Developing leaders from within

The correlation between pro bono & skills based volunteerism and leadership development

Deloitte Touche Tohmatsu Limited
June 2014
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Glossary

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<tr>
<th>Acronyms, Abbreviations and Terms</th>
<th>Definition</th>
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<tr>
<td>PB</td>
<td><strong>Pro Bono.</strong> Professional work undertaken voluntarily and without payment or at a reduced fee as a public service. Pro bono (PB) service uses the specific business skills of professionals to provide services to those who are unable to afford them.</td>
</tr>
<tr>
<td>SBV</td>
<td><strong>Skills Based Volunteerism.</strong> Similar to pro bono, SBV is defined in this report as utilizing professional/business skills in the form of public service. This may include the type of work that is not typically charged to clients by a company. SBV programs tend to be shorter in general than traditional PB programs.</td>
</tr>
<tr>
<td>CSR</td>
<td><strong>Corporate Social Responsibility.</strong> Also referred to as corporate conscience, corporate citizenship, social performance, or sustainable responsible business/Responsible Business. This is a form of corporate self-regulation to ensure compliance with ethical, international and legal standards and often extended to social benefits for the community at large.</td>
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<tr>
<td>ROI</td>
<td><strong>Return On Investment</strong> is the concept of an investment of some resource yielding a benefit to the investor. A high ROI means the investment gains compare favorably to investment cost.</td>
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<td>L&amp;D</td>
<td><strong>Learning and Development.</strong> In the context of this document, term L&amp;D has been used for leadership development, we are referring to leadership development as a form of L&amp;D.</td>
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<tr>
<td>Company Size</td>
<td>In the context of this white paper, <strong>company size</strong> refers to the number of employees at an organization. This was considered a factor while studying successful implementation models of PB &amp; SBV.</td>
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This white paper provides insight into the benefits and impacts of PB & SBV on an employee’s leadership development and is intended for the following audiences —

- Corporate Social Responsibility teams at organizations across a variety of industry sectors, including Marketing/Communication, Technology, Banking/Finance, Professional Services, Healthcare, Transportation, Chemical, and Hospitality
- Human Resource managers involved in talent recruitment, performance management, talent retention, learning and development activities
- Non-profit organizations looking for best practices around partnering with companies, planning, implementing and measuring PB & SBV project
- Employees at all levels looking for opportunities to improve their leadership skills and experience
Overview: Pro Bono and Skills Based Volunteerism (“PB & SBV”) involves using individual or collective corporate expertise to support the work of a community group without charging a fee.

Situation: Non-profit organizations need business skills, although charities and community organizations mostly run on a not-for-profit basis, they face many of the same organizational issues and require many of the same skills utilized in the private sector to operate effectively. By 2015, A Billion + Change is looking to secure $5 billion in pledges of pro bono and skills-based service to meet this need.

Challenge: A compelling reason for companies to implement PB & SBV programs is the business ROI, including brand recognition, attracting new business, recruiting and retaining talent, employee engagement and leadership development. However, there is a need for sufficient research and data supporting these benefits to companies, and specifically a lack of evidence and research with respect to the correlation of leadership skills and PB & SBV.

Solution: The intellectual capital residing in companies is a significant source that can be leveraged to meet the business needs of non-profit organizations while benefiting participating companies by further developing its people.

Impact: Businesses who lend their support through PB & SBV noticeably realize they are building better business leaders for tomorrow. By showing a strong correlation between PB & SBV programs and leadership development through our research, we hope to help A Billion + Change increase the number of pledge companies and encourage them to drive more effective programs.
Objective and scope

The purpose and approach to our research
Objective and scope

**Overall Objective:**
Support A B+C’s 2015 vision of expanding the number of pledge companies by building a compelling case around how PB & SBV can be used as a leadership development opportunity.

**Scope:**
To focus our research even further, we narrowed the scope to determining how PB & SBV programs help companies to build leaders from within, coming up with a set of considerations for smaller companies to better position PB & SBV within a proven learning and development framework.
Research approach
Five phased approach with various activities

- Clarify expectations and scope
- Identify any challenges in meeting objectives
- Narrow project scope and research focus

- Identify research methodology
- Select companies for survey/interviews
- Define list of participants for inputs

- Define PB & SBV’s role in leadership development
- Showcase various PB & SBV models in practice
- Provide recommendations for successful implementation

- Define survey and interview questions through closed ended questions for quantitative analysis and open ended questions for qualitative analysis
- Existing research for reference or inputs

- Provide next steps on how this report can be used

- Formulate questions

- Finalize research approach and subjects

- Conclusions

- Data Analysis

- Identify primarily goal and research focus

- Provide metrics from closed ended questions
- Draft mini cases and considerations from open ended questions
Managed a systematic data collection, analysis and interpretation process by taking a mixed method approach for research:

**Quantitative Research:**
- Online survey with 26 diverse U.S.-based companies in industries such as Technology, Banking and Finance, Marketing/PR/Communications, Chemical, Healthcare, Professional Services, Hospitality and others.
- Participants include employees at various levels starting from staff, senior staff, Managers, Senior Managers, Vice Presidents and Directors.
- Identified impact on specific skills through scaled questions in online survey.

