Supported by:

Recruitment, Training, and Impact Measurement; a Recommended Approach for Impact Sourcing

Carol De Abreu, Carolina Vilca, Alexander Bourdeau

Contents

Definitions

- **AO:** Application Outsourcing. Technical outsourcing that may include the management, development, testing or upgrade of packaged or customized software (e.g., a financial, human resources, sales, customer relationship management or mobile application) by a third party.
- **BPO:** Business Process Outsourcing. Contracting out of specific business processes or operations to a third party -- e.g., wage processing. BPO does not offer technical support; it only takes responsibility for a business function, or functions.
- **Client:** Organizations that purchase outsourcing services and are potential candidates for buying Impact Sourcing.
- **Competency:** A required skill or knowledge for an individual to perform a specific job.
- **Corporate Social Responsibility (CSR):** Corporations encouraging positive impact on environment, employees, and society through its business operations
- **Disadvantaged individuals:** People who are at a unique disadvantage and lack access to traditional employment. This can include those living in rural areas of developing countries or in slums, those without access to secondary or tertiary education, or educated individuals in areas of high unemployment.
- **Employees:** Local disadvantaged populations that are employed to undertake outsourcing activities.
- **Employee Value Proposition:** The rewards and benefits that are received by employees in return for their performance in an organization.
- **Impact Sourcing:** Outsourcing that benefits disadvantaged individuals in low employment areas. It looks beyond the common source of supply for traditional outsourcing to provide higher-income employment and access to new income opportunities to individuals that might not otherwise be employed in this sector.
- **Impact Measurement:** Assessing the long term social and economic development impacts of operations and/or philanthropy
- **IO:** Infrastructure Outsourcing. Technical outsourcing of the management, development and/or upgrade of information technology infrastructure for running technical services (e.g., email) to a third party.
- **ISSP:** Impact Sourcing Service Provider. An organization set up with the explicit intent to undertake outsourcing work that is classified as Impact Sourcing.
- **Outsourcing:** References all forms of outsourcing, including Application Outsourcing, Infrastructure Outsourcing, and Business Process Outsourcing.
- **Outsourcing center:** A physical facility or center where outsourcing tasks are completed. Such a center may be owned by the ISSP or a Traditional Outsourcer.
- **Replicable:** A business model that can become a blueprint for other organizations/entities that are interested in setting up similar operations.
- **Scalable:** An operation that has the characteristics and the capabilities to grow beyond 250 full time employees.
- **Shared Value:** Concept that business decisions and social policies must benefit each other because of the mutual dependence of corporations and society.
- **Sourcing:** The identification of job candidates through recruiting techniques.
- **Sustainable:** An organization that can continue to operate independently without "donor" support. This organization can be for-profit or not-for-profit. The organization could receive government support as long as that support is available to all organizations within that community (e.g., a tax break for conducting business in the community).

- **Traditional Outsourcer:** A provider of traditional outsourcing services, such as Accenture. The organization may undertake a percentage of outsourcing work that is classified as Impact Sourcing.
- **Training centers/schools/universities:** Organizations that feed the talent supply for the outsourcing center. These tend to be local organizations.

Introduction

The Rockefeller Foundation's Digital Jobs Africa initiative seeks to impact the lives of 1 million people in six countries in Africa by catalyzing sustainable Information and Communications Technology (ICT)-enabled employment opportunities for African youth who would not otherwise have an opportunity for sustainable employment. A key element of this initiative is the development of the Impact Sourcing industry which employs high potential but disadvantaged people in outsourcing jobs. The Foundation supported Accenture Development Partnerships to develop a recruitment, training, and impact measurement approach that can be leveraged by any organization interested in, or currently engaged in, Impact Sourcing in order to support the future growth of this industry.

Impact Sourcing (IS) is the socially responsible arm of the business process and information technology outsourcing industry that employs individuals, especially high potential, disadvantaged youth, women and marginalized people, who would otherwise not have an opportunity for sustainable employment. Impact Sourcing has the potential to transform the lives of young people in Africa by increasing income between 40% and 200%, while also creating formal, stable employment that can often increase family investment in health care and education. Impact Sourcing also provides the opportunity for young people to learn a set of in-demand, transferable skills that enable them to compete for the jobs of the future.

The Rockefeller Foundation has been working on the issue of youth employment in the rapidly growing information and communications technology (ICT) enabled sectors for the last several years, and has engaged with many business leaders around a promising solution, called Impact Sourcing.

This nascent industry is growing and, according to a recent report by Avasant[1], is expected to reach US$55.4 billion by 2020. Evidence of this growth can be seen on multiple fronts:

- From Impact Sourcing Service Providers (ISSPs):
    - Digital Divide Data, an ISSP with locations in Kenya, Cambodia, and Laos, reported a 47% increase in earned income in FY2012 and has nearly doubled their employee base in two years.[2]
    - Samasource, an ISSP that provides enterprise digital services through a micro-work model in places like Uganda and Haiti, reported a 400% increase in sales bookings in FY2012.[3]
- From traditional outsourcing service providers:
    - Accenture, a leading consulting, technology, and outsourcing organization, has supported the creation of two rural IT and BPO delivery centers (Cayuse Technologies and Indigena) located on Native American reservations where there is traditionally very high rates of unemployment, poverty, and alcoholism.
    - Wipro and Infosys, two pioneers in outsourcing, have both started rural outsourcing centers: Wipro in Tamil Nadu, India, and Infosys (through several partners) in Karnataka and Andhra Pradesh.
    - Genpact, a leading BPO provider, has outsourced its in-house finance and accounting work to RuralShores, a rural outsourcer based in India.

[1] "Incentives & Opportunities for Scaling the 'Impact Sourcing' Sector", Avasant, September 2012, pg. 12
[2] Digital Divide Data Annual Report, 2012
[3] Samasource press release, January 2013, http://samasource.org/company/press/samasource-reports-record-year-over-400-increase-in-sales-bookings/

However, to achieve long-term growth, and ultimately realize greater social impact, the Impact Sourcing industry will need to scale. As identified in Avasant's report, enhancing the "supply" of workers is one of the key enablers for scaling. This means that more workers will need to be recruited, hired, and trained – in an efficient, cost effective manner. ISSPs will therefore need to enhance their talent management systems and processes to handle an increasing employee population and rapid growth. And Traditional Outsourcers, who will seek to do more in this space through social responsibility and/or business reasons, may need to modify their operations to reflect the unique features of this industry - most notably that it intentionally employs the poor and vulnerable, which can add additional risks and costs.

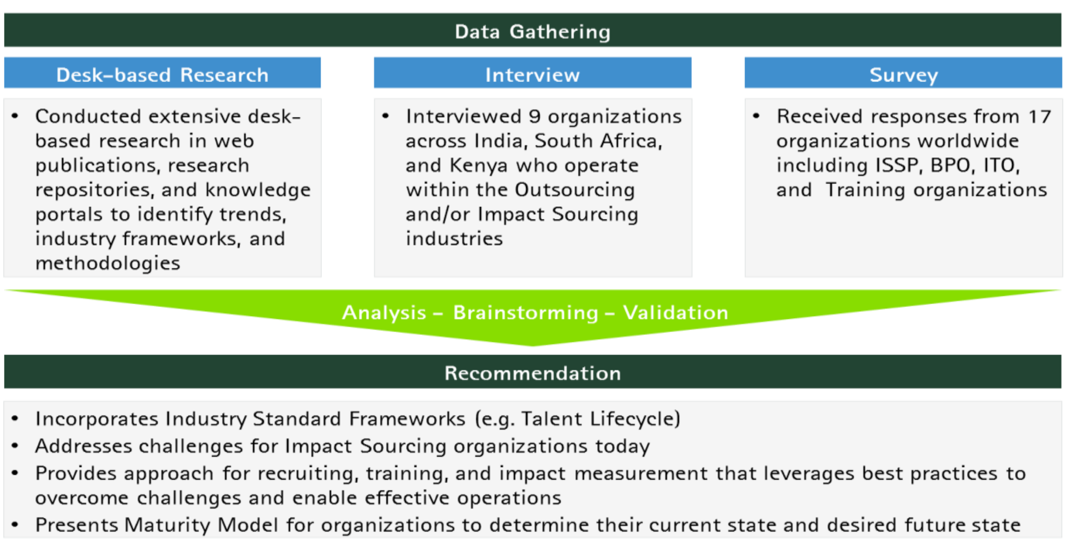
And finally, as organizations – and shareholders – begin to embrace the concept of Shared Value[4], it will be increasingly important to demonstrate the value of Impact Sourcing. By measuring and communicating the value of the social outcomes achieved through this new industry, it will demonstrate the importance of the work – beyond simply cost savings, and into the individual and community benefits – and help drive future growth and ultimately impact the lives of millions of individuals.

Therefore, the objective of this paper is to build upon two of the recommendations from Accenture's previous research[5] – namely: to further scale the industry, and increase Impact Sourcing within traditional outsourcing providers by providing a **recruitment**, **training**, and **impact measurement approach** that can be leveraged by any organization interested in, or currently engaged in, Impact Sourcing in order to support the future growth of this sector. The approaches and recommendations are based on successful practices observed from current Impact Sourcing Service Providers, as well as industry leading practices that are used by Traditional Outsourcers in managing their large-scale, global operations.

Approach

Accenture Development Partnerships leveraged the following structured approach to identify current recruitment, training and impact measurement approaches from existing ISSPs and Traditional Outsourcers, as well as develop recommendations for these organizations in order to facilitate long-term growth.

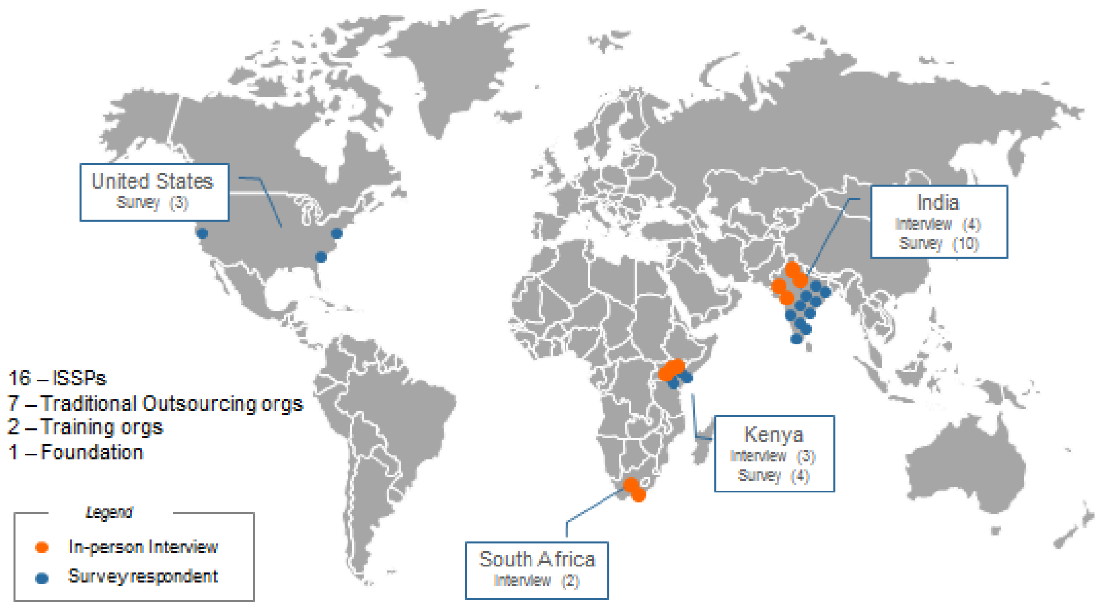
Figure 1. Approach



[4] Creating Shared Value, Harvard Business Review, January 2011
[5] *Exploring the Value Proposition of Impact Sourcing*, Accenture, 2012

The inputs to developing the Recruitment, Training and Impact Measurement approach came from three primary sources: desk-based research, interviews, and surveys. Throughout the extensive data gathering phase, the objective was to identify and understand existing models, analyze their effectiveness and examine industry trends to identify the optimum approaches for recruitment, training and impact measurement. The team conducted interviews with 9 organizations in India, South Africa and Kenya, and surveyed an additional 17 organizations that currently operate in Outsourcing and Impact Sourcing industries. The team interviewed organizations based on size, global reach, maturity, and reputation in Impact Sourcing industry; and most of these organizations were also involved in the 'Impact Sourcing Feasibility Study" conducted by Accenture in 2012. Organizations selected to be surveyed were identified through research and recommended by the Rockefeller Foundation. See the Appendix for survey and interview data.

Figure 2. Interview and Survey Demographics



Framework

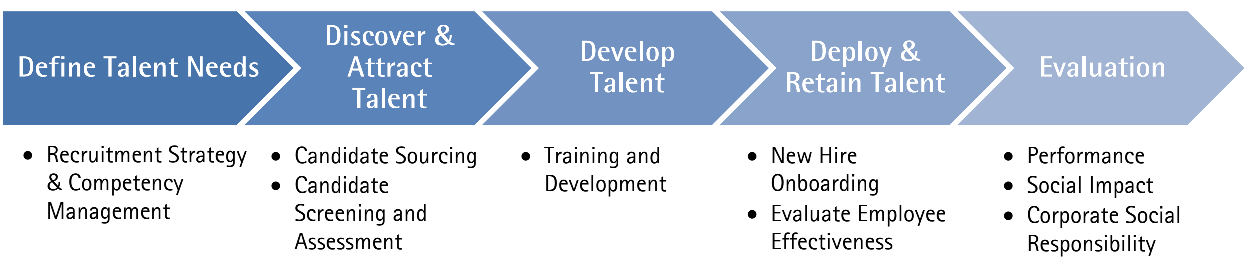
As part of this study, several frameworks were used to help define the scope of the functional areas that were examined, provide a mechanism for evaluating current capabilities, and to assist in providing recommendations for enhancement. There are two key frameworks that serve as the foundation to understand how the Impact Sourcing recommendations should be implemented for recruitment, training and impact measurement:

1. Talent Life Cycle
2. Maturity Model

Talent Life Cycle

The Talent Life Cycle is an industry standard framework recommended to Human Resources (HR) professionals to outline core processes, and address talent issues. The Talent Life Cycle, seen below, is divided into key talent practice areas, which describe the activities needed to define, discover and hire employees (i.e., Recruit), and develop employees (i.e., Train) for Impact Sourcing work, and to evaluate employee performance and the social impact on the individual and community (i.e., Impact Measurement).

Figure 3. Talent Life Cycle

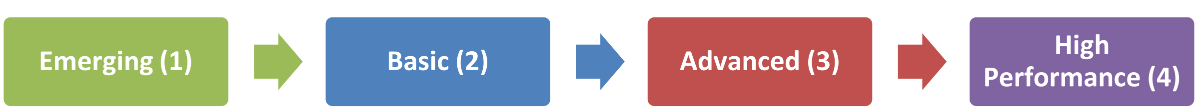


Maturity Model

What is a Maturity Model?

A maturity model is a tool that helps to assess an organization's degree of maturity of its methods and processes according to leading practices. The model allows an Impact Sourcing organization to see where they are today and where they want to be in the future, depending on their strategic imperatives and expected growth. For this study, the analysis of different organizations through interviews and surveys resulted in creating four levels of maturity: Emerging, Basic, Advanced and High Performance. High levels of maturity are associated with High Performance, such as documented business processes and advanced use of technology for timely results. Capabilities at lower levels of the maturity model form the foundation or are the prerequisites for capabilities at higher maturity levels.

Figure 4. Maturity Model Levels



The Value of a Maturity Model

The maturity model contains a list of activities organized by progress levels for recruitment, training and impact measurement. An organization should conduct a review of their processes, people and technology based on the respective key factors for recruitment, training, and impact measurement to determine where they are situated within the maturity model. The value for an ISSP to conduct this internal review of their processes allows it to compare their current practices to leading practices, and identify areas for improvement. The maturity model also provides an opportunity for the Impact Sourcing industry to develop benchmark data of their internal capabilities to allow existing organizations and new entrants to compare their capabilities with other organizations as the industry grows.

Figure 5. Sample Maturity Models

Success Factor	Self-Assessment Questions	Emerging (1)	Basic (2)	Advanced (3)	High Performance (4)
Clearly defined drivers	• Does your organization have clearly defined strategic drivers?	• Mission, purpose, goals, objectives are not defined	• Mission, purpose, goals, objectives are defined without framework or tool assistance	• Use of LogFrame or similar tool for defining mission, purpose, goals, objectives • Ad-hoc review of alignment between mission, objectives, and indicators	• Use of LogFrame or similar tool for defining mission, purpose, goals, objectives • Consistent review of alignment between mission, objectives, and indicators

Process	Self-Assessment Questions	Emerging (1)	Basic (2)	Advanced (3)	High Performance (4)
Define competencies and requirements needed	• Do your recruiters know the required skills and experience to look for in candidates for each role? • Have you documented the competencies required for each role?	• Competencies and requirements are not defined • Recruiters have inconsistent knowledge of skills and experience they require to hire • Job descriptions are primarily made based	• Competencies and requirements defined for entry level jobs • Recruiters are aware of the skills and experience they require to hire but there is ad hoc usage of competencies • Some competencies	• Competencies and requirements defined for all open jobs • Recruiters are aware of the skills and experience they require to hire and there is consistent usage of competencies	• Competencies and requirements defined for all jobs and continuously updated based on market needs • Each job description has documented competencies and skills for each job

Process	Self-Assessment Questions	Emerging (1)	Basic (2)	Advanced (3)	High Performance (4)
Establish Learning Governance	• Do you have an established learning governance process? • Do you have an established learning committee? • Is there a Learning request & approval process.	• Limited, inconsistent learning governance model in place (people, process, evaluation metrics) • Limited alignment between learning function and	• Standard learning governance model in place • Strategic linkage between learning function and some business departments. • Learning committee is in place with	• Standard learning governance model in place - some data fed back for continuous improvement • Strong linkage of learning function to business objectives	• Standard learning governance model in place (people, process, evaluation metrics) – data fed back for continuous improvement • Strong linkage of learning function to

How to Use the Maturity Assessment

The assessment is designed to give organizations interested in, or currently engaged in Impact Sourcing a short, clear review of the status of their recruitment, training and impact measurement capabilities in terms of Impact Sourcing. The Recruitment, Training and Impact Measurement approaches are not a one size fits all solution. First, Impact Sourcing organizations should assess the current state of their functional capabilities in order to determine how the approach can be adapted to fit their needs. The maturity model provides Self-Assessment Questions that organizations can use to determine where they are today. This is the first phase of the assessment, also known as the Diagnose phase. See the Appendix for Self-Assessment Questions for recruitment, training and impact measurement.

