies; (2) report on the ICV Leadership Council’s collective impact; and (3) provide GPB indicator reference materials to companies new to the field. We are proud to report that the pilot successfully met these objectives and the project is moving to analyze 2017 data and collect 2018 data.

By building an evidence base of best practices in Global Pro Bono through the CPI project, we aspire to influence the smart growth of the practice. As demonstrated in the above case studies, companies that participated in the pilot gained an expanded understanding of Global Pro Bono that can serve to optimize existing programs and to explore new strategies. Two companies published their individualized CPI results in CSR reports/external communications, which shows additional value of the CPI project that is available to companies interested in GPB.

PYXERA Global would like to thank all the current participants of the CPI project, as collectively we are on the path to understanding successful Global Pro Bono models and the corresponding determinants of their success. With the objective of learning and improving in mind, we invite other companies implementing GPB programs to participate in the CPI project. Participating companies receive individualized CPI reports and presentations from members on the CPI leaderboard, and join a fellowship of companies advancing the practice area. With a greater pool of data, the analysis will paint a clearer picture of GPB.

For details on how to join the CPI project, please email Marieka Walsh at: mwalsh@pyxeraglobal.org

About the Authors

Tanya Gapeka is the Director of Monitoring, Evaluation, and Learning at PYXERA Global. Tanya is a project management and M&E specialist with over fourteen years of experience working with national and local governments, multinational corporations, non-governmental organizations, small and medium enterprises (SMEs), business development service (BDS) providers, banks, MFIs, and international donor agencies to address economically and socially sustainable development issues in growing economies. She has experience in NIS, Middle East, Africa, Asia and the Caribbean regions, and familiar with USAID, WB and private donor program administration, evaluation and reporting. Tanya holds an MPA degree from the George Washington University.

Marieka Walsh is a Program Coordinator at PYXERA Global where she assists in program management of Global Pro Bono projects. Marieka is passionate about community health and development. Prior to joining PYXERA Global, she served as a Peace Corps Volunteer in Mozambique (2013-2015). Her primary work involved health system strengthening and supporting the Elizabeth Glaser Pediatric AIDS Foundation’s HIV prevention, care and treatment programming at a District Health Center. Marieka holds a BA in International Relations from Mount Holyoke College and a MA in Public Administration from American University.
CPI Infographic

Want to learn more? Check out our Common Performance Indicator Summary Infographic.

Available online at: pyxeraglobal.org/icv-leadership-council