**Qualitative Research:**
- Scheduled follow up interviews with those who expressed interest, ranging from staff to Director level professionals.
- Identified mini cases during personal interviews with participants and leaders from various industries.

**Historical Data:**
- Referenced existing research material by various esteemed organizations.

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In 2012, U.S. companies increased their spending on leadership development by 14 percent.

— Bersin by Deloitte
Research findings

Data, metrics and cases supporting the correlation between PB & SBV and leadership development
Managerial skills

Majority of our respondents indicated a positive impact from PB & SBV

The most critical part of Managerial skills is Relationship Management and our research confirms that it had a significant and positive impact on our survey participants.
Leadership skills
Confidence, communication and problem solving are greatly impacted by PB & SBV

An improved sense of self-confidence is critical in leadership. The confidence to make decisions, commit to them and empower those who will drive the result of those decisions forward is required in any leadership role.
Survey statistics

Small sized companies were the most responsive to our survey.

- **31** Small size companies with less than 10,000 employees were invited to participate in the survey.
- **18** Small size companies responded to the survey.
- **20** Large size companies with greater than 10,000 employees were invited to participate in the survey.
- **7** Large size companies responded to the survey.
- **30%** Marketing/Communications/PR companies participated in the survey.
- **32%** Technology and Professional Services companies participated in the survey.
- **38%** Other types of companies from various sectors — Banking and Finance, Chemical, Transportation, Hospitality and Healthcare participated in the survey.
Survey statistics

Majority of the survey participants are at a leadership level

- Employees from various companies (large and small) at different levels (from staff to senior leaders) were invited to participate in the survey.
- Employees from various companies (large and small) responded to the survey.
- Employees at manager and leadership levels responded to the survey.
- Employees at staff and senior staff levels responded to the survey.
- Out of 39 survey respondents participated in follow up interviews and provided more input.

- 72 employees responded to the survey.
- 64% of employees responded to the survey.
- 36% of employees responded to the survey.
- 52% of employees provided more input.
- 34% of employees were staff.
- 66% of employees were senior staff.
## Survey statistics

Compared to traditional leadership development initiatives, PB & SBV is perceived as equally effective

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
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<tr>
<td>22%</td>
<td>Participants specified that PB &amp; SBV programs are <strong>less expensive</strong> than traditional leadership programs</td>
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<tr>
<td>13%</td>
<td>Participants specified that PB &amp; SBV programs <strong>cannot be compared</strong> with traditional leadership development programs</td>
</tr>
<tr>
<td>34%</td>
<td>Participants specified that PB &amp; SBV programs are <strong>similar</strong> to traditional leadership development programs</td>
</tr>
<tr>
<td>31%</td>
<td>Participants specified that PB &amp; SBV programs are <strong>better</strong> than traditional leadership development programs</td>
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Large and small size companies are encouraging **voluntary** based participation in PB & SBV.

Large and small size companies are encouraging **nomination** based participation in PB & SBV.

Participants loyalty and pride in an organization increases as a result of participating in PB & SBV activities.

— Participant, Small Healthcare Company, U.S.
Survey statistics
Benefits of PB & SBV observed by survey participants

- **100%** Positive and significant impact on company brand/PR
- **90%** Significant and positive increase in overall leadership skills
- **87%** Significant increase in innovation and creative thinking skills
- **82%** PB & SBV helps in attracting talent and recruitment
- **88%** Significant and positive increase in overall managerial skills
- **87%** Significant increase in project management skills

90 percent of surveyed corporate human resources executives believe that contributing business skills and expertise to a non-profit can be an effective way to develop leadership skills.

— Volunteer IMPACT Survey
Deloitte
Survey statistics
Various traditional leadership development programs

As the global leadership development manager, we have partnered with the skills-based program, integrating SBV into our formal leadership development programs. The results benefit our leaders, our communities, and our businesses.