Figure 6. Self-Assessment Questions

Process	Self-Assessment Questions	Emerging (1)	Basic (2)	Advanced (3)	High Performance (4)
Establish Learning Governance	• Do you have an established learning governance process? • Do you have an established learning committee? • Is there a Learning request & approval process.	• Limited, inconsistent learning governance model in place (people, process, evaluation metrics) • Limited alignment between learning function and	• Standard learning governance model in place • Strategic linkage between learning function and some business departments. • Learning committee is in place with	• Standard learning governance model in place - some data fed back for continuous improvement • Strong linkage of learning function to business objectives	• Standard learning governance model in place (people, process, evaluation metrics) – data fed back for continuous improvement • Strong linkage of learning function to

To conduct a maturity assessment, leading practice recommends that the Diagnose/Analysis phase should take 1 – 5 weeks. The next phase is to develop/define the future state and build the timeline and roadmap, which should take 7 – 10 weeks. Upon completing and receiving sign off on the roadmap to achieve the target future state, the organization will need to build a team to deploy the plan. The timeline to achieve the future state depends on the project plan. The figure below illustrates the key activities and outputs throughout the process. See the Appendix for detailed tasks to conduct a maturity assessment.

Figure 7. Maturity Assessment Approach

Diagnose	Develop	Deploy
Week 1 - 5	Week 5 to 15	Week 15 +
Activities: • Understand the organization's strategy and priorities • Assess current and target practice and capability o Strategy, Organization, Processes, Technology, and People • Qualitative research with managers and employees **Outputs:** • Diagnostic results • Gap analysis	**Activities:** • Define requirements and processes • Identify interventions and methodologies to address target state gaps • Define high level future model with stakeholders • Develop change journey roadmap to future state **Outputs:** • High level future state design • Roadmap to future state	**Activities:** • Identify team involved in changing organization to future state model • Communicate changes and plan for future state to key stakeholders • Implement roadmap to future state **Outputs:** • Dedicated team responsible to complete activities to reach future state • Communication plan

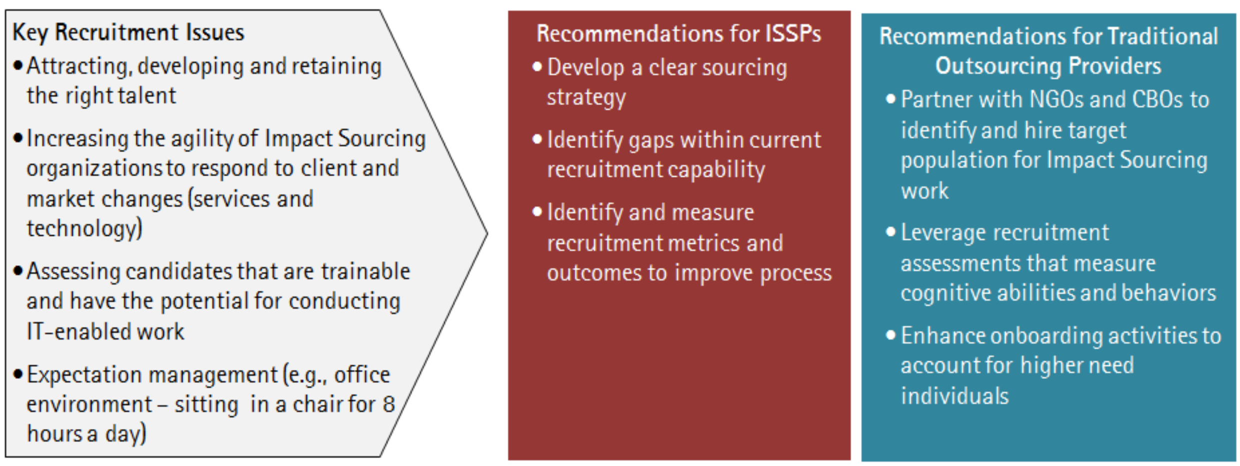
Recruitment

Recruitment is the set of activities aimed at finding, selecting and hiring candidates with the appropriate competencies to fill job positions in an organization in a timely and cost effective manner. For Impact Sourcing, recruitment is very important to target high potential but disadvantaged youth, yet it can be quite complex to balance business need for high-quality individuals at a certain cost/salary level versus the internal social mission of providing meaningful work for the poor, the underserved, and disadvantaged.

The Impact Sourcing Recruitment approach defined below can be replicated by organizations interested in, or currently engaged in, Impact Sourcing. Recruiters, or persons responsible for completing recruitment activities, should leverage the recruitment process steps as recommended in this document, as well as adhere to all local laws and customs pertaining to recruitment.

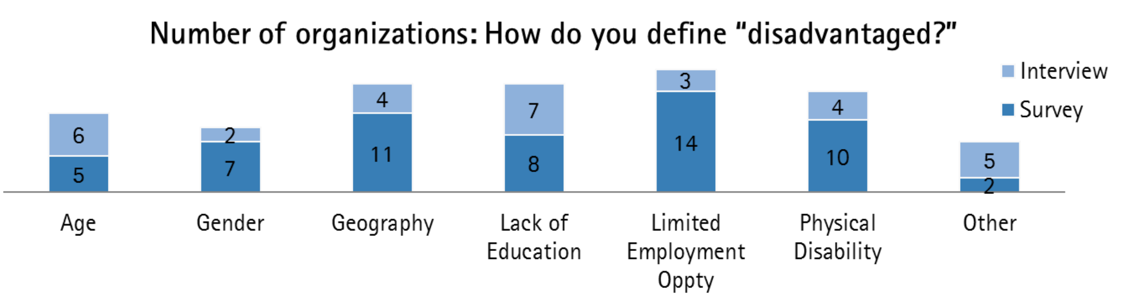
The Recruitment approach addresses the following issues that were reported by Impact Sourcing organizations through interviews and surveys:

Figure 8. Recruitment Issues and Recommendations



Findings

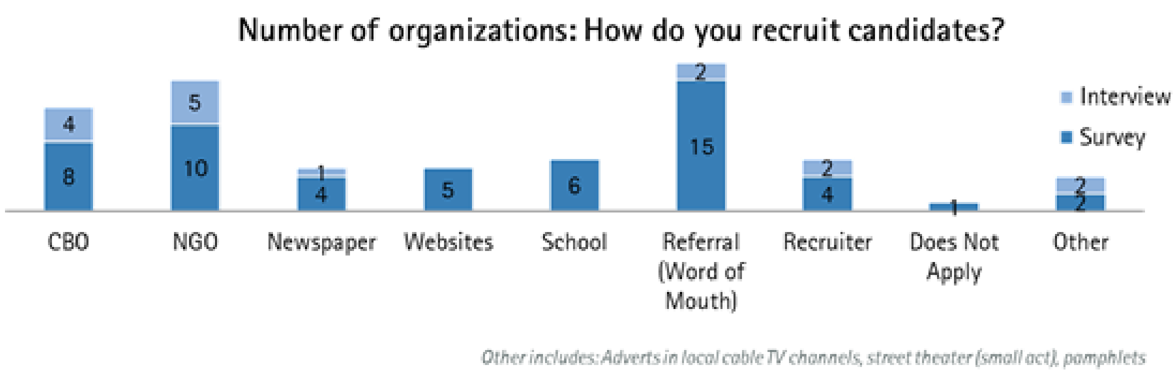
Based on our interviews and survey results, finding the right talent is the biggest challenge for organizations engaging in Impact Sourcing. Most organizations have a pool of individuals to pick from; however, to qualify as Impact Sourcing, they need to find candidates who are experiencing socio-economic hardship with limited opportunity for sustainable employment but who are trainable with potential to be high performers.



Other includes: Qualify for government education loans, Inadequate connectivity and power, financial hardship, single parent home

Another challenge with talent is finding individuals with the right language skills, preferably English, among the disadvantaged that Impact Sourcing organizations want to employ.

Interview and survey participants also indicated that referrals through word of mouth from current employees and alumni were the most popular method of finding talent for Impact Sourcing organizations. The next most popular source for talent was collaboration with NGOs and CBOs. An interesting finding was how one Impact Sourcing organization leveraged small theater performances during town fairs to describe the job opportunities their organization can provide in order to attract talent. Another organization placed adverts in a local television station.



There is also a gap in expectation management for new employees entering the industry or professional environment. Some individuals have a pre-conceived notion that working for an outsourcer means to work in a call center only, when there are other work opportunities in BPO and ITO including digitization and financial services. In addition, sometimes these employees need to adjust to an office environment, for example sitting in a chair for 8-hours a day.

Key Recommendations for ISSPs

A set of recommendations were developed based on survey findings to improve recruitment practices for Impact Sourcing. There are a different set of recommendations for ISSPs because they already recruit disadvantaged individuals; whereas traditional outsourcing providers have to alter their established recruitment practices that focus on individuals with higher education and experience to disadvantaged individuals with limited education.

Recommendation for ISSPs	Why This is Important
Develop a clear sourcing strategy. A sourcing strategy defines what socio-economic criteria, competencies and skills sets are required to employ disadvantaged individuals who are trainable, yet have the potential to be solid performers. The sourcing strategy also defines where and how to find the best talent (e.g., referrals, social media, etc.) This also requires Impact Sourcing Recruiters to have a "hunter" mentality to search for talent from traditional methods (e.g., print advertisement) to collaborating with NGOs and CBOs.	• Establishes a common understanding across the organization of what types of individuals they are looking for and where to focus their resources to find these individuals. • Provides opportunity to identify additional low cost sourcing channels (referrals, social media) to expand search for target candidates. • Establishes a baseline of skills, competencies and behavioral factors that the organization is searching for to identify suitable candidates. ○ Successful identification of competencies is critical at the recruitment stage as these are used throughout the Talent Life Cycle (e.g., training, performance management).
Identify gaps/areas for improvement within current recruitment capability. For example, are Impact Sourcing organizations able to accurately predict if a recruit will be successful in their role? Are an organization's recruiting efforts cost effective? Are there new tools that can help streamline the recruitment process? The Recruitment approach in this study was developed based on leading practices from current ISSPs and Traditional Outsourcers, and can be used as a starting point by current Impact Sourcing providers and Traditional Outsourcers seeking to enter this market.	• Allows an organization to compare their recruitment activities against leading practices. • Identifies activities that could be streamlined to be more efficient and cost effective.
Capture basic recruitment metrics. The next key recommendation is for Impact Sourcing organizations to measure their recruitment activity in order to improve their processes. Metrics should include the number of open positions, the time to fill a job, and the percentage of offers accepted by candidates. Measuring recruitment outcomes also measures aspects of the candidate and client satisfaction with the recruitment process or new hire performance.	• Enables an organization to measure the effectiveness of their processes and identifies the potential for improvement and cost reduction. • Measures the quality of the candidates and determines if sourcing channels and/or assessments are effective.

Key Recommendations for Traditional Outsourcing Providers

Recommendation for Traditional Outsourcing Providers	Why This Is Important
Partner with NGOs and CBOs. Partnering with NGOs, CBOS and schools can be valuable channels to find individuals that meet Impact Sourcing criteria – demographic (e.g., youth, women, disabled), financial hardship, or location (e.g., rural, slums). These organizations already work with the targeted population ideal for Impact Sourcing and they provide credibility to support the Traditional Outsourcer's engagement in Impact Sourcing. The level of collaboration of Traditional Outsourcers with third-party organizations, like an NGO, can vary from allowing the NGO to be responsible for finding and training the talent or sharing the responsibilities where the NGO finds the talent and the Traditional Outsourcer trains the selected employees for outsourcing work.	• Establishes a new sourcing channel with organizations with deep experience in working with the poor and vulnerable. • Provides direct access to existing groups of target candidates which minimize the Time to Fill metric. • Provides opportunity to increase CSR (Corporate Social Responsibility) footprint. • Establishes new cross-sector relationships for addressing development issues.
Leverage recruitment assessments that measure cognitive abilities and behaviors. Traditional Outsourcers currently engaged in or interested in Impact Sourcing should refine their assessment methods to be more focused on upfront cognitive and behavioral testing in order to find trainable individuals. To qualify as Impact Sourcing, Traditional Outsourcers will need to find individuals who are experiencing socio-economic hardship with limited opportunity for sustainable employment. This target population will likely not have the same educational or professional experience that Traditional Outsourcers normally seek, which is why cognitive and behavioral assessments will enable them to see how an individual is likely to identify an issue, and how they might address it.	• Helps identify suitable candidates at the beginning of the recruitment process. • Supports the ability to identify candidates with increased potential for long term employability. • Provides baseline data to help identify competency and skill gaps. • Leads to long term client satisfaction through an increased quality of hired employees.
Enhance onboarding activities to account for higher need individuals. Another key recruitment recommendation for Traditional Outsourcers is to enhance their onboarding activities to support successful assimilation of Impact Sourcing employees into their new professional environment. These enhancements may include providing more information about the Traditional Outsourcer's vision, values, culture and expectations, and providing the opportunity to develop relationships with appropriate mentors or coaches.	• Enables a structured assimilation to a new corporate/office environment. • Develops employee self-confidence in doing their job well. • Prevents potential performance issues by setting expectations and providing the additional support needed for employees to do their job. • Decreases attrition.

Recommended Recruitment Approach

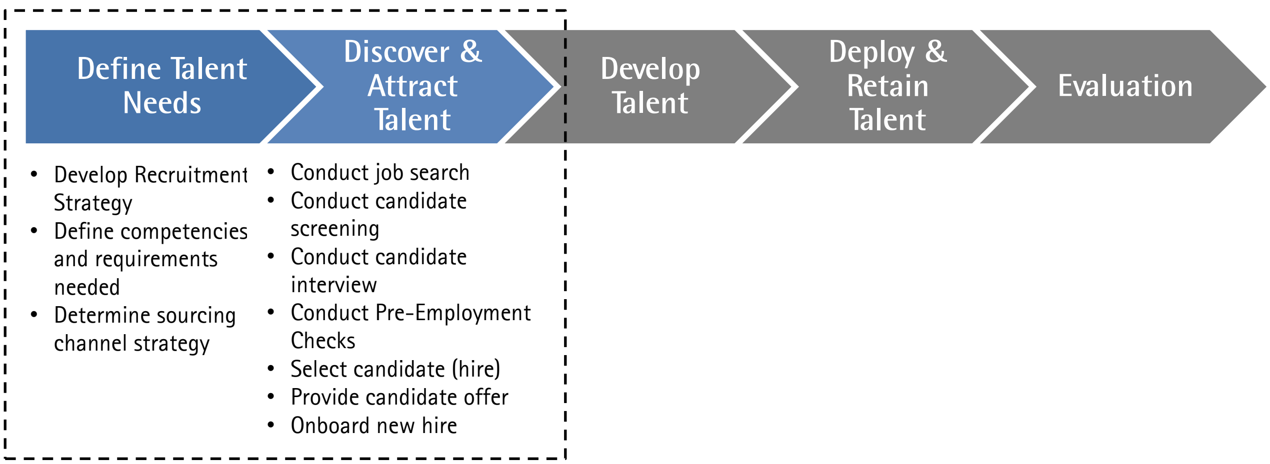
For this report, a Recruitment approach has been outlined for organizations interested, or currently engaged, in Impact Sourcing work. This approach provides current and new providers with guidance on enhancing recruitment processes and systems, as well as key metrics that can be used to measure performance in the context of hiring poor and vulnerable employees.

As an organization grows, the ability to recruit an appropriately qualified workforce is crucial. Since an organization's workforce typically drives that organization's productivity, the overall level of performance is largely dependent on the quality of its workforce.

Recruitment Process

Recruiting involves identifying, selecting and hiring people with the appropriate competencies or requirements to fill a job opening in an organization. The key components of the recruitment process are described below. The Appendix includes the process flows for the processes described in the approach.

Figure 9. Talent Life Cycle – Recruitment



Develop Recruitment Strategy

This is the process of defining the parameters to source, screen, and assess candidates based on the requirements of the job and of the socio-economic criteria for the Impact Sourcing organization. This also involves developing the Employee Value Proposition and recruitment brand to attract candidates and retain employees. Organizations should tie their recruitment strategy to their business needs, such as target population, client needs, or Corporate Social Responsibility (CSR) initiatives. Impact Sourcing organizations must have a good understanding of their business strategy before they can establish a clear recruitment strategy. The business strategy can answer questions, such as, "Where are we going to be in 2-5 years?", "What kind of roles are we going to be looking for based on market/client needs?" or "How do we identify the target disadvantaged?" Identifying the target disadvantaged is a fundamental element of an organization's business strategy in Impact Sourcing, which can be done by following these activities:

- **Define the target group –** Determine the workforce the organization wants to target: youth, women, disabled, etc. Organizations have different definitions for what they consider disadvantaged and that criteria needs to be defined

- **Research –** Identify locations/geographies to search for target population (e.g., rural, slums, major city, etc.). Consider collaborating with third party recruitment partners, such as NGOs or CBOs, to support the search for talent in target locations
- **Workforce Planning –** Analyze and forecast the talent the organization needs to execute its business strategy while also creating plans to address any current or future talent gaps

Developing a favorable brand can help attract and retain employees who want to work for an organization that differentiates itself from others, based on the kind of people that work for the organization, the type of work environment provided, and reputation in the industry. Also, as Traditional Outsourcers engage in Impact Sourcing, they can build their CSR brand, which can help attract talent that will want to work for an organization that supports a strong commitment to diversity and social responsibility. An example of how branding is an element of recruitment strategy and tied to marketing is the Dr. Reddy Foundation, which developed a brand named "LABS" (Livelihood Advancement Business School) that is advertised in posters, pamphlets and word of mouth. They are recognized in targeted communities for successfully providing training and employment to youth with limited opportunity for employment.