— Program Leader, Large Science and Technology Company, U.S.

Both large and small size companies are utilizing various traditional leadership development programs in combination* for skills development of employees

* Since companies are using various programs in combination, percentages do not add up to 100

On the job learning 92%
Classroom based trainings 84%
Digital learning 69%
Co-creations with business schools 23%
Other ways - conferences and seminars 7%
Interview outcomes

Considerations and recommendations on PB & SBV models
PB & SBV projects
Interview feedback on successful implementation

Identify
Non-profit Partnership

Plan
Positioning
Alignment with organizational goals

Implement
Working with non-profit
Project and deliverables

Close
Volunteer Feedback
Measure impact and share learnings

It's a great way to teach younger, less experienced staff how to manage a project from start to finish.

— Manager, Global Communication and Business Strategy firm, U.S.
PB & SBV projects
Considerations for identifying and planning projects

Non-profit Partnership
- Select a non-profit that is credible and reputable; should be recognized globally, nationally, or regionally as a premier organization
- Evaluate whether the non-profit is clear about the problem or challenge it is facing. Help the non-profit in defining the problem, prioritizing their needs, and identifying the skill sets that would help them
- Identify projects that align to organization’s core values and will create a meaningful difference/lead to measurable social impact on community
- Select projects that can benefit from core competencies of your organization
- Match projects with time commitments suitable to employee working hours and other client commitments
- Set a clear timeline and project end date

Project Type
- Position it as a managerial or leadership development opportunity for employees and promote it accordingly within the organization
- Involve senior leaders in the process of individual employee coaching and mentoring

Positioning
- Business units should build PB & SBV into their annual planning and budgeting processes
- Establish goals, expectations and clear outcomes from the program for more effective measurement

Finding the right client/organization that knows what they need and the right PB & SBV volunteer fit (skills, personality, etc.) is essential to the program’s success.

— Manager, Marketing Consultancy Company, U.S.
PB & SBV projects
Considerations for implementing projects and measuring skills development

Working with non-profit
- Identify a single point of contact from the non-profit to resolve queries or concerns of volunteers
- Non-profits should involve volunteers in the decision making process in due course
- Help the non-profit by providing the right solution, clear recommendations, point of view and next steps; manage expectations appropriately

Project and deliverables
- Break large and complex tasks into smaller units
- Stay focused on main purpose/goal and prepare volunteers to handle scope creep
- Take responsibility and ownership of the project. Be honest, open, flexible and act based on client feedback
- Encourage employees to take measured risks and challenge themselves to think outside the box

Volunteer Feedback
- Mentors and coaches should provide valuable feedback to the volunteer’s supervisor
- Collect formal and informal feedback from volunteer on experience working with non-profit to assess/revisit ongoing partnership

Measure impact and share learnings
- Publicize the benefits of program to other organizations
- Measure the impact of the project on employee’s skill through pre and post assessments (with non-profit and employee); target the surveys to assess desired skill development
- Conduct project exit interview with participants for qualitative input and/or employee 360 feedback
- Share learnings with others through word of mouth, publishing personal stories on company website, intranet, newsletters, etc.
Working seamlessly
Considerations for companies and non-profits to maximize results

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<th>Identify</th>
<th>Plan</th>
<th>Implement</th>
<th>Close</th>
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<tr>
<td>Define key problems into simple problem statements</td>
<td>Provide problem statements to organizations that can lend required skills</td>
<td>Collaborate with volunteers and split the work into a list of small, clearly defined deliverables</td>
<td>Collaborate with volunteers, inspect and explore how the team has worked during the entire project life-cycle</td>
</tr>
<tr>
<td>Divide each problem into multiple sub-problems of same or related types such that sub-problems should be simple enough to solve directly</td>
<td>Confirm timeline, skills and resource commitment from organizations</td>
<td>Sort the list by priority so that high priority items are implemented first to minimize the risk to overall project delivery</td>
<td>With help from volunteers, document the learnings in terms of lessons learnt, best practices adopted, stories etc.</td>
</tr>
<tr>
<td>Prioritize a list (stack rank) of problems and Identify which ones are critical and could create immediate positive impact on society.</td>
<td>Manage larger projects by dividing them into sub-projects or stages. Projects should not be more than 3-4 months</td>
<td>Review the progress along with volunteers on weekly basis</td>
<td>Share the documents with other volunteers and non-profit organizations</td>
</tr>
<tr>
<td>Identify the skills that are needed to solve various problems</td>
<td>Define a list of “must have” and “nice to have” items for project deliverables</td>
<td>Assign a single point of contact to resolve all queries from volunteers</td>
<td>Measure the impact on skills development through one or more ways — discussion with participants, survey post project completion, discussion with PB &amp; SBV lead</td>
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Legend:
- **Non-profit responsibility**
- **Volunteer organization responsibility**

| Assign a single point of contact to resolve all queries from volunteers | Avoid frequent changes in the requirements during implementation to minimize impact on overall project plan |
PB & SBV Mini cases

Brief case studies captured through follow up interviews of survey participants
**Mini case**

Riggs Partners

<table>
<thead>
<tr>
<th>Company Size</th>
<th>Company Type</th>
<th>Name of the program</th>
<th>No. of people participated</th>
<th>Time Commitment</th>
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<tbody>
<tr>
<td>&lt; 10K employees</td>
<td>Marketing and Advertising</td>
<td>CreateAthon</td>
<td>50</td>
<td>24 hours</td>
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**Overview:** CreateAths are 24-hour, PB & SBV marathons held by local marketing, advertising and public relations groups with the purpose of providing marketing services for local non-profits, overnight. Over 16 years, it has grown exponentially to include not just ad professionals but also students, corporations, and creative organizations interested in using their skills and talent to create social change in their communities.

**Social Outcome:** Better marketing helps non-profits with following - changing behavior within society through better communication with masses and also helps in fundraising by attracting more donors.

Discovery channel's marketing division created their own program with name “Creating Change” after seeing Riggs Partners’ CreateAthon.

**Impact on leadership skills:**
Significant boost in confidence, innovation and creativity within volunteers.

**Impact on business skills:**
Helped in building and strengthening following skills—Marketing Strategy, Account Management, Client Interaction, and Team Management.

**Other benefits observed over a period:**
Positive PR, brand differentiator, helped in redefining the culture within the organization, attracted bright and young talent in the market, increased network with other potential clients and talent retention.

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**My first CreateAthon widened my leadership experience. It gave me a chance to put my feet into new activities for the first time, activities that were valuable to developing my industry skill set.**

— Will Weatherly, Participant
Riggs Partners
Overview: The non-profit Seattle Aquarium recognized the need for an intranet site to tackle its struggle with internal communication and collaboration. Employees were often unaware of key announcements and events. There was no central location for handbooks and policies. 100GB+ of files scattered across computers.

Social Outcome: Slalom delivered a simple, clean design using the latest Microsoft SharePoint technology for better internal communication and collaboration. From design and UX to development, Slalom’s PB & SBV portal team customized the site—dubbed AquaNet—to meet the aquarium’s requirements.

More information on this and other PB & SBV projects can be seen by clicking following—Larkin Street Youth, Child Care Resources, Hopelink, and Seattle Aquarium

Impact on leadership skills:
Significant boost in confidence, communication and influencing skills within volunteers.

Impact on business skills:
Positive impact on essential consulting skills—Project and Program Management, Business Analysis, Software Development, and gaining experience around specific technologies relevant to core business.

Other benefits observed over a period:
Positive impact on company brand/PR, reduced cost of other trainings, and talent retention.
Overview: At UHG, an Innovation Council was formed to work cross-enterprise, fostering new approaches and ways of thinking. In partnership with Talent Development and the Office of Social Responsibility, an Innovation Boot Camp for leaders was developed. Each workshop consists of 25 students (volunteers), led by a facilitator trained in human-centered design principles, to provide solutions to design challenges presented by internal and external organizations, including non-profits.

Social Outcome: UHG volunteers helped in enhancing trauma care for children across the region by lending their support to the creation of a Level 1 Pediatric Trauma Center at Children’s Hospitals Minneapolis campus.

An informative video about the project is available on YouTube at https://www.youtube.com/watch?v=mjgEbkbXGfM

Impact on leadership skills:
Significant increase in problem solving, team working and communication skills within volunteers.

Impact on business skills:
Increase in innovation and creative skills, better problem solving and decision making abilities, better understanding of expanding business model.

Other benefits observed over a period:
Positive impact on company brand/PR, recruiting talent, reduced cost of other training opportunities, and employee engagement.

Having a strong cultural orientation engages employees at all levels in volunteering. 81% of employees volunteer, with 44% of all hours tracked being in skills-based projects; in addition, nearly 50% of our executives use their business knowledge to help nonprofits through board service.