Another aspect of recruitment strategy is defining the Employee Value Proposition (EVP) to improve the organization's ability to attract, retain and engage talent. The EVP refers to what the organization promises its current and potential employees in terms of core values such as, "the organization is a great place to learn and grow", "we have a team of talented and professional people who work collaboratively", or "we are a good corporate citizen and living up to our social responsibilities". This provides a clear reason why a candidate would want to work for the organization. Upon defining the EVP and developing the organization's brand, the organization needs to communicate this information during the different phases of the recruitment process to attract potential candidates. The following table lists example EVP attributes that relate to Impact Sourcing:

Table 1. Employee Value Proposition Attributes

The Organization *Company's prestige in the market and work environment*	**Rewards** *Monetary and non-monetary rewards received*	**Opportunity** *Long term career development and enhancement*	**The Work** *Nature and quality of work and its alignment with your interests*	**The People** *Competent, respectable, and trustworthy individuals in the organization*
• Respect • Empowerment • Market Position • Camaraderie • Work Environment • Social Responsibility	• Compensation • Benefits • Vacation	• Future career opportunities • Education / Learning • Diversity • Risk taking	• Recognition • Focus on quality • Creativity and innovation • Job impact • Work-life balance	• People management • Manager quality • Co-worker quality • Collegial work environment

Define Competencies and Requirements

This is the process of recording the skills and experience to create a job description. Competencies are the set of skills, knowledge and behaviors allowing an individual to effectively and efficiently carry out their job. The table below includes examples of competencies, such as Teamwork, Communication, and Customer Service.

Table 2: Sample Competencies

Interpersonal Competencies	General Business Competencies	Technical Competencies
• Communication • Setting and Achieving Goals • Teamwork	• Data Gathering and Analysis • Customer Service • Functional	• Personal Computer Skills • Coding • Scanning

The goal of this process is to have clear job descriptions that outline the requirements and competencies needed to execute the job. Competencies and requirements provide organizations a benchmark in assessing a candidate's current skills and matching the right people to the right jobs as part of the Recruitment approach. It also contributes to the Training approach in identifying the training needed to up-skill the population that Impact Sourcing aims to target due to the lack of education or previous work experience[6]. Defining competencies and requirements usually is completed by Human Resources. It normally is not the responsibility of the Recruiter to develop this, but to use the defined competencies and job descriptions to find and assess candidates.

From the survey the team conducted, twelve ISSPs responded that they leverage a requirements checklist to evaluate candidates, while only four indicated that they evaluate candidates using a competency model. An Impact Sourcing organization needs to consider two types of competencies – core and functional. Core competencies ties to the organization's overall strategy of the talent they want to hire. Core competencies can support the organization's performance evaluation based on a defined set of values and behaviors that run across geographies or work functions, for example, adaptable to change, motivated to achieve goals, or analytical skills. Functional competencies are focused on the skills and knowledge needed to do the tasks in a job. Additional benefits of documented competencies and requirements are that it allows Recruiters to effectively communicate work opportunities to prospective candidates and set expectations of what is required of the candidate to be successful in their new job.

The Appendix contains an example of a competency model for a Digitization Processer.

[6] *Impact Sourcing Feasibility Study.* Accenture. 2012

Source Candidates

This is the process of determining the channels to find potential candidates. Organizations should identify the appropriate channels and process that will enable them to find the right talent that fit their criteria for Impact Sourcing. The process to find talent is what distinguishes recruitment for Impact Sourcing versus traditional outsourcing. Impact Sourcing seeks to recruit individuals who are poor, vulnerable with little or no education, and have limited opportunity for sustainable employment. Finding the right talent among these individuals require additional effort because Impact Sourcing organizations want to employ this target population that could be trainable and have the potential to be solid performers. Some organizations may also need to consider low cost sourcing methods based on their size or budget, which may limit the channels to find candidates. The sourcing strategies in this section offer ideas to increase the pool of candidates in order to assess and find the right talent for Impact Sourcing work.

Table 3: Recommended Sourcing Strategies

Sourcing Trends	Traditional Sourcing Methods
•Referrals (Everyone is a recruiter) •Social Media	•Collaboration with third party organizations (NGOs, CBOs) •Career Fairs •Print (pamphlets, newspaper) •Walk-ins

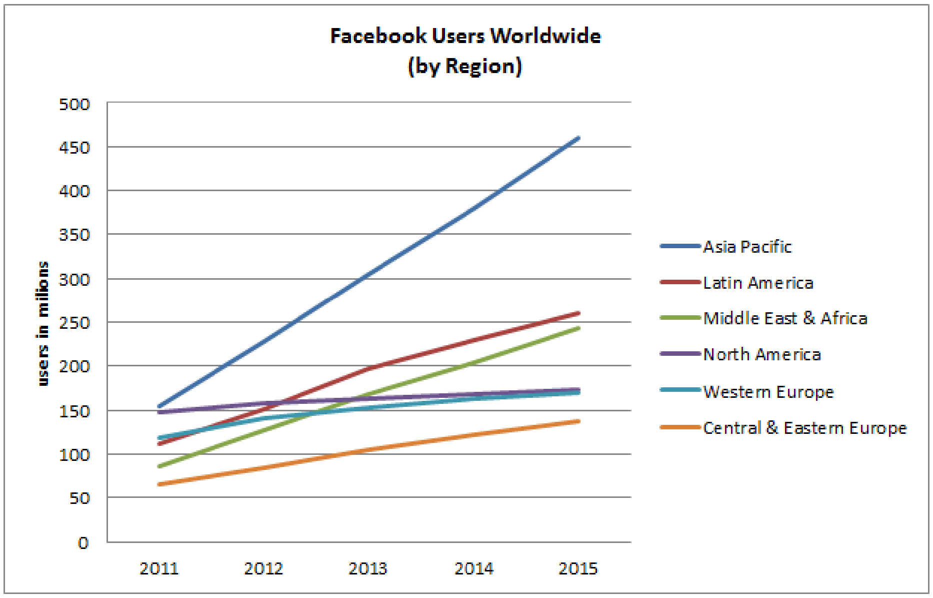
Based on our survey results, the most popular and low cost method of finding candidates for Impact Sourcing work was through referrals – word of mouth – from current employees and alumni. This follows the recruitment trend that 'everyone is a recruiter'. Referrals offer high returns given that employees normally refer candidates who are similar to themselves in terms of skills and cultural fit. A recruitment leading practice for referrals is developing an Employee Referral Program that motivates employees to be advocates for the organization and rewards them (monetary or non-monetary) for finding qualified candidates for the organization.

The next most common source was collaborating with third party organizations like NGOs, CBOs or schools to find individuals at target locations that fit the organization's Impact Sourcing criteria and that are trainable to do the type of work the Impact Sourcing organization employs. The level of collaboration with NGOs and CBOs varies per Impact Sourcing organization, based on the time and resources organizations have to search for candidates. The collaboration with NGOs and CBOs can be fruitful for smaller ISSPs that may not have the resources to find and assess potential candidates. Based on our research NGOs and CBOs have worked with Impact Sourcing organizations in various degrees. An NGO/CBO may find, assess and validate criteria (e.g., socio-economic hardship, education) of potential candidates or inform Impact Sourcing organizations of new communities that fit their criteria for the organization to recruit individuals on their own. For example, an organization such as Nairobits works with CBOs at different levels. Nairobits meets with CBOs regularly to discuss their sourcing needs, receive a pool of candidates and interview potential candidates jointly with the CBO.

Leading practice also indicates that including social media (e.g., Facebook, LinkedIn, YouTube) as a complement to other recruiting channels allows an Impact Sourcing organization to expand its search for talent and help promote employment opportunities and organizational brand. Social media is a key tool to establish communications and maintain relationships with passive candidates (i.e., those who do not know you are hiring). This channel may have little to no cost, depending on the type of account.

A recent study of Facebook user growth[7] shows the sharp growth (and expected growth) in developing countries.

Figure 10, Number of Facebook Users Worldwide



Although active candidates (i.e., those that know you are hiring) may be searching for a job, most of them may not possess the skills that Impact Sourcing organizations are looking for, or at least not enough of them. A way to close the skills gap of finding the right talent, which is a challenge for Impact Sourcing organizations, is to target passive candidates, which traditionally have been sought by NGOs and CBOs through their own network of schools and communities. However, Impact Sourcing organizations can locate, attract, and manage these potential candidates on their own through social media or fee-based recruitment technology by using a strong organizational brand, compelling job descriptions, and the organization's Employee Value Proposition.

The traditional route of sourcing talent through newspapers, posters, walk-ins and referrals continues to be effective, especially if an Impact Sourcing organization is located in an area that lacks a stable IT infrastructure. A 2012 study by CareerXRoads for US multinationals indicated that the top main sources of searching for candidates were referrals, career sites, job boards, and schools.[8] Traditional Outsourcers continue to schedule walk-ins that are advertised in newspapers and career sites. These providers have the resources to conduct a full day recruitment activity that includes HR screening, skills and telephone voice assessment, interviews and provide offer letters same day. ISSPs can also look at organizing similar activities in searching for targeted populations; even if the walk-in recruitment activity can be conducted in one to three days, this streamlined recruitment process can save candidates the time and cost of travelling to an organization's office multiple times. Another activity that organizations should consider is a career fair for mass hiring for the opening of a new outsourcing center or in conjunction with a local school's activities. Interestingly, some interview participants shared creative methods of attracting talent such as performing a small theater act during a town fair that describes the job opportunities the Impact Sourcing organization can provide to adverts in a local television station.

[7] Emerging Markets Drive Facebook User Growth, eMarketer, May 9, 2013.
http://www.emarketer.com/Article/Emerging-Markets-Drive-Facebook-User-Growth/1009875

[8] *2013 Source of Hire Report.* CareerXRoads. 2013

Job Search

The process for a candidate to apply for a job with an organization may require the candidate to complete a registration form created by the organization. Since target candidates may not have a resume or curriculum vitae, the registration form is recommended for organizations to obtain general profile information on the candidate (e.g., name, address, phone number, school information, previous work experience) and it can serve as a baseline assessment that asks candidates for information on their level of functional skills, confidence or living conditions. The information captured on the registration form can assist recruiters to identify and assess the qualities they are searching for in a candidate, which should be in compliance with local laws and customs.

Screen Candidate

Screening a candidate is the process of assessing the individual's background, skills, experience, and motivations against those outlined in the job the Impact Sourcing organization employs, and to see if the candidate is a close match or trainable for the job.

The methods to find and select the best talent possible for Impact Sourcing jobs include the following:

- Pre-screening registration forms to eliminate candidates who do not meet the basic criteria and requirements of the Impact Sourcing organization.
- Preliminary assessment to screen out candidates who lack the desired level of behavioral factors, cognitive ability and/or competencies for the job.
- In-depth assessment through interviews and job simulations to select candidates who are trainable.
- Conduct a pre-employment check to verify the candidate's stated socio-economic hardship and qualifications are in line with the Impact Sourcing organizations criteria and requirements.

Different assessment methods are available depending on the role. For example, an organization can pre-screen candidates using web-based tools before a recruiter interviews the candidate for high volume roles such as Data Entry or Call Centers. There are two types of assessment methods an organization should consider to determine if the candidate can perform the job effectively: KSA-based assessment (knowledge, skills and abilities) and task-based assessment.[9] Based on our research, most ISSPs conduct a blend of preliminary task-based and KSA-based assessments to screen candidates during the recruitment process. Traditional Outsourcers who normally recruit college graduates but want to employ poor and vulnerable individuals for Impact Sourcing work may need to reconsider how they assess Impact Sourcing candidates. The target populations Traditional Outsourcers want to employ for Impact Sourcing are at a disadvantage compared to college graduates in testing their knowledge and skills. Traditional Outsourcers should consider adjusting their recruitment assessments to the target population for Impact Sourcing work by focusing their assessments in measuring cognitive abilities and behavior, which may help determine if the candidate can be trained to do the job.

[9] *Selection Assessment Methods.* Society for Human Resource Management (SHRM). 2005

Table 4: Assessment Methods to Screen Candidates

KSA-based Assessment *(Knowledge, Skills and Abilities)*	Task-based Assessment
Cognitive ability test measures a variety of mental abilities, such as verbal and mathematical ability, reasoning ability and reading comprehension. For example: ○ Reading comprehension assessed by providing a 1-2 paragraph story with 7-10 questions on elements of the story ○ Grammar test on punctuation, capitalization, tenses, sentences	**Situation judgment test** provides candidates with situations that they would encounter on the job and possible options for handling the presented situations. For example: ○ Questionnaire with a scenario (e.g., how to deal with customer complaints) and multiple choice options to respond to the scenario ○ Provide a scenario during an interview and allow the candidate to respond with their own ideas
Behavioral / Personality test looks at the personality factors that are assessed most frequently in work situations include conscientiousness, extraversion, agreeableness, openness to experience and emotional stability.	**Work sample test** consists of tasks or work activities that mirror the tasks that employees are required to perform on the job. For example: ○ Written or hands-on test on basic computer skills, such as how to close a window on the desktop or how to bold text in a Word document
Job knowledge test measures critical knowledge areas that are needed to perform a job effectively. Job knowledge tests are used in situations where candidates must already possess a body of knowledge prior to job entry.	
Structured interviews consist of a specific set of questions that are designed to assess critical KSAs that are required for a job. They are used most frequently to assess softer skills such as interpersonal, communication, leadership, planning, organizing and adaptability.	

Assessments can be delivered in a wide range of methods – written, computer based, interview, or mobile form. An organization will need to determine the best method to assess candidates for employment based on the job description and competencies that are required to perform the job. Leading practices leverage assessments that are on a web-based platform. Examples of web-based platforms:

- **Versant** (Pearson) is an automated spoken and written language tool that is commonly used to test English proficiency of potential call center candidates (www.versanttest.com/products.jsp)
- **HireVue** is a digital platform that delivers in-person, video and on-demand interviews to a computer or smartphone (ww.hirevue.com)
- **PAN** delivers online assessments to assess candidate personality, skills and knowledge (www.panpowered.com)
- **Talent Lens** (Pearson) is an online assessment on workplace personality, learning ability and basic skills (us.talentlens.com/identify-talent)
- **SHL** provides diverse industry and functional online assessments in multiple languages (www.shl.com/us/solutions/talent-acquisition/)

- **PSI** delivers online assessments to test candidate skills and knowledge (corporate.psionline.com/assessment/)
- **Assessment Leaders** delivers online assessments to test candidate skills and knowledge (www.assessmentleaders.com/pages/skills_testing)
- **Assess Typing** is a website that provides customizable online typing tests (www.assesstyping.com)

In addition to these assessment methods, an organization should also conduct in-person or phone interviews to build a rapport with candidates to understand their motivations, desires, and expectations. Interviewed Impact Sourcing organizations indicated they leveraged different types of assessments such as general interviews or written tests to assess a candidate's English skills, hands-on test to assess a candidate's knowledge of a computer (e.g., turn on a computer, use a mouse), and a reading comprehension exam with instructions to test a candidate's ability to follow instructions and writing skills.

Interview Candidate

Interviewing is normally face to face with the candidate and the hiring organization. It is a detailed review of the candidate's skills, knowledge and experience against the job profile. It is leading practice to incorporate competencies into the factors used to evaluate candidates. Interviewing should include structured questions that are designed to assess critical knowledge, skills and abilities that are required for a job. It is also important to train interviewers to effectively ask questions and understand what they are looking for from the candidate's response to determine if the candidate is a right fit for the job or trainable to perform the job. This may be further enabled through the use of an interview guide with documented questions.

An interview guide provides a structured and fair process for interviewing. It makes it possible to concentrate on selecting the best candidates while minimizing the impact of "gut feelings" in hiring. Interview guides have several sections:

- **Interview Opening:** How to conduct introductions and provide an overview of how the interview will be conducted (e.g., note taker role, who is asking questions, duration of the interview)
- **Background questions:** To confirm that the applicant's skills and background meet the requirements of the job and the socio-economic criteria of the Impact Sourcing organization
- **Interview Questions:** Structured interview questions aimed at obtaining examples and stories about key attributes of the candidate
- **Interview Close:** Instructions on how to close the interview while conveying the values of the organization, and provide next steps
- **Interviewer rating worksheet:** Record notes and rate how well the candidate fit the key attributes of the role

The Appendix provides sample questions that can trigger ideas to build structured interview questions and a sample interview guide that an organization can leverage as a template to build their own interview guide.

Conduct Pre-Employment Check

This is the process of checking that the information provided by the candidate is correct and obtaining further validation of the candidate's qualifications based on the organization's requirements (e.g., socio-economic hardship, living conditions). Impact Sourcing has specific requirements. In addition to looking for talent with the right skills, the talent must also demonstrate a socio-economic hardship level (e.g., gender, limited employment opportunity, geography, physical disability, loss of a parent), which should be in compliance with local laws and customs. Based on the interviews and surveys, the most common forms of verifying recruitment criteria are through interviews, documentation, and reference checks conducted by schools, NGOs or CBOs. Other forms of verifying recruitment criteria include conducting home visits, speaking with parents or guardians, and reviewing school marks (records). Depending on the organization's size or available resources, there may be a dedicated resource that is responsible in verifying candidate criteria or an organization may depend on NGOs and CBOs to verify their recruitment criteria.

Candidate Selection (Hire) and Onboard New Hire

Selection is the decision making process that involves comparing all those candidates that have been through an interview to select the most suitable (assuming they meet the requirements). Providing an offer to the candidate is the process of verbal and then written offer of employment to a candidate.

Onboarding is the set of activities that need to be performed to ensure the newly hired employee arrives with any pre-hire work completed (e.g., signed forms) and that the organization is ready to receive them (e.g., security badge, desk, etc.) It is important that onboarding takes place as the candidate starts at the organization to give them a sense of belonging before moving into their job. Elements that organizations need to incorporate in their onboarding practice for Impact Sourcing employees are:

- **Role clarity –** the employee understands their new job and all related expectations
- **Social integration –** explain interpersonal relationships and information networks that new employees must establish; consider developing a "buddy" system where the new employee has someone to navigate them through the organization
- **Knowledge of culture –** provide employees an overview of organizational standards, and basic legal and policy-related rules

Traditional Outsourcers should also consider enhancing their current onboarding activities to account for higher need individuals employed in Impact Sourcing work. These employees may require more information about their new job and expectations for performance and additional time to assimilate to their new environment. To ease this transition to a new environment, a mentor program could be set up for these employees with experienced employees employed for Impact Sourcing work to provide morale support and advice.