— Kate Rubin, Vice President, UHG Office of Social Responsibility
Mini case
Symantec Service Corps

Overview: In February 2014, Symantec sent 10 employees to Arequipa, Peru for a 4-week pro-bono volunteer assignment. Employees worked in teams on marketing, accounting, and HR-based projects for 3 non-profits in the country. For example, the marketing project consisted of a market study on the non-profit's competitors and clients and a marketing plan for their programs, including recommendations on how the plan can be executed.

Social Outcome: By improving supply chain practices of the local agricultural industry and providing better support for women and girls who suffered from domestic violence and abuse, Symantec helped to increase family income for the community.

An interesting video on the project is available on YouTube at http://bit.ly/1uaOmkV

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<tr>
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<th>No. of people participated</th>
<th>Time Commitment</th>
</tr>
</thead>
<tbody>
<tr>
<td>10K employees</td>
<td>Technology</td>
<td>Symantec Team Arequipa</td>
<td>10</td>
<td>4 weeks</td>
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Impact on leadership skills:
Significant increase in confidence, self-motivation and presentation skills within volunteers.

Impact on business skills:
Out of the box thinking, cross culture awareness, delivering more in a short duration through effective team collaboration, conflict management, and experimentation with various leadership skills.

Other benefits observed over a period:
Positive impact on company brand/PR, and recruiting talent.

It’s hard to put into words how amazing the program is. The reaction of all of our employees to the blog posts (authored by 10 PB & SBV participants) has been tremendous. They are some of the most popular posts we’ve had throughout the company.

Ashley Savageau, Community Relations Program Manager
Symantec
Career Exploration
PB & SBV projects can be identified to specifically support the internal mobility of an employee by providing the opportunity to gain experience in utilizing certain skillsets in preparation for the changing role.

New Business Avenues
Many senior executives from top companies serve on non-profit boards, providing employees an opportunity to expand and build their networks. PB & SBV also enhances the brand and reputation of companies and helps attract more business.

Safe Learning
Compressed timeframes, defined expectations and hands-on application of skillsets reduces fear of failure and allows volunteers to be more creative and innovative.

Employee Engagement
Learning through direct human interaction creates sense of satisfaction while the practical application of skills motivates employees to stay longer in the organization.

Internal Culture
When volunteers from various parts of the organization come together with a common objective, it helps strengthen the culture of the organization and helps expand an employee’s internal network and knowledge of the organization. It also builds collaboration and team building skills.

Other PB & SBV Benefits

Mini cases
Other benefits observed by survey respondents

New business avenues in action:
We were contacted by one of the prominent non-profits 8 years ago. They introduced us to A Billion + Change who then introduced us to various other profit clients.

—
Director
Small Marketing and Communications Firm
U.S.
PB & SBV models

Different models that are being used for successful implementation
Blended learning
Combining education, exposure and experience

In this type of model, employees continue to work their day job and take up additional responsibilities of serving the community using their core skillsets. They work with non-profits for a few months by dedicating 100+ hours in a span of 5 months. During this period, they attend classroom trainings and receive individual and team coaching from leaders to maximize their learning experience.

- CSR team identifies potential non-profits based on well defined evaluation criteria and existing partnerships
- Learning and development team identifies appropriate projects with non-profit organizations
- Top performers at mid management level are encouraged to apply to maximize their learning experience while working in teams
- Selection committee screens and accepts candidates based on geography, gender and area of expertise
- Selection committee consists of leaders from various business units and functions within the organization
- Selected candidates attend classroom trainings and networking sessions before working for non-profit
- This helps to frame the project and provide relevant background knowledge, tools, tips and guidelines
- Different teams are formed to work with non-profits (Experience)
- Simultaneously, employees take a selection of recommended e-learning/digital online courses (Education)
- Leaders coach the teams and individual participants during entire process (Exposure)

We believe in a blended learning approach—combining the power of classroom training and coaching from senior leadership with skills based volunteerism.

—Jeanie Cole, Associate Director, Global Human Resources, Deloitte
Dial “728” — SBV on your keypad

Short term, full time PB & SBV assignment

In this type of model, employees offload their regular duties to temporary backup resources and serve the community for a few weeks to one month (maximum). During this time, they either apply their existing skills or build new skills in the process.

- CSR team identifies potential non-profits based on organization’s specific evaluation criteria
- Top performers are encouraged to apply for skills-based volunteerism
- Selection committee consisting of senior leaders finalizes the list of participants
- Selected volunteers work in teams with non-profits on various projects by dedicating several weeks up to a month on skills based service
- Resource backup is planned and provided to support day-to-day job on behalf of these candidates for up to one month
- Volunteers resume their normal day job upon completing their assignment

Our skills based volunteerism program is part of L&D and we call it as “Leaders in Service”.