SHRM research[10] on new employee onboarding shows that when onboarding is done correctly, it leads to:

- Higher job satisfaction
- Organizational commitment
- Lower turnover
- Higher performance levels
- Career effectiveness
- Lowered stress

[10] *Onboarding New Employees: Maximizing Success.* Society for Human Resource Management (SHRM). 2010

Recruitment Roles and Responsibilities

The next set of components of the Recruitment approach is the people who are responsible to execute recruitment activities. Based on our interviews and survey results, the resources that recruit candidates are either dedicated full-time to recruitment or share this responsibility with other functions within the organization. Some organizations we interviewed also collaborate with NGOs and CBOs to conduct most of these recruitment activities.

These are standard recruitment roles; however we recognize that most organizations may not have enough resources to dedicate full-time to these recruitment roles or activities.

Table 5. Recruitment Roles and Responsibilities

Lead Recruitment Roles	
Hiring Manager	• Person requesting the job position, typically the future supervisor/team lead of the job position being filled • Identify and hire the most qualified candidate to fill the open job position • Onboard new hires
Recruiter	• Person responsible for completing recruitment activities for the office / region • Ensure the recruitment process is conducted in a timely and effective manner • Responsible for identifying sourcing channels to find talent • Establish and maintain relationships with third-party organizations to find talent (e.g., NGOs, CBOs, schools) • Manage recruitment team – Recruitment Coordinator, Reporting/Analytics Administrator
Additional Recruitment Roles	
Recruitment Coordinator	• Perform administrative tasks, such as gathering and reviewing documentation to confirm candidate fits the organization's requirements, scheduling interviews, advertising jobs, and maintain onboarding documentation • Conduct home visits (as needed) to validate candidate's financial and family criteria
Reporting/Analytics Administrator	• Responsible for managing and generating reporting for recruitment activity to Recruitment team and Human Resources • Analyzes reporting results to identify process gaps and needed improvements

Recruitment Technology

There are many recruitment applications in the market that can automate the recruitment process for organizations interested in, or currently engaged in, Impact Sourcing. Integrating a recruitment application can improve an organizations efficiency to track, manage and onboard candidates through the process. An organization will need to take into account cost, infrastructure (e.g., internet connectivity) and resources to manage the application. While these applications are typically leveraged by larger, enterprise organizations, they may become feasible as Impact Sourcing Service Providers increase in size.

These are some questions to ask about the use and selection of recruitment technology within an organization:

- Do you believe that your recruitment process can be strengthened by using recruitment technology?
- What do your current recruitment technology/tools look like?
- Do you have a recruitment portal/website strategy in place that integrates with overall recruitment technology/tools and candidate sourcing?
- Do your existing recruitment technology/tools support the end-to-end process?
- Do your existing recruitment technology/tools provide adequate reporting?
- How should effective recruitment technology look like?

Table 6. Best of Breed Recruitment Technology

<table>
<tr><th colspan="2">Talent Management Applications:</th></tr>
<tr><td>• HireCraft - www.hirecraft.com
• HR Soft – www.hrsoft.com
• HRsmart – www.hrsmart.com
• Jibe - www.jibe.com
• Kenexa – www.kenexa.com
• Kronos – www.kronos.com</td><td>• Lumesse – www.lumesse.com
• Peoplefluent – www.peoplefluent.com
• SuccessFactors - www.successfactors.com/en_us.html
• SumTotal – www.sumtotalsystems.com
• Taleo - www.oracle.com/us/products/applications/taleo/overview/index.html</td></tr>
<tr><th>Candidate Relationship Management Applications:</th><th>Job Distributor / Aggregator:</th></tr>
<tr><td>• Avature - www.avaturecrm.com
• jobs2web - www.jobs2web.com
• LinkedIn Talent Pipeline - talent.linkedin.com/talentpipeline/home
• SourcePoint - www.airsdirectory.com/mc/products_sourcepoint.guid</td><td>• Data Frenzy – www.datafrenzy.com
• eQuest - www.equest.com</td></tr>
<tr><th>Human Resources Applications:</th><th>Pre-Employment Check Applications:</th></tr>
<tr><td>• PeopleSoft – www.oracle.com
• SAP – www.sap.com/index.epx
• Workday – www.workday.com</td><td>• HireRight - www.hireright.com</td></tr>
<tr><th colspan="2">Interactive Voice Response (IVR) and Video Interviewing Applications:</th></tr>
<tr><td colspan="2">• HarQen – harquen.com
• HireVue – hirevue.com</td></tr>
<tr><th colspan="2">Onboarding Applications:</th></tr>
<tr><td colspan="2">• Taleo – www.oracle.com/us/products/applications/taleo/overview/index.html
• RedCarpet - www.silkroad.com/HR_Software/RedCarpet-Onboarding-Software/Overview.html</td></tr>
<tr><th colspan="2">Applicant Tracking System (ATS):</th></tr>
<tr><td colspan="2">• JobVite – recruiting.jobvite.com
• Kenexa – www.kenexa.com
• Taleo - www.oracle.com/us/products/applications/taleo/overview/index.html</td></tr>
</table>

Recruitment Maturity Levels

The purpose of a maturity model is to describe success factors at various levels of maturity, or scales of mastery, as an organization develops. Critical success factors describe the attributes that an organization needs to successfully meet its goals. For each success factor, the maturity model will list descriptions at various maturity levels (Emerging, Basic, Advanced, High Performance). The maturity model below lists success factors that relate specifically to recruitment.

Using the methodology provided in the maturity model section, organizations should examine their current recruitment capability to determine where they are in the maturity model and implement strategies, as needed, to advance in the model. Additionally we've included Maturity Assessments in the Appendix to help organizations determine their recruitment maturity level.

Table 7. Maturity Model – Recruitment

Process	Emerging (1)	Basic (2)	Advanced (3)	High Performance (4)
Develop Recruitment Strategy	• Organization has limited understanding of the implications of recruitment strategy on other talent management processes (e.g., training) • Recruiters are trained to represent the brand/EVP and act as advocates • Little consistency and clarity on roles and responsibilities • Talent forecasting is informally performed	• Organization has some fair understanding of the implications of recruitment strategy on other talent management processes (e.g., training) • Employment brand/EVP attracts good and unsolicited talent • There is awareness of roles and responsibilities • Structured talent forecasting exists and is at least 60% accurate	• Organization has fair understanding of the implications of recruitment strategy on other talent management processes (e.g., training) • Employees and recruiters proactively act as brand/EVP promoters • There is an understanding of roles and responsibilities • Structured and consistent talent forecasts are linked to overall talent strategy and sourcing strategies	• Organization has full understanding of the implications of recruitment strategy on other talent management processes (e.g., training) • Organization actively participates in and influences content and brand sentiments in the industry and social networking spaces • Structured and full knowledge of roles and responsibilities • Talent forecasting identifies critical skills gaps and strategies to close them (e.g., new markets, new criteria)
Define competencies and requirements needed	• Competencies and requirements are not defined • Recruiters have inconsistent knowledge of skills and experience they require to hire • Job descriptions are primarily made based on "personal experiences" and are not competency/skill based descriptions	• Competencies and requirements defined for entry level jobs • Recruiters are aware of the skills and experience they require to hire but there is ad hoc usage of competencies • Some competencies and skills are documented required for some job description	• Competencies and requirements defined for all open jobs • Recruiters are aware of the skills and experience they require to hire and there is consistent usage of competencies • The majority of the competencies and skills are documented for each job description • Competencies linked to Learning	• Competencies and requirements defined for all jobs and continuously updated based on market needs • Each job description has documented competencies and skills for each job description

Process	Emerging (1)	Basic (2)	Advanced (3)	High Performance (4)
Determine candidate sourcing	• Candidates are recruited through word of mouth or non-technical means • Sourcing channel practices are not centralized or controlled across the organization and as a result the total sourcing related spend is not known within the organization • Passive candidate attraction techniques are not common place • Recruiters have minimal collaboration relationship with NGOS/CBOs to source talent	• Candidates are recruited through multiple traditional channels (e.g., referrals, advertisement) • Sourcing channel practices are centralized or controlled across the organization and as a result the total sourcing related spend is known within the organization • Passive candidate attraction techniques are in place • Recruiters leverage their own network of contacts (e.g., NGOS/CBOs) to facilitate direct sourcing	• Basic candidate portal (e.g., organization website) used with effective search capabilities • All sourcing channels are reported against through each stage in the recruiting process to enable effective quality assessment per channel per stage in recruitment to enable the most cost effective and value adding to be adopted • Recruiters conduct up-front structured discussions with team and set fact-based expectations for sourcing and Time-to-Fill	• Use recruitment application to search and manage talent • Analytics continually determine optimal sourcing channels based on metrics (e.g., costs, retention, performance) • Candidates and new hires are surveyed on the sourcing channels they used in order to build a profile of sourcing habits • Passive candidate management is proactively practiced (in alignment to the Talent forecast) and the database is maintained and kept up to date through regular communication with the passive candidates
Conduct candidate screening	• There is no screening method used to filter out unsuitable candidates before they are reviewed by the recruitment team • Not all the candidates are reviewed by recruitment before they are assessed for an interview	• There is a screening method in place to filter out unsuitable candidates before they are reviewed by the recruitment team. • All candidates are reviewed by recruitment before going to the next step of interviewing	• The questions used are predominantly consistent across each competency but do not necessarily vary to effectively determine competency proficiency for a particular role • Recruiters use competency-based assessments (written, online, phone) to screen candidates	• The online or in-person screening conducted in the first phase removes a large proportion of unsuitable candidates from the process • All screening results are recorded against the candidate's record
Conduct candidate interview	• The organization uses ad hoc, undocumented questions that are not linked to job description or competencies	• Interviewers are trained, follow interview guides with elementary interview questions that are related to competencies • There is a lack of interview notes recorded on the candidate's record	• Interviewers are trained and follow interview guides with structured interview questions • Candidate is assessed against pre-defined competencies • Capturing interview feedback is always a time consuming process for the recruitment team and results in large numbers of candidate having no	• All interviewers are trained and competent in interviewing candidates • Follow interview guides with structured interview questions • Candidate is assessed against pre-defined competencies • On-demand voice and/or video interviews improve candidate access and reduce travel

Process	Emerging (1)	Basic (2)	Advanced (3)	High Performance (4)
			formal interview feedback against their records	burden • Interview feedback for all candidates is stored within the candidate's record • Candidate feedback about their experience in the recruitment process is captured
Conduct Pre-Employment Checks	• Perform ad hoc review of candidate's background against the organization's criteria	• Perform basic review of candidate's background and records to verify eligibility against the organization's criteria	• Follow documented process to review candidate's background and records to verify eligibility against the organization's criteria	• Pre-employment checks are automated and integrated in recruitment process • Collaborate with NGOs and CBOs to verify candidate eligibility
Select candidate (hire) and Onboard new hire	• Hiring decisions are based on candidate interviews • Conduct informal manual onboarding (ad hoc basis)	• Hiring decisions based on candidate interviews and result of requirements check • Automated onboarding for all new hires and integrated with employee/HR systems and processes	• Hiring decisions based on structured interviews that test skills set and result of requirements check • Onboarding activities (forms, administrative activities) are completed pre-start to enable a faster ramp-up	• Hiring decisions based on results of advanced selection processes (e.g., structured interviews, competencies, job profiles) • Onboarding can occur via mobile devices • Assign a "buddy' for all new hires

Recruitment Metrics

Below are basic recruitment metrics that an organization can use to measure and improve their recruitment process. One of the most critical metrics is Time to Fill (TTF), which measures the average number of days from when you receive the request for staffing to when the employee starts their job. This metric usually fluctuates based on supply and demand for talent, which has the potential to change significantly, quickly and often. Analyzing Time to Fill also helps reveal strengths, weaknesses, opportunities and areas for improvement in the recruitment process. The Society for Human Resources' (SHRM) research revealed that the average time to fill per position across the board is 33.28 days. If an organization's average TTF is greater than one month, then the organization should evaluate its recruitment process objectively to identify what is preventing the timely acquisition of talent.[11] This benchmark may hold true for Traditional Outsourcers that have the people and technology to find and employ individuals in Impact Sourcing work. However, ISSPs may not be able to meet this general Time to Fill benchmark, which means they should consider creating their own benchmark based on an average for the overall Time to Fill for jobs they employ. As the Impact Sourcing industry grows, eventually there may be an opportunity to obtain an average Time to Fill benchmark and other metrics among ISSPs and compare them with Traditional Outsourcers to determine gaps in the process and opportunities for process improvement in the future.

Table 8. Recruitment Metrics

Metric	Description
Number of Open Positions	Number of open positions actively being recruited
Total Number of Applicants	Total number of applicants received
Time to Fill	From the date the open position is received minus the date the individual starts on the job = Time to have individual start employment (includes weekends and holidays)
Percentage of Offers Accepted	Number of offers accepted by candidates / Total number of offers made
Percentage of candidates presented who were interviewed	Number of candidates presented to the recruiter and the percentage that were interviewed
New Hire Performance	Measurement through client evaluation of the employee's performance
Recruiting Cost Ratio	Total compensation the employee received (base salary for their first year) / Total recruiting costs (sum of all recruiting costs such as advertising, travel costs, recruiter salaries) multiplied by 100 to get a percentage (Excludes technology costs)
Candidate Satisfaction with Recruitment Process (e.g., advertising, candidate experience)	5-point scale survey
Hiring Manager satisfaction with candidate(s)	5-point scale survey
Average Tenure	Average tenure of regular full-time staff who were hired since (date) and who have departed (voluntarily or involuntarily) between Fiscal Year start date and Fiscal Year end date

[11] *Staffing Metrics: 'Time to Fill' Can Kill Prospects of Landing Top Talent.* Society for Human Resource Management (SHRM). 2012

Training

Training is the set of organized activities aimed at imparting information and/or instructions to improve a recipient's performance or to help them attain a required level of knowledge or skill to do their job. In the context of Impact Sourcing, training is especially critical given the focus on hiring those who come from poor and vulnerable communities. Individuals in this sector are hired to do jobs for which they may have not had any prior context or exposure, and they may have had limited access to education in general. Therefore, these individuals require an increased amount of training in order to provide them a foundational set of skills to enable them to succeed in an IT-enabled job.

The following section outlines key findings in the Training space for Impact Sourcing Service Providers (ISSPs), and provides recommendations for ISSPs, and those currently engaged or interested in hiring individuals from poor and vulnerable backgrounds.

Key Training Issues

- Lack of consistent training programs in the industry
- Disadvantaged individuals have a varied level of knowledge/ education / soft skills
- Quality, cost and scalability of training
- Inability to update the training material as needed
- Understanding of English Language

Recommendations for ISSPs:

- Provide standard training approach for new entrants in Impact Sourcing industry to leverage
- Provide modularized training that can be easily edited
- Apply a blended approach to learning
- Manage and track training using an LMS
- Enhance metrics by measuring business value of training

Recommendations for Traditional Outsourcing Providers:

- Provide standard training approach that existing organizations can use as a baseline to measure and improve current training
- Establish relationships with NGOs, CBOs and training institutes
- Develop mentoring program

Additionally, a comprehensive Training Approach is provided below that can be leveraged by ISSPs and Traditional Outsourcers to help provide foundation and in-demand skills to this growing workforce, decrease their "time-to-proficiency", and ultimately help Impact Sourcing practitioners become high-performers as the Impact Sourcing industry continues to grow.

Findings

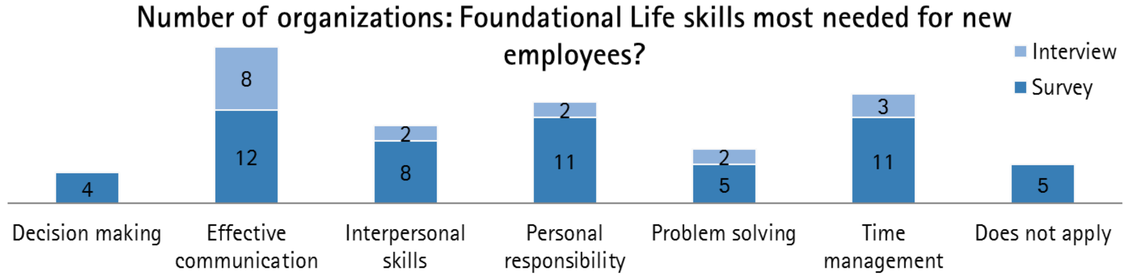
From the interviews and surveys, a number of positive techniques were identified that are working well for training disadvantaged employees for Impact Sourcing jobs:

- Direct learning from experienced tradespeople and peers
- Visual aids from YouTube and in-house video
- Highly interactive classroom sessions, with repetition, breakout sessions, scenarios, and interaction with peers
- Online classes that are self-paced
- Leveraging local language to explain concepts
- Constant review of trainees

A number of challenges emerged from the data as well, including:

- Lack of consistent training programs (i.e., formal vs. ad-hoc)
- Perceived longer time-to-competency to bring employees up to a foundational level
- High costs of training, including the support of instructor-led training delivery, as well as creation and updating of materials
- Keeping trainees present, focused, and punctual
- Understanding of basic English

From the survey, we found that organizations who currently engage with and train poor and vulnerable individuals indicate that effective communication is the most needed foundational skill for new employees.



And consistent with previous research from the Monitor Group, we heard that transitioning to a work environment where employees are required to work for long stretches of time at a desk in front of a computer can be a challenge and requires expectation setting and preparation.

Other includes: Eye for quality, recognition of handwriting

In terms of instructional delivery methods, we found that classroom and on-the-job training are the most common forms of training delivery. Web-based training is increasingly being used in order to leverage high-quality, standardized training which can often be leveraged at little to no cost. For example, Digital Divide Data uses an online typing tool to measure and improve keyboard skills.

Other includes: e-learning platform with various client certification processes

Key Recommendations for ISSPs

A set of recommendations were developed based on survey findings to improve training practices for Impact Sourcing. There are a different set of recommendations for ISSPs because they already train and prepare disadvantaged individuals for outsourcing work; whereas BPOs have to modify their existing training practices to prepare disadvantaged individuals with limited education or experience.

Recommendation for ISSPs	Why This is Important
Develop a standard approach to training that includes leading practice in delivery methods and objectives, which serves as a baseline for training in the Impact Sourcing industry. New entrants in Impact Sourcing can leverage the training approach to build their own training program. The approach also allows existing organizations to assess their current training program and determine what they can use to enhance or update their existing training content and delivery.	• Reduces training costs for new entrants to Impact Sourcing to skill up their employees in a timely manner using a standard industry curriculum. • Ensures that an Impact Sourcing organization's course development efforts produce consistent results. • Establishes standards to develop employees in Impact Sourcing.
Provide modularized training that can be easily edited. A module is a course or short segment of a training program. Modular training optimizes training delivery time, increases comprehension, and allows for targeted refresher training as needed. For example, new or recently promoted employees can take only the training needed for their new job and employees interested in a job transfer or promotion can learn about the new job through training before applying for the position, but without spending significant time.	• Reduces cost of design and delivery of training by editing short segments of training. • Reduces time to competency by taking "nuggets" of training as needed. • Saves time for the employee to take training and not be away from work for long periods of time.
Apply a blended approach to learning, which is the industry standard for training and is used in effective training programs in many successful organizations. Blended learning can provide standard business process and life skills overview training in an eLearning format, while providing hands-on, experiential learning for key job-specific activities.	• Serves as a way to move some training to an eLearning platform, which is inherently more cost effective and scalable. • Allows flexibility for employees to take training at their own pace. • Reduces costs and maximizes effectiveness by matching the best delivery method for each course (ILT, WBT). • Provides cost-effective way to relieve overcrowded classrooms.
Manage and track training delivery by using a Learning Management System (LMS), which can enable an Impact Sourcing organization to administer training in a centralized manner. An LMS also provides the enhanced capability to automate training by tracking and delivering online training.	• Creates an online platform to make it easier to author, manage and deploy eLearning. • Allows employees access to training anywhere anytime at their own pace. • Enables cost-savings of eLearning (e.g., less travel, lower teaching costs) as well as streamlines the administration of training for a greater number of geographically dispersed employees.
Enhance metrics to measure the business value of training such as error reduction rate or call handling	• Enables the organization to measure the effectiveness of the training program by

Recommendation for ISSPs	Why This is Important
time. Impact Sourcing organizations measure traditional learning transactions such as enrolment, completion, or hours delivered. Organizations should evaluate the impact of their training to improve the efficiency and effectiveness of learning programs, identify specific areas for workforce improvements, and identify learning programs with the most impact on key business performance metrics.	identifying areas for improvement and gaps in training content. • Identifies the need for additional training for an employee based on the quality of their work output (e.g., call handling time, data entry errors) and ensures client service level agreements (SLAs) are met by employees.

Key Recommendations for Traditional Outsourcing Providers

Recommendation for Traditional Outsourcing Providers	Why This is Important
Establish relationships with NGOs, CBOs and donors for pre-employment training. Impact Sourcing organizations such as Digital Divide Data and Techno Brain leverage NGOs to provide life skills and foundational training. Traditional Outsourcers can also leverage this type of approach, recognizing that NGOs often have greater experience in this space. As identified in Avasant's report[12], donor organizations can act as funding agents for these types of training initiatives.	• Leverages the skills and core competencies of organizations that have experience in working with poor and vulnerable individuals. • Establishes new cross-sector relationships for addressing development issues. • Reduces costs and risks associated with training disadvantaged workers.
Seek opportunities to enhance NGO, CBO and training institutes in poor communities. Traditional Outsourcers, through their corporate social responsibility programs, should lend their expertise to NGOs and CBOs for enhancing and refining training programs in poor and vulnerable communities. While efforts should be focused on social betterment, this type of program can sometimes bring about the hiring of disadvantaged employees. For example, Accenture personnel helped to create a BPO curriculum for Dr. Reddy's Foundation (DRF) in India. Seven individuals from DRF were eventually hired into the Accenture outsourcing practice[13].	• Provides opportunity to increase CSR (Corporate Social Responsibility) footprint. • Establishes a new sourcing channel with organizations with deep experience in working with the poor and vulnerable.
Extend and enhance (or create) a mentoring program for employees hired into Impact Sourcing jobs. Providing a formal linkage between experienced employees and those newly hired from a poor or disadvantaged background can increase engagement (for both mentor and mentee), enhance training, and ultimately improve retention[14].	• Helps to provide an informal, cost-efficient way to get employees up-to-speed. • Provides employees guidance to find their way around the organization and access to resources to be effective in their jobs.

[12] *Incentives & Opportunities for Scaling the "Impact Sourcing" Sector*. Avasant. 2012
[13] http://www.accenture.com/in-en/company/india-citizenship/Pages/dr-reddy-nasscom-foundation.aspx
[14] http://www.techrepublic.com/article/how-mentoring-produces-benefits-across-the-board/1053697

Training Approach

As part of this research, an Impact Sourcing Training Approach has been developed for organizations interested, or currently engaged, in Impact Sourcing work. This approach provides current Impact Sourcing organizations with frameworks and examples on leading practices in order to enhance or build a successful training program. Additionally, this approach can provide new entrants to Impact Sourcing (e.g., Traditional Outsourcers) a set of guidelines for adjusting and/or enhancing their existing programs to allow for training of poor and vulnerable employees.

Developing effective training and performance support, and investing in training up front, is critical to building employee capabilities, confidence, and reducing errors on the job, thus providing long-term cost savings to an organization. Success is dependent on developing employee competency in a timely manner to perform their job.

The Training Approach consists of seven major elements:

1. **Training Process –** Identify the tasks for training in the Talent Life Cycle
2. **Training Maturity Model –** Determine the maturity of the organization's training function
3. **Training Needs Assessment –** Understand training audience needs and required learning outcomes and then match them to the curriculum
4. **Training Curriculum –** Determine the most effective training delivery methods and develop an effective role-centered curriculum
5. **Learning Paths –** Provide the appropriate training for employee roles
6. **Training Administration –** Administer, plan, manage and track courses
7. **Training Assessment –** Leverage Kirkpatrick Evaluation model for assessing training effectiveness and evaluating trainee knowledge and preparedness upon completion of courses

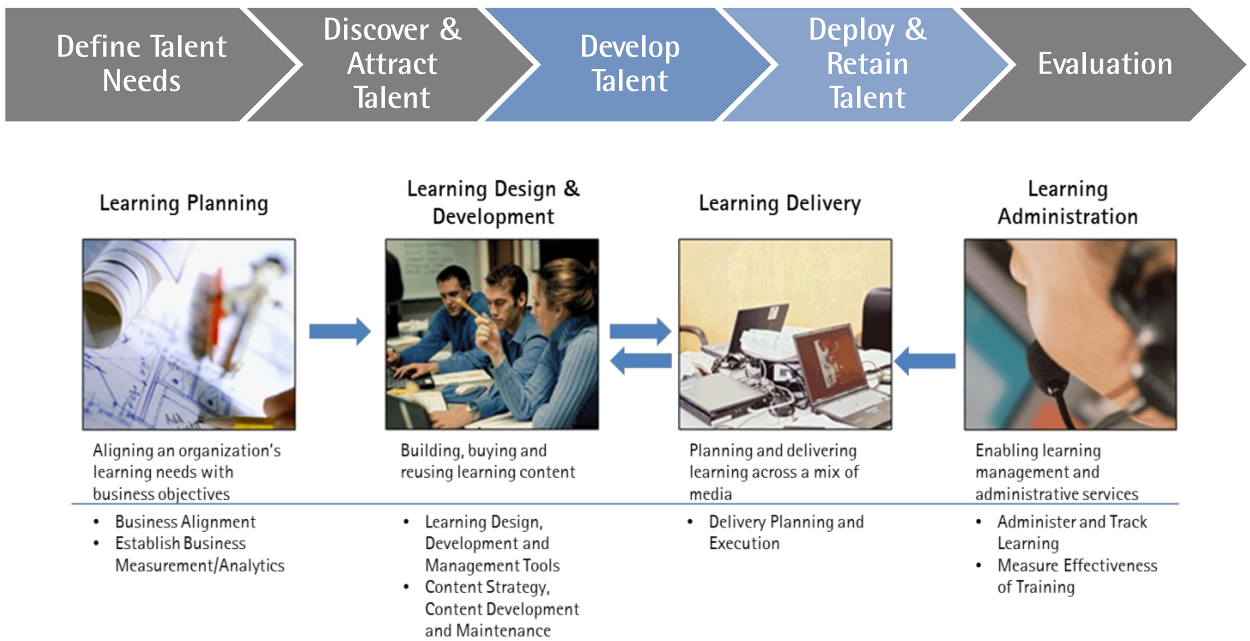
The Training approach includes leading practices and innovative ideas to assist organizations in developing and maintaining a strong training program for under-privileged employees in the Impact Sourcing sector. The process consists of determining the current state and needs of the trainee, defining the end goal of instruction, and providing support to assist in the transition to their new job.

Training Process

During the interviews and surveys, we asked Impact Sourcing organizations about their training process. Organizations such as Anudip partner with third parties to develop their training curriculum. Digital Divide Data and Techno Brain rely on CBOs to train life skills and workplace skills. Samasource, Invincible Outsourcing (Maharishi) and Dr. Reddy's Foundation develop their own training.

The training approach follows the recruitment approach in the Talent Life Cycle and focuses on Developing Talent and Deploying and Retaining Talent.

Table 9. Talent Life Cycle – Training



Source: Accenture Talent Life Cycle, 2012

The four process areas associated with developing, deploying and retaining talent include Learning Planning, Learning Design & Development, Learning Delivery and Learning Administration. In order to fully understand the concepts we should first define the terms.

Table 10. Training Tasks and Definitions

Process	Tasks	Definition
Learning Planning	Business Alignment	Create a learning governance structure to set strategic priorities and drive decision making to bring alignment between the learning function and organization
Learning Planning	Establish Business Measurement/Analytics	Use a data-driven approach to measure and evaluate the effectiveness of learning. Develop measurement and analytic tools and templates
Learning Design & Development	Learning Design, Development and Management Tools	Develop a standard suite of templates, process and tools to design, develop, maintain, deliver and evaluate training materials

Process	Tasks	Definition
Learning Design & Development	**Content Strategy, Content Development and Maintenance**	Develop curriculum by determining the appropriate training courses, including objectives and topics. Develop appropriate modularized training content using technology as appropriate to develop
Learning Delivery	**Delivery Planning and Execution**	Use a standardized, blended training delivery approach that integrates formal training (classroom, eLearning, mobile learning, virtual Instructor-Led Training (ILT)) and informal training (on-the-job coaching, knowledge sharing, collaboration) to enable employees to acquire the necessary skills to perform their job functions
Learning Administration	**Administer and Track Learning**	Use a centralized Learning Management System to manage the administration, documentation, completion tracking, and reporting on progress and performance on all training programs including online, classroom, and virtual ILT courses
Learning Administration	**Measure Effectiveness of Training**	Use a standardized process to administer evaluations to measure the extent of learning objectives back on the job and the business impacts/effects of training

Training Maturity Model

The purpose of a maturity model is to describe success factors at various levels of maturity, or scales of mastery, as an organization develops. Critical success factors describe the attributes that an organization needs to successfully meet its goals. For each success factor, the maturity model will list descriptions at various maturity levels (Emerging, Basic, Advanced, High Performance). The maturity model below lists success factors that relate specifically to training.

Using the methodology provided in the maturity model section, organizations should examine their current training environment to determine where they are in the maturity model and implement strategies, as needed, to advance in the model. Additionally we've included Maturity Assessments in the Appendix to help organizations determine their training maturity level

Table 11. Maturity Model – Training

Process	Emerging (1)	Basic (2)	Advanced (3)	High Performance (4)
Establish Learning Governance	Lack of learning governance Learning not aligned with business priorities	Various groups participate in decisions regarding learning – ad hoc, on an initiative by initiative basis	Business priorities are considered in most learning planning processes	Strong linkage between learning and business priorities
Design and Development Tools	Limited design and development tools or processes	Various design and development processes and tools	Common learning design and development processes and tools exist across the organization	Common learning design and development processes and tools exist– some integration between design and development
Deliver Training	Mostly ILT delivery which is of inconsistent quality	ILT and some eLearning delivery	ILT, rudimentary and medium fidelity eLearning and virtual classroom environments comprise delivery suite	ILT, eLearning (basic and high-fidelity) and virtual classroom environments comprise delivery suite
Administer and Track Learning	Limited administrative capabilities to schedule, track and report on learning – not supported by technology	Manual and time intensive administrative capabilities that schedule, track and report on learning	Learning events are scheduled, tracked and reported on using various administration and tracking technologies	Learning events are scheduled, tracked and reported on using a central administration and tracking tool
Evaluate employee course completion	Impact of learning not measured	Ad hoc measurement of the impact of learning	Consistent tracking of basic learning measurement data – trainee reactions and test scores	All levels of learning impact are measured – from trainee reaction to return on investment
Certify Job Readiness	Job readiness not certified	Inconsistent job readiness certification	Consistent certification of job readiness throughout organization	Certification at all levels throughout training program

Training Needs Assessment

A key requirement in the development of an effective Impact Sourcing training program is the assessment of employee training needs. A high level needs analysis was conducted of various Impact Sourcing organizations. The findings of this analysis produced a preliminary list of roles and guided the development of the training curriculum. Four high-level outsourcing jobs/role types were identified:

1. Data Management
2. Human Resources
3. Information Technology Specialists
4. Customer Service

The table displays BPO services by function and role and includes the tasks needed to successfully achieve the role objectives:

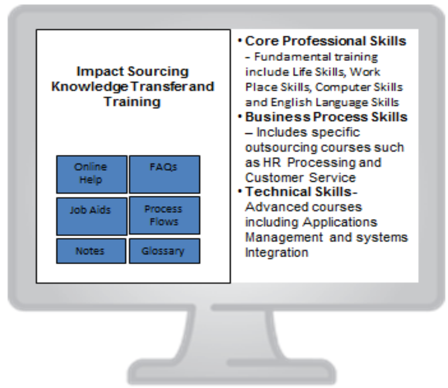
Table 12. BPO Functions and Roles

Data Management (Administrative and Transactional)	
Digitization Processor	Capture digital images of documents, enter data into spread sheets and other software
Image Tagging Processor	Perform task to index and manage multiple images. Scan imaging reports and update flow sheets with relevant data
Transcription Specialist	Responsible for transcribing information in order to document content. Transcribe from audio files and printed documents and manuscripts
Data Processor/Entry	Provide transactional services of data entry; ensure data entry accuracy by following client process/ methodology. Key and sort electronic information
Researcher	Research and create content from inquiries generated by customers
Human Resources	
HR Support Specialist	Responsible for providing Human Resources and Professional Development administrative support that includes employee data management and reporting and handling special requests
Information Technology Specialists	
IT Help Desk Support	Assist users in troubleshooting computer issues
Application Development/Maintenance	Implement, develop, document and maintain applications
Web Designer	Design and develop web page
Network Administrator	Responsible for configuration, installation and maintenance of IT infrastructure. Ensure that the IT infrastructure is supported and maintained to satisfactory levels of service. Maintain and support network operations
Customer Service	
Call Center Representative/ Customer Support	Provide support to customers through various forms of interaction that includes telephone, email, chat, or fax
Accounts Payable	Perform Accounts Payable tasks based on a general overview of Accounting services area such as reconciliation of General Ledger, close financial books at period-end, and/or prepare financial reports. Pay and enter invoices
Billing Specialist	Responsible for maintaining billing activities. Ensure that the necessary guidelines are complied with and necessary documents are maintained for all day-to-day activities

Training Curriculum Structure

Training is not a one-time event. The Impact Sourcing Curriculum moves employees from general knowledge to specific role based knowledge while providing hands-on practice. The curriculum creates employee awareness by starting at the "big picture" level and increasingly becoming more detailed and specific to each Impact Sourcing role.

Figure 11. Training Website



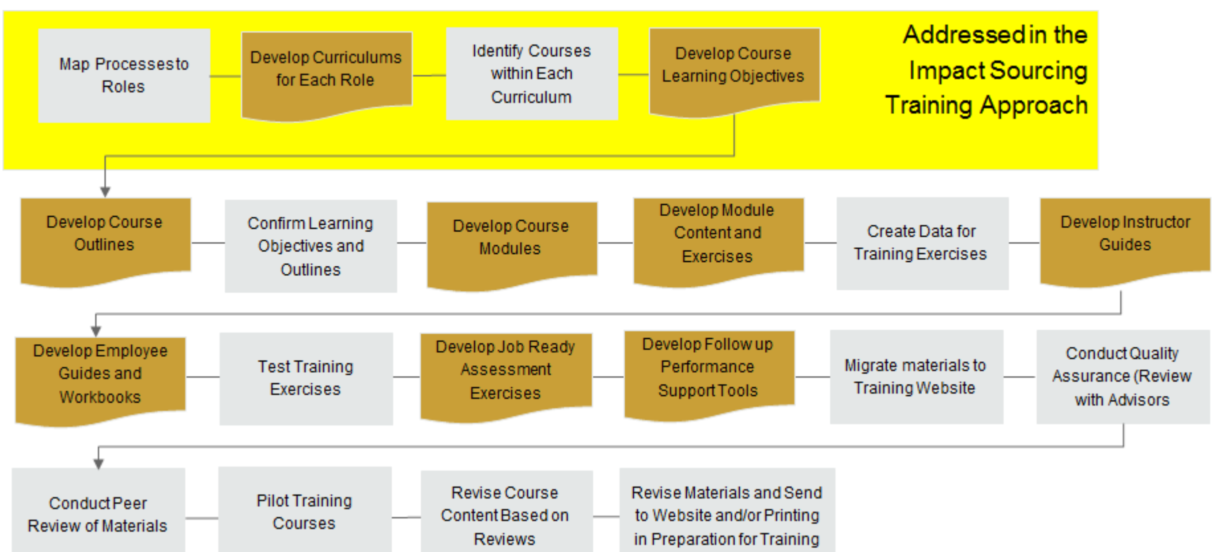
The Impact SourcingTraining Website establishes a single source for all training related information

The curriculum was developed based on interviews, surveys and leading practices provided by Impact Sourcing and training organizations including, Anudip, Nairobits, Digital Divide Data, Dr. Reddy's Foundation, Techno Brain, and the Maharishi Institute.