— Manager, Small Healthcare Company, U.S.
Prioritizing service
Serving the community while dialing down from work

In this model, employee(s) take a certain percentage of pay cuts for few months while dialing down from their regular duties. During this time, they serve the community while working on a project where they are either applying their existing skills or building new ones.

• CSR team identifies project with non-profit organization(s)
• Employees volunteer to do PB & SBV based on their interest
• Volunteers work with non-profit for about 3 months taking up to 20% salary cut for that duration
• Employees resume their normal job upon completing the project for the non-profit

While negotiating commercial lease for Latinos and Hispanic, I built a knowledge base in a new area of the law. The experience allowed me to work closely with a colleague and now I can tackle contract negotiations for a commercial lease.

Participant, Large Technology Company, U.S.

Slalom consultants take 80% of their pay for three months in order to help the community. As part of their Philanthropy Fellow Program, seasoned consultants volunteer their expertise to benefit a local non-profit in a pro bono engagement.

— Slalom.com
Service at the core
Giving back is a part of the company’s DNA

In this model, employees at all levels are encouraged to serve the community through boot camp programs aimed at building certain skills within employees (example — Innovation). These programs run from a few days up to a few weeks depending on the career level of the employee and the nature of the targeted skill development (some skills require more time to acquire and nurture). Such programs also help in changing the culture within an organization and help align PB & SBV with L&D programs to the organization’s core competencies.

• CSR team identifies project with non-profit organization(s)

• Employees at all levels are encouraged to participate in PB & SBV

• Volunteers work with non-profits on various projects while performing their day-to-day jobs
  • Opportunities are identified through the PB & SBV projects to develop skills not necessarily attained through day job

• PB & SBV is part of organization’s core values

• PB & SBV becomes part of leadership DNA

Our “Succeed Through Service” program gives our employees around the world the opportunity to participate in the program (during work hours) throughout the school year, sharing their skills, knowledge and experience with at-risk students.

— Sue Stephenson, Vice President Community Footprints, The Ritz-Carlton Hotel Company, LLC

With our Emerging Enterprise program, we are looking at developing a “global mindset,” developing leaders who can take charge without much direction, work in ambiguity, and make a sustainable impact.

- Sarah Middleton, Executive Director, PIMCO Foundation
### Considerations for implementing PB & SBV models

Companies should choose what works for them and tailor it.

<table>
<thead>
<tr>
<th>Model</th>
<th>Considerations</th>
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| **Blended Learning** | • Helpful in enhancing skills at all employee levels within an organization and do not need to be restricted to only top performers  
• Easier to implement at senior levels since most organizations are bottom heavy  
• As professionals’ roles and responsibilities expand, PB & SBV projects provide a platform to further develop their skills and showcase readiness for the next level  
• Classroom training (education) and leadership coaching (exposure) are combined with PB & SBV projects (experience) for complete professional development |
| **Dial “728”**       | • Addresses more immediate community needs where the solution(s) can be delivered within a few weeks  
• High performing individuals (at various levels) are chosen to ensure faster and better results in a short span of time  
• When impactful learning is targeted and required within the short time |
| **Prioritizing Service** | • Effective when employees are looking for more meaningful work in their career and money is not the main driving factor  
• Useful when utilization and productivity of employees (irrespective of level) is of prime importance, especially when they are not fully staffed or billable. Example — it can be incorporated with onboarding at the time of joining or during organizational change |
| **Service at the core** | • Great for identifying development opportunities for employees at all levels  
• Ideal for inculcating cultural change and values within the organization or to develop a certain mindset within employees  
• Appropriate for an organization whose products and services are closely tied to the community (social enterprises)  
• Identify a need to build specific skillsets (at a particular employee level) |
Conclusions

How to incorporate PB & SBV into employee learning & development
Effective Leadership Development
Applying a proven L&D framework into PB & SBV

The 70-20-10 framework* is all about enabling employees and organizations to adapt and learn at the speed of the changing business landscape. Incorporating L&D framework into PB & SBV could help solve certain strategic challenges such as — organizational growth, productivity and transformation through innovation.

* Source: Center for Creative Leadership (CCL)

**70%** + **20%** + **10%** = **100%

**Match skills to project**
Encourage PB & SBV based on employee’s interest/strength

**Tap into potential**
Use PB & SBV to uncover hidden skills within employees use it as a mechanism to test their potential on stretched assignments

**Provide tailored coaching and mentoring**
Use coaching and mentoring from senior leaders for support, encouragement, examining future career direction, possible moves and shifts

**Structured approach**
Identify and choose trainings that are of interest to employees to maximize their learning

**Complete professional development**
Identify trends, models and processes which drive highest levels of impact in employee learning

PB & SBV has had a dramatic impact on the culture of our organization. It is an active, living demonstration of servant leadership as opposed to "textbook" leadership development programs that espouse community involvement in a very general sense.

— Manager, Small Marketing and Communications Firm, U.S.
Cost benefit analysis

The value of learning and development to any organization is not a simple profit versus cost or ROI valuation.

- Apply and practice new skills in a safe environment before applying them on for-profit projects.
- Business ROI: Helps to attract new talent, retain top performers, and engage employees by building professional and personal satisfaction.
- Social ROI: Impacts company’s reputation and brand in a positive way.

- Opportunity cost of an individual being absent from day job during work hours.
- Learning and development through other less expensive traditional leadership programs (digital learning).
- Employee engagement through existing traditional leadership development programs.
- Enhancing brand value through existing marketing initiatives.

Companies are investing in first and midlevel leaders, with spending averaging roughly $1,700 to $2,700 per participant, respectively.

— Bersin by Deloitte

Our SBV programs require more internal resources to deliver effectively but the ROI is exponentially higher in PB & SBV than other traditional leadership programs.

— Bob Tweedie, Program Manager, Global Learning and Development, Deloitte
### Our findings

#### Comparing PB & SBV with other L&D programs

<table>
<thead>
<tr>
<th>Effectiveness criteria</th>
<th>PB &amp; SBV</th>
<th>Leadership Mentoring</th>
<th>Traditional Learning (Classroom/e-Learning)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal “structured” learning</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Safe Learning Environment</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Learning with/from peers</td>
<td>✓</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>Short time frame</td>
<td>✓</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>Hands-on learning</td>
<td>✓</td>
<td>✓</td>
<td>✗</td>
</tr>
<tr>
<td>Skill building and networking opportunities</td>
<td>✓</td>
<td>✓</td>
<td>✗</td>
</tr>
<tr>
<td>Greater business ROI</td>
<td>✓</td>
<td>✓</td>
<td>✗</td>
</tr>
<tr>
<td>Employee engagement and job satisfaction</td>
<td>✓</td>
<td>✓</td>
<td>✗</td>
</tr>
</tbody>
</table>

If a program is more structured, it’s easier to follow. It can have a bigger impact because you can measure it.

— Senior Communications Manager, Global Professional Services Firm, U.S.
PB & SBV’s role in the overall HR lifecycle

Tips for success

Apply broad skills and cover wide areas within short time

Without the pressure of revenue generation, innovation thrives

Put your best people together for maximizing learning (selection process)

Involves senior leaders within your organization to mentor volunteers

Provide opportunities to your employees to explore new skills

Include it in existing relevant learning and development curriculums

Publicize the program and recognize volunteers and their impact

Skills Based Volunteerism

Skills Development (Leadership skills)

Retention

Job Satisfaction

Attracting Talent/Recruitment

Use it as a mechanism for career transition opportunities
Next steps for A Billion + Change

How to pledge more support and increase outreach in undeserved communities
Reaching the 2015 Vision of 5000 pledge companies
Promoting PB & SBV as a leadership development tool

**More Marketing**
- Publicize the benefits of PB & SBV through this report on your web site, other non-profit partner’s web sites, LinkedIn, Yammer and other similar social platforms
- Tailor the content based on the type of audience. Example — Senior Executives like quick facts and figures while managers may appreciate a more detailed report to understand the nuances of the research. Volunteers may like to see the details around current success stories
- Distribute the tailored content (along with web site link referencing the full detailed report) to all types of companies and encourage them to share further with their employees and clients
- Involve well known industry experts and political figures as your brand ambassadors for more pledges

**Effective use of Technology**
- Arrange webinars, webcasts, Podcasts and RSS feeds to raise awareness
- Encourage partners to utilize A B+C Facebook/Twitter/YouTube for sharing pictures and videos from successful PB & SBV events
- Build a stronger community of practice leveraging existing social media (Twitter, Yammer, Instagram, and Google Plus) while working with organizations, volunteers, and other non-profit partners for better information sharing and to avoid reinventing the wheel when working on similar projects
- Create dedicated email alias where people can contact your organization especially for PB & SBV
- Endorse the skills of your volunteers on LinkedIn and provide recommendations for them