The Impact Sourcing Curriculum includes instructor-led training (ILT), self-study eLearning, hands-on transaction training, simulation exercises, and job readiness demonstrations at the completion of each employee's curriculum. A training website is suggested to facilitate the learning by providing a holistic view of the curriculum and serve as the single source for all training materials and support tools on a 24/7 basis.

Curriculum development is one step of the training development process illustrated below. The Training Approach highlighted in this paper only addresses a portion of the process.

Figure 12. Training Development Process



The Impact Sourcing Curriculum was developed based on the training needs assessment for each role in the form of Learning Paths. Learning Paths are prescriptive to each role so that they get the right information to be successful on their jobs. Learning Paths for the following Impact Sourcing roles have been developed based on the interviews and vary depending on the job function:

- Digitization Processor
- Image Tagging Processor
- Transcription Specialist
- Data Processor/Entry
- Researcher
- HR Support Specialist

- IT Help Desk Support
- Applications Development/Maintenance
- Web Designer
- Network Administrator
- Call Center Representative/ Customer Support
- Accounts Payable
- Billing Specialist

Each individual, based on role, would be required to demonstrate knowledge and mastery for topics in their specific Learning Path. Individuals may have varying levels of knowledge prior to taking the course, and individuals with advanced levels of knowledge can opt to take the course assessment prior to taking the training course. If the individual achieves a passing grade, they can opt out of the training.

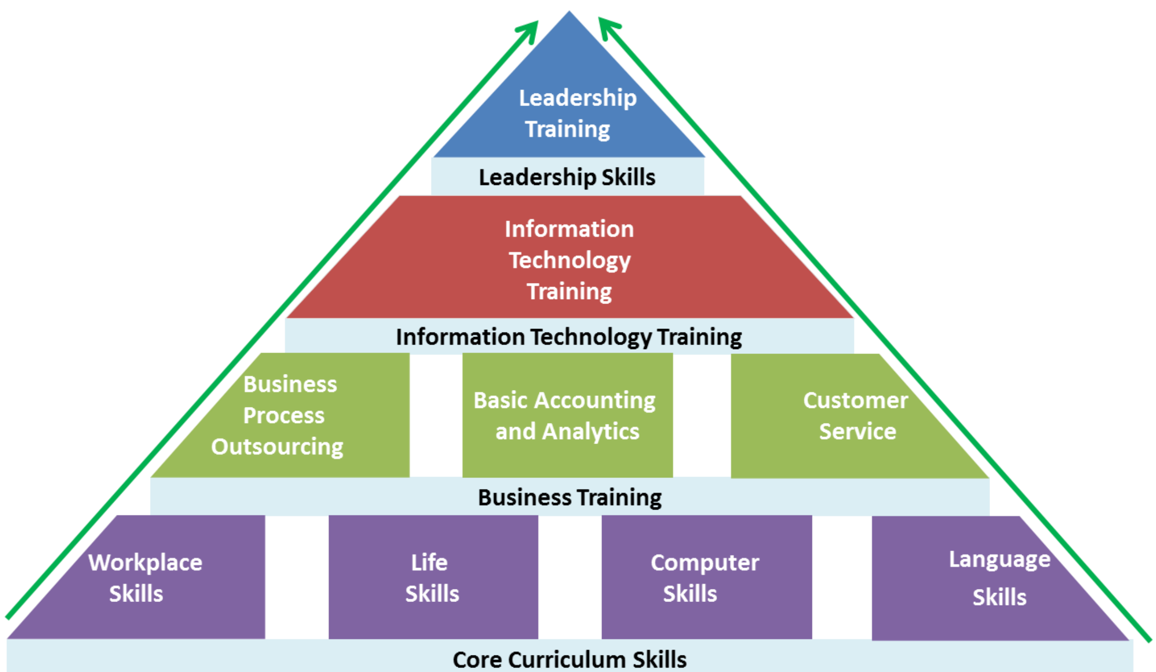
Learning Paths can be found in the Appendix.

The curriculum includes the training courses and the training modules that make up each course. Learning objectives for each training module are identified along with the evaluation process to determine training effectiveness. The employee is assessed to ensure that they have achieved the objectives of each course.

Structure of Impact Sourcing Curriculum

The Curriculum contains four levels of training – Core Curriculum Skills, Business Training, Information Technology Training and Leadership Skills. Each training level is comprised of a set of courses for each role. Employees are provided Learning Paths that offer a progressive learning approach that drives them to proficiency faster. The Impact Sourcing Curriculum is comprised of the following nine high level areas:

Figure 13. Impact Sourcing Curriculum



Life Skills

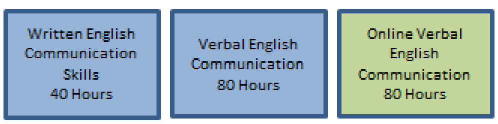
Life Skills training is the introductory training that orients new employees and is recommended for all functional, technical and administrative roles. Teaching life skills to everyone encourages employees to open up and reduces the barriers between themselves.

Figure 14. Impact Sourcing Curriculum – Life Skills (28.75 hours)

Language Skills

Language Skills training includes verbal and written communication. It also includes English language skills for those individuals that require additional language skills.

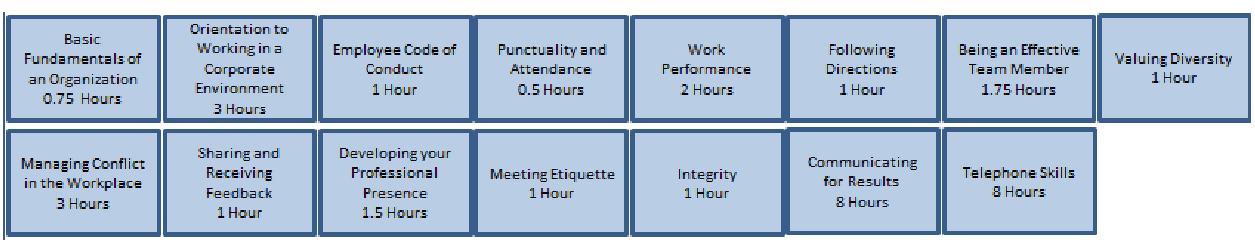
Figure 15. Impact Sourcing Curriculum – Language Skills (200 hours)



Workplace Skills

Workplace Skills training orients individuals into a working environment. It includes basic office environment training, organizational training, diversity training and business skills.

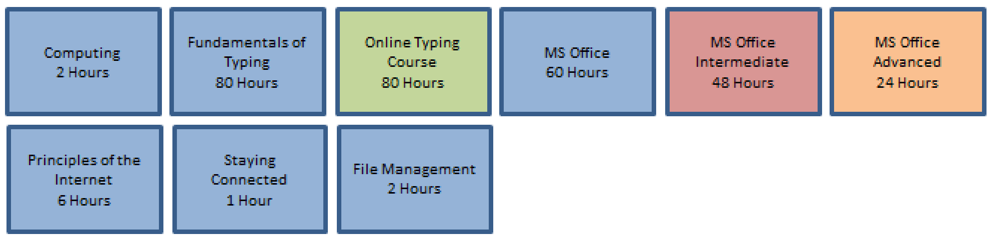
Figure 16. Impact Sourcing Curriculum – Workplace Skills (34.5 hours)



Computer Skills

Computer Skills training is introductory training on how to use a computer and is recommended for all functional, technical and administrative roles. It provides an overview of working on a computer and entry level MS Office training.

Figure 17. Impact Sourcing Curriculum – Computer Skills (303 hours)



Business Process Training

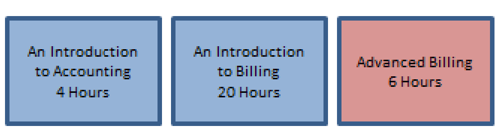
Foundational Business Process Training includes Business Process Outsourcing courses. These courses illustrate the flow and structure of the processes as well as key concepts for employees, who should only take training that is appropriate for their work discipline. The training delivery methods consist of On the Job training, Role-Play, Application Simulation, and Instructor-led training.

Figure 18. Impact Sourcing Curriculum – Business Process Training (39 hours)

Basic Accounting and Analytical Training

Basic Accounting and Analytical Training includes accounting courses. These courses provides the analytical and foundation training as well as key concepts for employees, who should only take training that is appropriate for their work discipline. The training delivery methods consist of On the Job training, Role-Play, Application Simulation, and Instructor-led training.

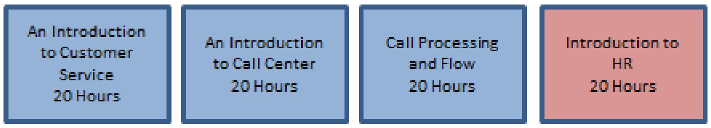
Figure 19. Impact Sourcing Curriculum - Basic Accounting and Analytical Training (30 hours)



Customer Service Training

Customer Service Training includes Call Center courses. These courses illustrate the flow and structure of the processes as well as key concepts for employees, who should only take training that is appropriate for their work discipline. The training delivery methods consist of On the Job training, Role-Play, Application Simulation, and Instructor-led training.

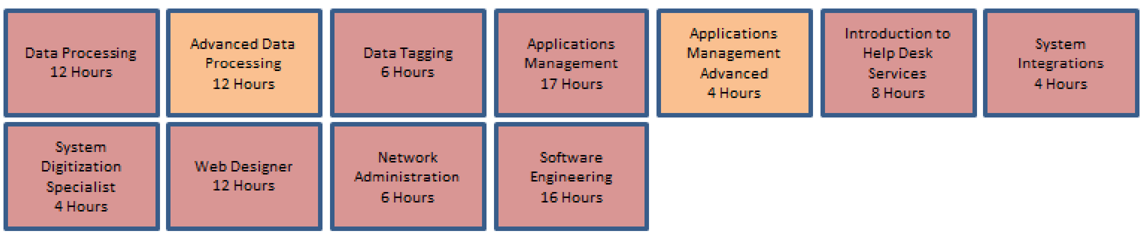
Figure 20. Impact Sourcing Curriculum – Customer Service Training (80 hours)



Information Technology Training

ITO Training is advanced technical training that includes courses such as Applications Management, Systems Integration and Network Administration. Only technical employees are required to take these courses. The training delivery methods consist of On-the-Job Training, Role-Play, Application Simulation and Instructor-led training.

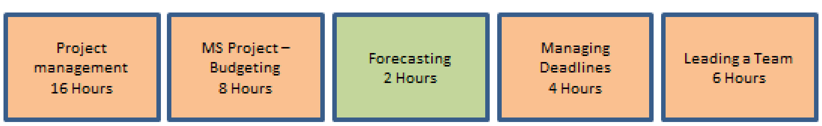
Figure 21. Impact Sourcing Curriculum – Information Technology Training (89 hours)



Leadership Development Training

Leadership Development training is specifically designed for those individuals that are in a team lead or supervisor role.

Figure 22. Impact Sourcing Curriculum – Leadership Development Training (36 hours)



The comprehensive Impact Sourcing Curriculum including course hours, audience and delivery methods can be found in the Appendix.

Training Course Structure

Training courses are a series of lessons that teach the skills and knowledge for a particular job or activity. Each training course includes a list of Topics, Learning Objectives, Delivery Methods, Course Hours and Training Audience.

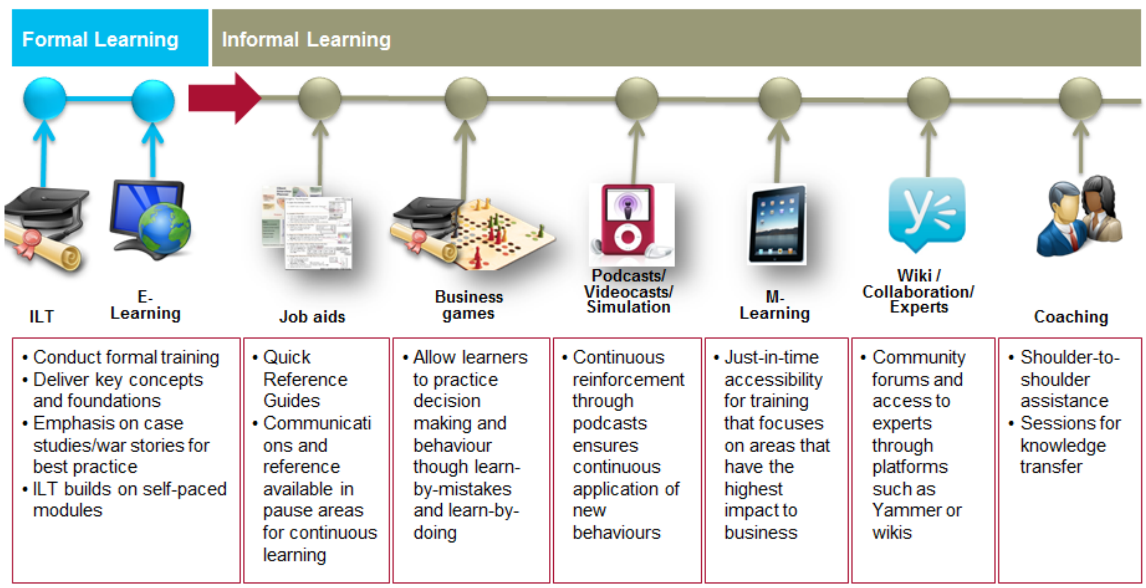
- **Topics:** Topics are the course content. It includes the subject material and associated tasks

- **Learning Objective:** Learning Objectives describe what trainees learn and understand after they complete each course; usually a culminating activity, product, or demonstrated performance that can be measured
- **Course Hours:** Course hours indicate the intended length of time to complete the course, including assessments and evaluations
- **Training Audience:** Training Audience is the intended trainee for the course

Training Delivery Methods

Blended learning methodologies ensure that learning is more effective. Blended learning combines a variety of training delivery (e.g., Instructor-led, eLearning, Coaching) to form an integrated training approach. The figure below illustrates the different training delivery options an Impact Sourcing organization may consider to include in their training approach.

Figure 23. Training Delivery Methods



Source: Accenture Training Delivery Methods, 2013

Formal learning, which is depicted on the left side of the figure, provides a structured program where courses are delivered through a traditional classroom or eLearning format. Informal learning, which is depicted on the right side of the figure, provides more flexibility in the way course content is created and deployed. As the training courses are developed, it is suggested to leverage informal learning which enables trainees to maximize the time spent on applying learning directly to the job.

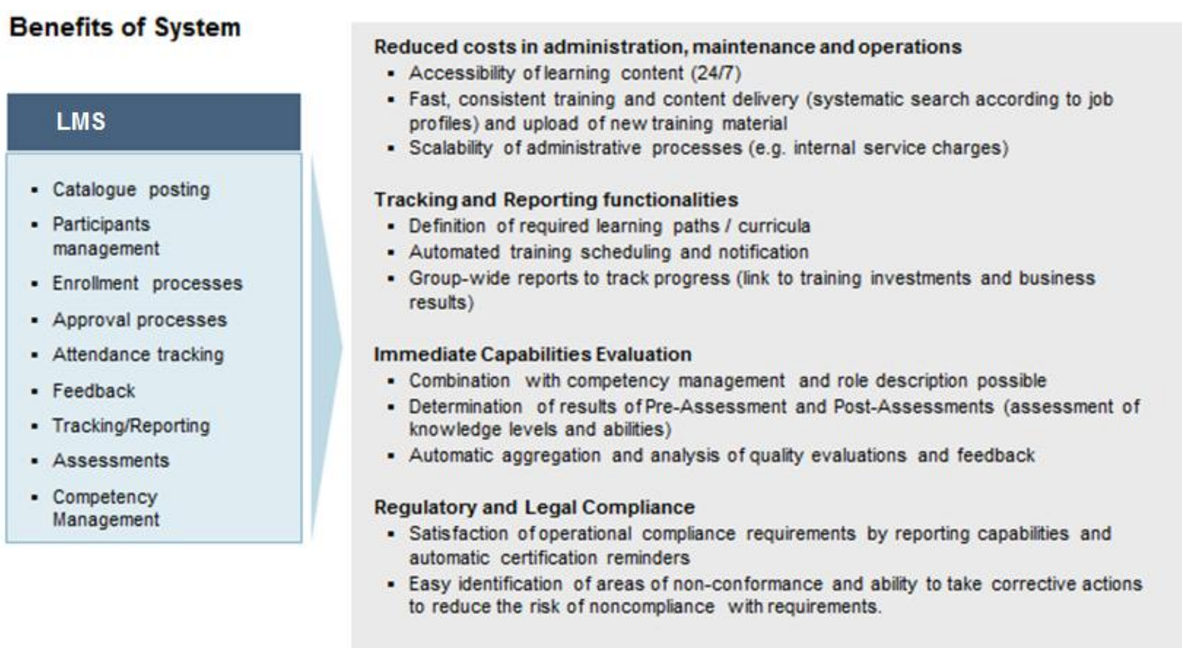
Through our research, we found that many Impact Sourcing organizations deliver training through traditional instructor-led classroom methods, due to the smaller number of employees, limited internet connectivity / bandwidth, or absence of a Learning Management System.
However, as Impact Sourcing continues to grow and developing countries realize greater access to bandwidth, ISSPs and their partners will need to embrace a higher percentage of training delivery via eLearning methods in order to transfer knowledge to employees in a rapid fashion, further scale, and ultimately remain cost competitive. ELearning can be more efficient than instructor-led instruction because eLearning can take anywhere from 25 to 60 percent less time to convey the same amount of instruction or

information as in a classroom (Rosenberg, 2001). Of course, ensuring an economy of scale is important here, as developing an online course for only a few learners would not be cost effective.
But overall, web-based eLearning training on the same content can offer a less expensive and more efficient alternative because the training can be more accessible and more staff can be trained, in an anytime/anywhere fashion, once the training is developed.

Learning Management System

As Impact Sourcing providers grow and mature, and as access to technology and increased bandwidth becomes more pervasive in the developing countries in which these organizations operate, there will be increased need, and opportunity, to leverage eLearning modules, which can help provide high-quality training in a self-service, self-paced, "continuous" manner.

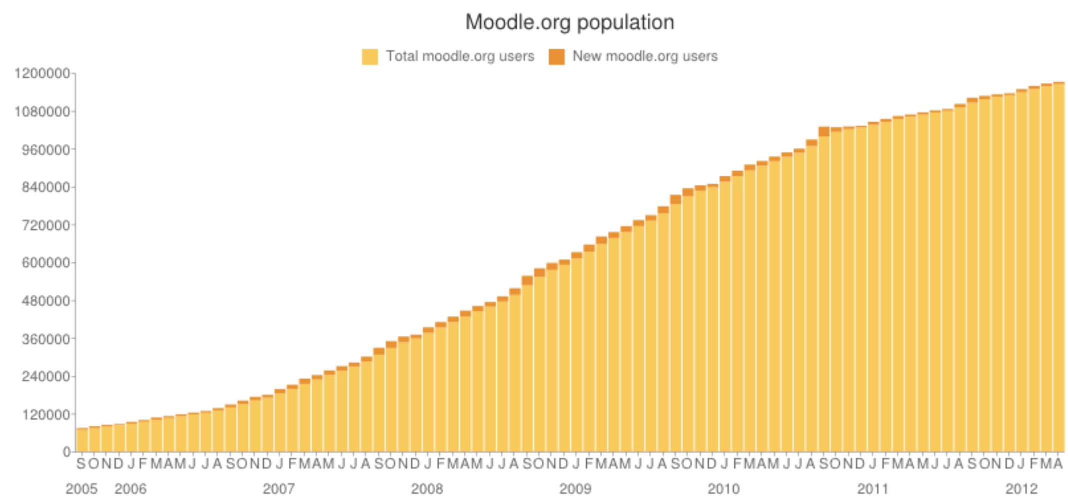
An online Learning Management System (LMS) is a critical tool in administering eLearning, essentially serving as an employee's one-stop shop for access to web-based content. While one key function of an LMS is to provide access to, and tracking progress and completion of, eLearning modules, an LMS also serves as an organization's administrative tool for its entire training program. An LMS can be used for scheduling and tracking all learning activities (including instructor-led courses, eLearning modules, podcasts, video-casts, and other virtual training), housing exams and results, and reporting.



Based on interviews and surveys, ISSPs are not consistently leveraging LMS technologies for their learning administration needs. Several use in-house developed databases. And one organization uses People-Trak (http://www.people-trak.com/hr_functionality.asp?subid=tm).

With the growth of newer LMS systems, such as Moodle (a free-source LMS platform), we expect that ISSPs will explore the feasibility for leveraging these systems as their employee bases grow.

Figure 24, Total Moodle Users



http://www.freemoodle.org/mod/lesson/view.php?id=6171&pageid=812

There are several characteristics that an organization should consider when deciding which system to implement:

Table 13. Learning Management System Characteristics

Characteristics of a Learning Administration and Tracking System
Administration capabilities – Manages information pertaining to trainees, courses and instructors. It should have provisions for controlling system access privileges. Not all users should be able to access all the features. An effective LMS must also enable the instructors to check the progress of the trainees.
Authoring tools – Assists the instructors in developing courses easily. The tools should have provisions for adding pictures, videos and navigation buttons. The tools should also enable the instructors to create different kinds of evaluation tests to assess the learning.
Communication facilities – Enables trainees to communicate with others within the system. Most LMS' offer messaging and notification systems. Communication facilities like chat rooms, e-mail provisions, bulletin boards and forums, all help trainees create a virtual learning space and a community to connect with each other and enrich their learning experience.
Media support – Supports various multimedia file formats such as Flash, Shockwave, mp3, and Rich Text. This engages trainees by enabling different components to be part of the curriculum.
Interactive learning environment – Trainees using the LMS will want more interactive courses. Features such as clicking on a text to obtain extra information or selecting answers from a pull down list engage the trainees and enhance the learning process.

Learning Management System Vendors

The following vendors provide Learning and Administration Tracking functionalities:

- **Moodle** is the largest free source e-learning software platform. As of October 2012, it had a user base of 70,793 registered and verified sites, serving 63,204,814 users in 6.7+ million courses with 1.2+ million teachers.
- **Blackboard** solutions use technology to reach more trainees in immediate, personalized ways. They have access to publishers' rich digital content and much more in a single location.
- **Sakai** is a community that exists to enhance teaching, learning, and research. The global community comes together to define needs of academic users, create software tools, share best practices and pool knowledge and resources in support of this goal.
- **People-Trak** (used by a U.S.-based ISSP) works in conjunction with Personnel Management to track detailed information about internal and external training programs.
- **Skillsoft** is a cloud-based solution that enables formal, informal and collaborative learning. Primarily known for their large library of eLearning content, they also provide an LMS solution.
- **Oracle (iLearning)** is an enterprise learning management system that lets organizations manage, deliver, and track training participation in online or classroom-based environments.
- **Saba** provides full suite of capabilities from talent management to learning management to content management. It also has its own virtual ILT tool in-built.
- **CornerStone OnDemand** is a modular and flexible system. It is not a large a player and has limited capability of its own in the source content management area. It partners and integrates with other 3rd party content authoring tools such as Claro or Composica to add authoring/CMS support.
- **Plateau** is a comparable system and falls slightly behind Cornerstone on learning management functionality. It has strong learning and talent management capability. Plateau does not have in-built learning content authoring capability.

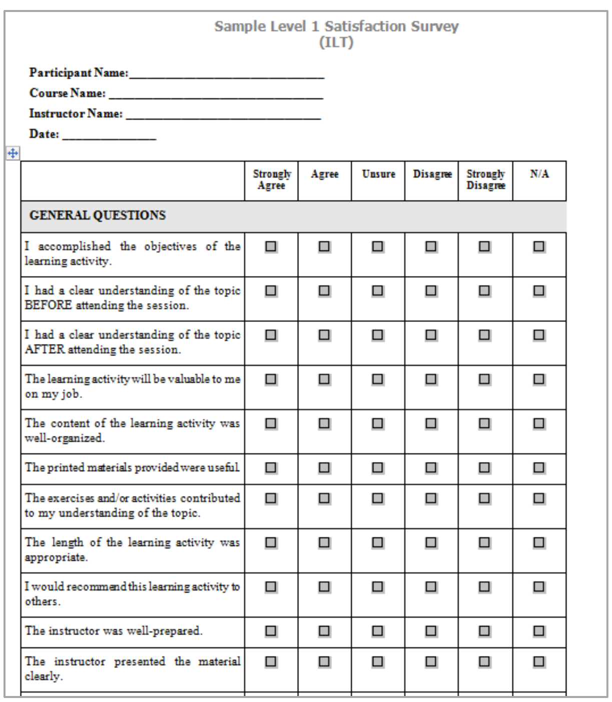
Training Evaluation

In order to scale efficiently and respond to the focused needs of poor and vulnerable workers, organizations involved in Impact Sourcing should continuously evaluate and determine the impact of their training. This can be accomplished by gathering and analyzing key training-related data points through an industry-standard framework.

We recommend using Kirkpatrick Levels of Training Evaluation to progress Impact Sourcing organizations through the Training Maturity Model. Kirkpatrick's four levels are designed as a sequence of ways to evaluate training programs. This evaluation model is based on the sound principles in the Kirkpatrick Model created by Dr. Don Kirkpatrick in the 1950s.[15]

Level	Measurement Focus	Questions Addressed
1 – Reaction	Trainees's perceptions	What did trainees think of this training?
2 – Learning	Knowledge/skills gained	Was there an increase in knowledge or skill level?
3 – Behavior	Worksite implementation	Is new knowledge/skill being used on the job?
4 – Results	Impact on organization	What effect did the training have on the organization?

Below is a sample snip of a Level 1 survey that can be used to gather participant feedback on an instructor-led course. This sample has been included in the Appendix and can be easily modified for web-based/eLearning activities as well.


Sample Level 1 Satisfaction Survey
(ILT)

Participant Name:____________________
Course Name: ____________________
Instructor Name: ____________________
Date: ____________

	Strongly Agree	Agree	Unsure	Disagree	Strongly Disagree	N/A
GENERAL QUESTIONS						
I accomplished the objectives of the learning activity.	☐	☐	☐	☐	☐	☐
I had a clear understanding of the topic BEFORE attending the session.	☐	☐	☐	☐	☐	☐
I had a clear understanding of the topic AFTER attending the session.	☐	☐	☐	☐	☐	☐
The learning activity will be valuable to me on my job.	☐	☐	☐	☐	☐	☐
The content of the learning activity was well-organized.	☐	☐	☐	☐	☐	☐
The printed materials provided were useful.	☐	☐	☐	☐	☐	☐
The exercises and/or activities contributed to my understanding of the topic.	☐	☐	☐	☐	☐	☐
The length of the learning activity was appropriate.	☐	☐	☐	☐	☐	☐
I would recommend this learning activity to others.	☐	☐	☐	☐	☐	☐
The instructor was well-prepared.	☐	☐	☐	☐	☐	☐
The instructor presented the material clearly.	☐	☐	☐	☐	☐	☐

Figure 25. Sample Level 1 Survey

As organizations proceed through each of the levels, the evaluation process becomes more difficult, requiring more time and effort. However, most organizations conduct Level 1 evaluations at a minimum. It is vital that Impact Sourcing organizations conduct at least Level 1 and Level 2 evaluations at the completion of all training activities. Organizations need to determine if employees know how to do their job upon completing training. There is a business impact in ensuring that employees are performing at the right level for their jobs by increasing client satisfaction in ensuring service level agreements (SLAs) are met (e.g., call handling time, data entry output). Meeting SLAs for clients by employing disadvantaged individuals may lead to additional Impact Sourcing work by the client and help scale the industry.

[15] Kirkpatrick Partners. 2013. April 8, 2013. www.kirkpatrickpartners.com/OurPhilosophy/tabid/66/Default.aspx

Impact Measurement

Background

Today, companies are realizing more than ever the importance of making positive impacts to society through their day-to-day business operations and corporate social responsibility initiatives. While society and corporations have always had impacts on one another, never before has such particular attention been given to ensure these impacts are positive and mutually beneficial. Impact Sourcing is a great example of this symbiotic relationship in how it benefits disadvantaged individuals in low employment areas and also offers a low cost alternative for outsourcing solutions for businesses. This Shared Value concept introduced by Michael E. Porter and Mark R. Kramer asserts that tremendous opportunities for innovation and growth exist in tackling social problems as core business objectives.[16]

As organizations begin to prioritize the pursuit of Shared Value, measuring the return on investment of such initiatives will become equally as important. First, it helps determine how well you are achieving your Shared Value objectives and will help you plan more effectively. Second, measuring and communicating the value of your social outcomes helps to demonstrate the importance of your work to your organization, your donors, partners and general public. It would be ineffective to set targets or commit to outcomes if one could not track progress towards those goals. Therefore, organizations need an approach for measuring impact of social initiatives and a way to quantify the changes that occur to individuals, families, and communities as a result of their efforts. The action of measuring impact is one clear distinction between Impact Sourcing organizations and traditional outsourcing organizations today.

What is Impact Measurement?

When it comes to measuring impact, there are many definitions in the development sector. INTRAC, an international NGO training and research center, defines impact assessment as *the systematic analysis of lasting or significant change –positive or negative, intended or not – in people's lives brought about by an action or a series of actions* . Another definition in the Double Bottom Line Project Report by Clark, William Rosenzweig, David Long and Sara Olsen states *the portion of the total outcome that happened as a result of the activity of the venture, above and beyond what would have happened anyway.* The key understanding is that Impact Measurement involves assessing the *change* that results from action.

Impact Measurement responsibilities generally fall under the Monitoring and Evaluation (M&E) function for most non-profit or non-governmental organizations. The purpose of the Monitoring and Evaluation function is to monitor programs, evaluate impact on specific target populations, and assess success and gaps in program implementations. For private organizations, the reporting or analytics functions in a project management office typically serve this purpose but with a different focus; increasing the bottom line versus positive social impact.

Why Measure Impact?

There are several reasons why an organization should measure impact. According to Porter and Kramer, "companies cannot know the extent to which they are creating shared value if they do not measure their

[16] *Strategy & Society: The Link Between Competitive Advantage and Corporate Social Responsibility*. Harvard Business Review. 2006

progress on social objectives." In addition to assessing progress on objectives, the table below lists four primary purposes for measuring impact[17]:

Table 14. Purpose for Measuring Impact

Accountability	Demonstrate success (to yourself, donors, partners, general public) to justify funds received and to solicit further funding
Learning	Understand how your efforts impact communities in order to improve the effectives of interventions and make a more significant difference in people's lives
Inclusion	Be accountable to the people for whom you are working. Collaborate with them to understand the changes they want to make and then to analyze progress against those changes
Advocacy	Use findings obtained from the impact assessments to advocate for changes in behavior, attitudes, policy and legislation at all levels

Impact Measurement should be a priority for any company with objectives to impact society and drive change to a target population. It provides the ability to establish accountability with stakeholders, fosters a collaborate environment for improving operations, and serves as an advocate for change based on the results discovered through Impact Measurement. For organizations providing outsourcing employment opportunities to underprivileged individuals, harnessing this capability is an opportunity to understand the changes they are driving to the target population and to increase the positive effect of those changes.

Considerations for Traditional Outsourcing Organizations

We looked at 5 of the top 10 traditional outsourcing companies listed in International Association of Outsourcing Professional's 2012 Global Outsourcing 100 to identify some of the key impact measures.

	Accenture[18]	Infosys[19]	Wipro[20]	Capgemini[21]	CSC[22]
Publish CSR Report?	Yes	Yes	Yes	Yes	Yes
Key Focus Areas	• Skills to Succeed • Environment • Our People • Supply Chain	• Social Contract • Resource intensity • Green Innovation	• Employees and sustainability at the workplace • Ecological sustainability • Customer stewardship • Sustainability and the responsible investor • Ethical supply chain • Education & community care • Advocacy and public policy	• Leadership, Values & Ethics • Our People • Clients • Communities • Suppliers & Business Partners • The Environment	• Clients • Environment • Community • Governance • Employees
Key Measurements	**Skills to Succeed** • Contribution by region, type ($) • Training spend ($) • People Equipped with Skills to Get a Job or Build a Business • Total Accenture and	**Social Contract** • Employee distribution across location, role, gender and age group (#) • Employee concerns and grievances (#) • Employee issues –	**Employees and sustainability at the workplace** • Employee count – by seniority, geography and age group • New hires – gender wise, level wise split • Employee attrition – by	**Our People** • Headcount by country or region • Breakdown of headcount by age **Suppliers & Business Partners** • Total Global	**Environment** • Energy efficiency • opportunities documented • reduction in global business • travel and transportation

[17] Impact Assessment: Understanding and assessing our contributions to change
[18] http://www.accenture.com/Microsites/corporate-citizenship-report-2012/Pages/index.aspx
[19] http://www.infosys.com/sustainability/Documents/infosys-sustainability-report-2011-12.pdf
[20] http://www.wipro.com/Documents/FINAL_Sustainability_Report_IT_270312_6mb.pdf
[21] http://www.capgemini.com/about/corporate-responsibility/capgeminis-commitment-to-csr
[22] http://assets1.csc.com/cr/downloads/CRReport2012_full.pdf

	Accenture Foundations Contributions ($) • Hours of Participation in Accenture-sponsored "Time & Skills" Programs **Environment** • Total Carbon Emissions • Energy Usage **Our People** • Total Training Spend • Training Hours per Employee • Employee Donations • Women in Workforce • Women New Hires • Women Senior Executives **Supply Chain** • Total Diverse Procurement Spend	Company action (#) • Employees trained (#) • Participation in person days (#) • Grants ($) **Resource Intensity** • Water Savings • Electricity Savings • Reduction in Carbon Emissions • Energy Consumed • Hazardous and Non-Hazardous waste disposed • Building energy data **Green Innovation** • Carbon emission costs	geography and age group • Resolution of ombuds process complaints • Safety incidents • Average number of days of training - Gender wise and Level wise **Ecological sustainability** • Total GHG emissions • Energy Consumption • Direct and Indirect energy • Electricity savings • Water Withdrawal by Source • Air Emissions in Tons • Ozone Depleting Substance • Waste by Category • Environmental Expenditures **Customer stewardship** • E-waste collection	Procurement spend	• Data center energy savings • GHG Emissions **Community** • Funds raised ($) • Blood Unit Donations **Governance** • Board meeting • Director attendance **Employees** • Social media participants • Collaboration activities • Sites, threads, blogs (#) • Global Get Fit Challenge • Participants • steps averaged • by the top participant
CSR Reporting Standard(s)[23]	• Global Reporting Initiative • United Nations Global Compact	• Global Reporting Initiative • United Nations Global Compact • Universal declaration of human rights	• Global Reporting Initiative • United Nations Global compact • Universal declaration of human rights • Millennium development goals • ILO • OECD	• United Nations Global Compact • Universal declaration of human rights	• Global Reporting Initiative

Research indicates that each company considers CSR initiatives a priority in their overall strategic agenda. The initiatives comprise mostly of Environmental, Supply Chain, and People components. Inclusion and Diversity is a common trend among the People CSR component for all 5 companies, and it relates directly to the concept of Impact Sourcing. Because companies see value in hiring and retaining diverse individuals, Impact Sourcing can help accomplish the CSR goals set for providing employment opportunities to diverse or underprivileged individuals.

Furthermore, since most of these companies incorporate Inclusion and Diversity as part of their annual CSR reports, they should consider Impact Sourcing Impact Measurement as the next step for their existing CSR reporting capabilities. By moving to this next level of CSR reporting, the organizations can begin to quantify the benefits of their CSR-invested dollars on employed individuals, families, and communities instead of simply reporting demographical information.