**Explore and utilize other channels**
- Expand your network and include educational institutions (universities within the U.S.) and provide opportunities for business school students (undergraduate and graduate level) to work on challenging PB & SBV assignments
- Reach out to well-known universities outside the U.S. to work on projects of an international nature
- Leverage technology companies outside the U.S. (considering focus area and cost factors)
- Upon successful completion of the program, reward students (volunteers) with a branded certificate and letter of recommendation from your organization that could help them in finding the right job
References

- Center for Creative Leadership (CCL) publishing
- Deloitte survey results and case studies
- Taproot Foundation publishing
- Bersin by Deloitte
- Wikipedia
Appendix

Additional information
Measuring impact

Steps for assessing employee skill development
Measurement tools

Majority of the companies use discussion with PB & SBV participants

Other forms of follow up: Companies are also encouraging group retrospective meetings/post-campaign debriefs with the project team, volunteers are also being asked to write project summaries about their PB/SBV experience, which can be promoted internally in the organization.

We are on a journey with skills based volunteerism and hope to tie it into more formal leadership training as we go

— Director, Corporate Citizenship, Software and Services Provider, U.S.
### Mini case Template

<table>
<thead>
<tr>
<th>Company Size</th>
<th>Company Type</th>
<th>Program Name</th>
<th>No. of people participated</th>
<th>Time Commitment</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 10K employees</td>
<td>&lt;Company Type&gt;</td>
<td>&lt;Program Name&gt;</td>
<td>&lt;XX&gt;</td>
<td>&lt;XX&gt;</td>
</tr>
</tbody>
</table>

**Overview:**

Social Outcome:

Impact on leadership skills:

Impact on business skills:

Other benefits observed over a period:

"Quote from Volunteer" OR "Quote from Leader"
Survey Statistics

Various traditional leadership development programs

- **92%** Large and small size companies are using “on the job learning” as a mechanism for leadership development.

- **69%** Large and small size companies are using “Digital learning” as a mechanism for leadership development.

- **23%** Large and small size companies are creating learning modules and programs in partnership with business schools for leadership development.

- **7%** Large and small size companies are using other mechanisms such as seminars and conferences as a mechanism for leadership development.

- **84%** Large and small size companies are using “classroom” based trainings as a mechanism for leadership development.

**Both large and small size companies are utilizing various traditional learning programs in combination* for skills development of employees**

*Since companies are using various programs in combination, percentages do not add up to 100

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As the global leadership development manager, we have partnered with the skills-based program, integrating SBV into our formal leadership development programs. The results benefit our leaders, our communities, and our businesses.

— Program Leader, Large Science and Technology Company, U.S.
Mini case
Blackbaud

Overview: Blackbaud provides a two-day camp for fifth graders from low income schools. Main objective is to provide more and better exposure these children about potential careers in technology, demystifying what it means to be a programmer or to have other roles in a tech company. The focus is on showing kids why they need to go to college.

20 iPads are given to students (20 or more students) to build simple applications. Blackbaud volunteers teach them about the entire product development process (from design to programming to documentation and testing).

Impact on leadership skills:
Significant boost in confidence, communication and influencing skills within volunteers.

Impact on business skills:
The ability to share professional skills and experience representing the company.

Other benefits observed over a period:
Impact on company brand/PR, recruiting talent and employee engagement.

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84% of our employees came to work with us because we work with nonprofits. Blackbaud’s commitment to giving back is one of the top 3 things that our employees care about

— Rachel Hutchisson
Director
Corporate Citizenship,
Blackbaud, Inc.
Mini case

CEB

Overview: One of Ashoka’s greatest assets is their global network of social entrepreneurs, whom they call Fellows. To identify Fellows, Ashoka goes through a robust process of selecting leading social entrepreneurs. However, after Fellows were elected, Ashoka struggled to manage and activate this network to achieve greater social impact.

Social outcome: Identified new model for Fellow engagement and created a playbook and an online tool to help different offices identify the right activities as well as metrics to track the impact of those activities. The deliverables and outcome from the project benefited Ashoka in achieving greater social impact.

Impact on leadership skills: Significant boost in confidence, presentation and problem solving skills within volunteers.

Impact on business skills: Project management, conducting interviews, profiling best practices, designing graphics, providing consultative feedback, delivering a change management strategy, leading teams, and communicating and collaborating in a team of cross-company professionals.

Other benefits observed over a period: Impact on company brand/PR, recruiting talent, reduced cost of other trainings.

PB & SBV is an effective tool for professional development as it allows you to experiment with skills that you may not be able to practice in your current role without fear of pressure from your direct manager.

— Jessica Marks
Associate Director
CEB