Findings

Our team gathered information from numerous sources for input in developing a recommended approach for Impact Measurement. These sources included desk-based research, face-to-face interviews, and online surveys.

The Impact Measurement approach addresses the following issues that were reported by Impact Sourcing organizations through interviews and surveys:

[23] *Annual Report on the OECD Guidelines for Multinational Enterprises 2008 Employment and Industrial Relations*. 2009. OECD

Key Impact Measurement Issues

- Limited use of industry standard frameworks or tools
- Use of manual and out-dated processes to collect data (e.g., paper forms)
- Limited number of metrics identified or used to analyze the impacts of Impact Sourcing engagements
- Monitoring impact to employees after they leave the organization (alumni progress)

Recommendations for ISSPs

- Leverage a Logical Framework to define strategic drivers and desired impacts to measure
- Select indicators (metrics) that align to desired outputs and impacts (e.g., alumni progress, impact to employee families)
- Track indicators in a Balanced Scorecard through efficient data collection processes, automated where possible

Recommendations for Traditional Outsourcing Providers

- Enhance CSR reporting by including Impact Sourcing indicators (metrics)
- Analyze the livelihood changes being made to target populations, in addition to measuring traditional demographic data (e.g., number of hires)
- Collaborate with Impact Sourcing community to share best practices in data collection processes and industry standard frameworks/tools

The following sections will outline the research findings for Impact Measurement.

Findings: Desk-based Research

Research showed that a one-size-fits-all Impact Measurement approach does not exist today. Although we found numerous techniques and methods available for measuring social, economic, or environmental impact, there seemed to be no universally accepted or applied Impact Measurement approach, tool, or methodology. Perhaps this variance is rooted in the need to customize an Impact Measurement approach to the objectives and environments of each organization. A previous study done in 2008 by Social Venture Technology Group with support from the Rockefeller Foundation called Impact Measurement Approaches: Recommendations to Impact Investors aimed to provide the Rockefeller Impact Investment Collaborative (RIIC) with an understanding of what methods existed at the time for identifying and measuring impact. This study alone outlined twenty-three different Impact Measurement approaches that varied in methodology, cost, customization, and popularity.[24]

Next, we found the recurrence of the Logical Framework in various Impact Measurement approaches from multiple sources. Numerous publications describe the Logical Framework as the foundation for measuring social impact and important for any type of work in the development community. The Logical Framework is a management tool mainly used in the design, monitoring and evaluation of international development projects. It has been widely adopted since then because of its flexibility and adaptability to various projects and initiatives. It is a standard framework with common nomenclature that is easily understood across cultures, locations, and work environments.

Another recurring Impact Measurement tool found in research was the Balanced Scorecard, developed by New Profit Inc. in 1992 and revised in 2000 for Non-profit organizations[25]. The Balanced Scorecard is a "strategic planning and management system used extensively in business and industry, government, and nonprofit organizations worldwide to align business activities to the vision and strategy of the organization, improve internal and external communications, and monitor organization performance against strategic goals[26]."

Figure 26. Balanced Scorecard

Impact Sourcing Balanced Scorecard	
Cost Savings Objectives	*Growth Objectives*
• Reduced Labor costs • Reduced technology costs • Reduced Operations costs (business process efficiencies) • Reduced recruiting costs	• Geographic Expansion targets • Levels of access to new workforces • Resource flexibility
CSR Objectives	*Community Objectives*
• Effect of Impact Sourcing on the organization's CSR objectives • Impact on Employee Retention/Loyalty	• Direct Impacts: o Number of people employed (direct and indirect job creation) • Indirect Impacts o Number of people impacted (education, health) o Environmental Impact • ROI from re-investing funds back into the Community

[24] *Impact Measurement Approaches: Recommendations to Impact Inv*
[25] *Double Bottom Line Project Report: Assessing Social Impact in Doub*
and Olsen and the Rockefeller Foundation. 2004
[26] About the Balanced Scorecard. 2008. http://www.balancedscorecar
scorecard

The Impact Sourcing Feasibility Study completed in 2012 by Accenture with the support of Rockefeller Foundation highlighted the Balanced Scorecard as a method for measuring impact specifically for Impact Sourcing. The scorecard described in that study was developed based on an existing outsourcing scorecard that was extended to include Impact Sourcing aspects. In the diagram shown, the top two elements of the scorecard contain traditional outsourcing engagements measurements. The bottom two elements address other effects of Impact Sourcing that pertain to Corporate Social Responsibility objectives and Community Objectives.[27]

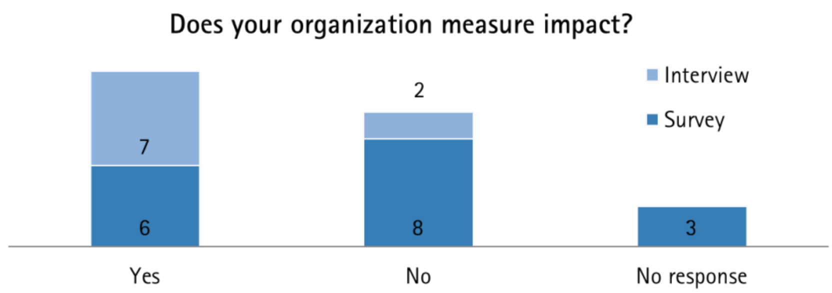
Some of the challenges identified through research for organizations pursuing Impact Measurement activities include the following[28]:

- No clear starting points from which to assess impact, including baseline data and indicators
- The design of the impact assessments is too complex; or it attempts to address too many needs
- Too many tools and processes to choose from; designers overly complicate the process and/or require staff and partners to work with tools that they are unfamiliar with
- Too difficult to determine a company's attribution when many partners are involved
- There is a danger that social measurement efforts could contribute to organizations "drowning in data."

Findings: Interview and Survey Research

First, we found that overall most organizations are measuring impact today, but the majority of the smaller organizations that represent the survey group are not.

Figure 27. Impact Measurement Analysis



Source: Accenture Analysis, Recruitment, Training, and Impact Sourcing Survey, 2013

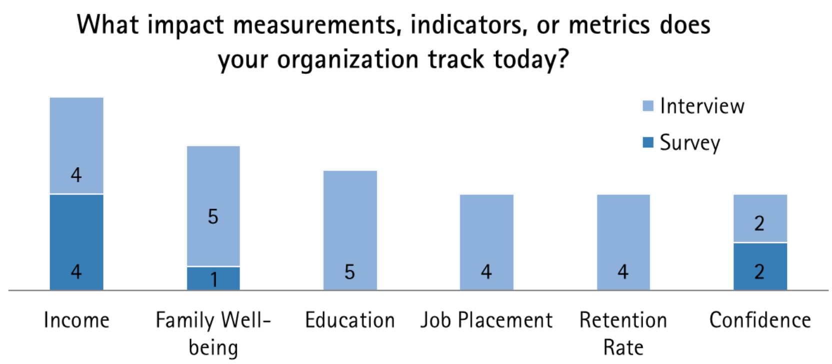
To elaborate on this finding, of the 13 organizations that measure impact, only 4 mention use of an industry framework or tool such as the Progress out of Poverty Index or Social Return on Investment framework. There are multiple benefits of using industry standard frameworks or tools. These benefits include time and cost savings, improved communication between your organization and stakeholders because of a common platform and use of terminology, and enhanced support from industry associations and backers of the framework who are constantly working to improve the materials. Even so, only a minority of the survey participants are leveraging such frameworks and tools.

Another point on this finding is that of the 10 organizations that do not measure impact, 8 specifically call out "impact on family and/or community" as desired measurements. This shows that despite the lack of Impact Measurement capabilities, there's an overwhelming desire to measure not just the immediate effects on the employed individual but also the effects on their families and extended communities.

[27] *Exploring the Value Proposition for Impact Sourcing.* Accenture. 2012
[28] *How to Unlock Value by Linking Social and Business Results.* FSG. 2011

The graphic below illustrates the most common areas of measurement mentioned by participants when asked what metrics your organization tracks today:

Figure 28. Types of Measurements Tracked

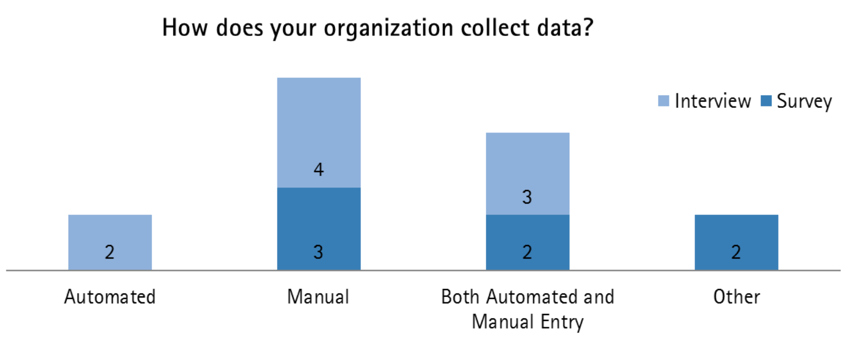


Source: Accenture Analysis, Recruitment, Training, and Impact Sourcing Survey, 2013

We found that most interview and survey participants provide these types of measurements in reports to donors, partners, and other stakeholders that indicate performance of the organization.

Another survey finding showed a trend in data collection methods. It indicated that few organizations gather data through purely automated methods and the majority of organizations rely on manual processes or a combination of both manual and automated processes to collect data.

Figure 29. Data Collection Methods



Source: Accenture Analysis, Recruitment, Training, and Impact Sourcing Survey, 2013

This finding is significant because we believe that organizations should strive to collect data through automated means when possible. Since very few of the total participants fit in this category, this reveals opportunity for improvement. We found that several organizations collect information on paper forms and conduct home visits to assess impact through interview and observation. Sometimes these home visits are conducted by a third party or partner organization operating in the field.

Next we found a stark difference in the proportion of organizations that monitor alumni progress between the interview and survey participants. The majority of interview participants continue to monitor progress of their employees after leaving the organization while the majority of survey participants do not monitor alumni progress.

Figure 30. Monitoring Alumni

Source: Accenture Analysis, Recruitment, Training, and Impact Sourcing Survey, 2013

This may suggest that sizeable, mature organizations are more likely to monitor alumni progress than smaller developing organizations. Perhaps this is because of a stronger alumni network program, or because of the availability of resources to dedicate to such activities that smaller organizations do not have. It's important to note that the changes that occur in a target population may span several years. Hence the importance of staying connected with the individuals post-employment. We found that organizations find it beneficial to share success stories of current or former employees as a recruitment or motivational tool.

Challenges reported by interview and survey participants for Impact Measurement include:

- Lack of Impact Measurement capabilities
- No formal Impact Measurement processes
- No dedicated resources for Impact Measurement
- No expertise or skills in-house for Impact Measurement
- No metrics identified
- Manual or time consuming data collection, analysis
- Rarely monitor employees after leaving or alumni network

Here are some direct quotes from survey participants regarding Impact Measurement:

- *"we don't have a formal process"*
- *"we don't have the resources to do this yet"*
- *"Impact Measurement is a great idea which we are yet to implement"*
- *"just started, excel based"*
- *"look forward to your guidance"*

Key Recommendations for ISSPs

A set of recommendations were developed based on survey findings to improve measurement practices for Impact Sourcing. There are a different set of recommendations for ISSPs because they already conduct some basic measurement of the impact to individuals due to donor obligations; whereas traditional BPOs have to enhance their existing corporate social responsibility measurement and reporting practices to recognize the impact to individuals and communities as part of their outsourcing operations.

Recommendation for ISSPs	Why This Is Important
Define strategic drivers. Using a Logical Framework or other industry approach, clearly define strategic drivers for your organizations and the desired outputs, outcomes, and impacts of your operations.	• Provides clarity on the motivations that influence an ISSP's purpose, mission, and strategy. • Serves as the basis for defining desired impacts (e.g., community impacts vs. business impacts, etc.)
Select indicators to track. Identify indicators that align with your desired outputs, outcomes, and impacts and track them in a Balanced Scorecard through efficient data collection processes by automating where possible and leveraging existing, relevant data sources.	• Provides clarity on the specific measurements that an ISSP would use to determine performance towards meeting goals for output, outcomes, and impacts. • Provides meaningful data for donors and other interested stakeholders.
Assess progress and determine corrective action. Analyze indicator data, continuously improve operations and processes through a structured approach such as the Lean Six Sigma DMAIC process, and collaborate with communities and partners to implement improvements and enable scalability.	• Assists the ISSPs, and relevant partners, in ultimately achieving defined objectives (e.g., as the saying goes, "What gets measured gets done.") • Identifies improvement areas and helps in the planning process.

Key Recommendations for Traditional Outsourcing Providers

Recommendation for Traditional Outsourcing Providers	Why This Is Important
Integrate Impact Sourcing indicators into existing CSR reporting initiatives. Most Traditional Outsourcers are already conducting some form of corporate social responsibility reporting; however most do not capture specific Impact Sourcing indicators such as professional advancement, social mobility, family condition, and living wages of disadvantaged individuals performing outsourcing work.	• Provides increased data points on the importance of Impact Sourcing and the relevant individual, family, and community impacts that are being made. • Helps to mitigate the negative stigma associated with outsourcing initiatives by reporting on the positive aspects.
Strive to collect data beyond demographical information on the target populations. In addition to demographical information about the hired target population, gather information that reflects the livelihood changes that are being made to that population. CSR messages should begin to provide deeper insights on the actual change that is occurring and not just the percentages of hires that come from a specific demographic as these reports often do.	• Demonstrates to stakeholders the actual impacts being made versus outcomes of hiring quotas. • Gives CSR report meaningful context about the livelihood impacts that will keep sponsors engaged.

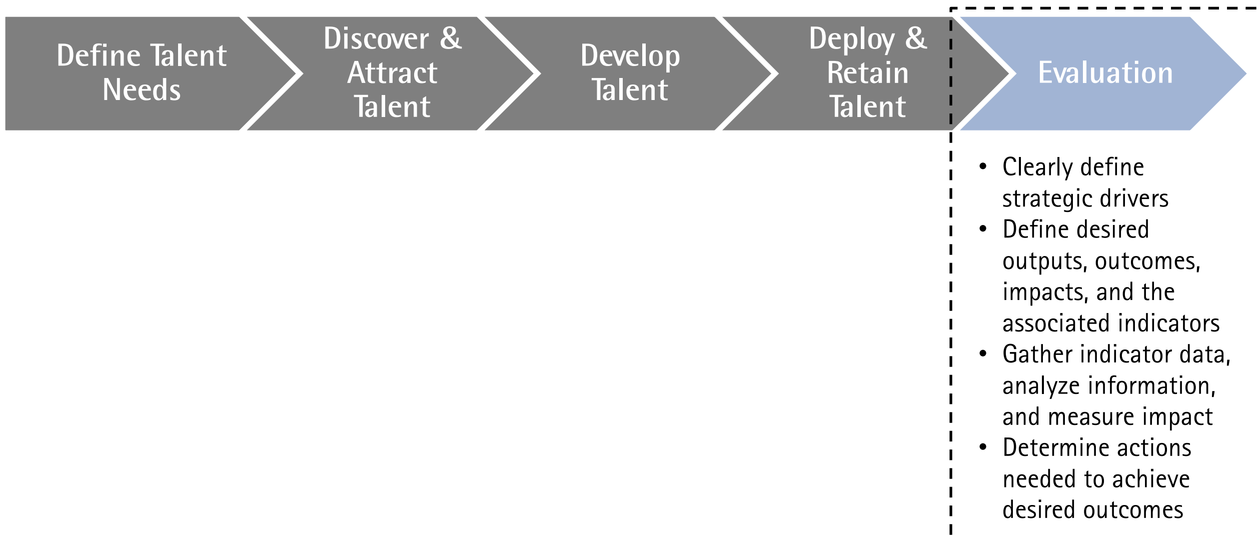
Recommended Approach

Now that we've defined Impact Measurement, elaborated on its importance, and identified trends found through research, we will outline a recommended approach for measuring impact. It is expected that organizations that review this recommendation will be operating at different levels of maturity that range from established, mature organizations to brand-new organizations that are just getting started. For this reason, our recommendations will be provided such that each organization can benefit from the recommendations no matter the maturity level.

Process

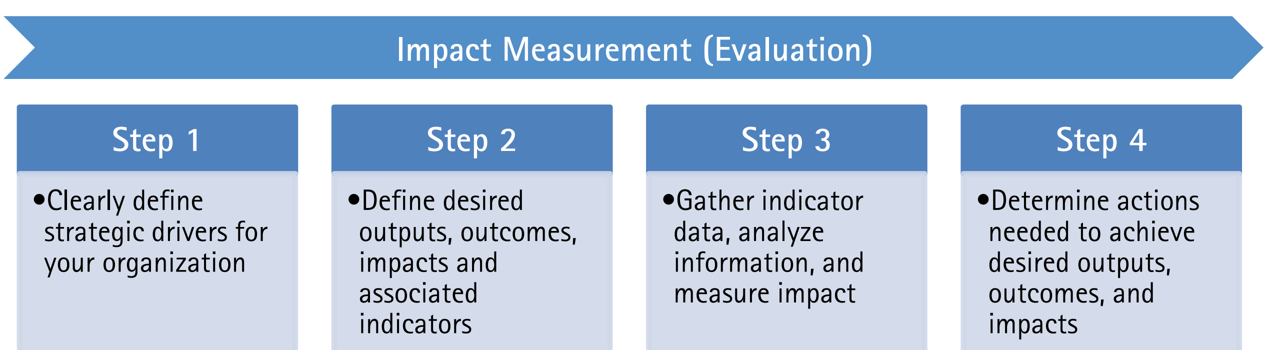
To begin, Impact Measurement resides in the Evaluation component of the Talent Life Cycle.

Figure 31. Talent Life Cycle – Impact Measurement



Traditionally, the scope of the Evaluation component of the Talent Lifecycle is focused on the evaluation of the individual candidates as they progress through recruiting, training, and deployment. In this recommendation we've adapted the framework slightly so that the evaluation component, which we will refer to Impact Measurement, includes the measurement of impacts beyond just the individual to their families and communities. Impact Measurement is an ongoing process that is integrated with the overall organization mission and strategy. An integrated evaluation process includes four steps.

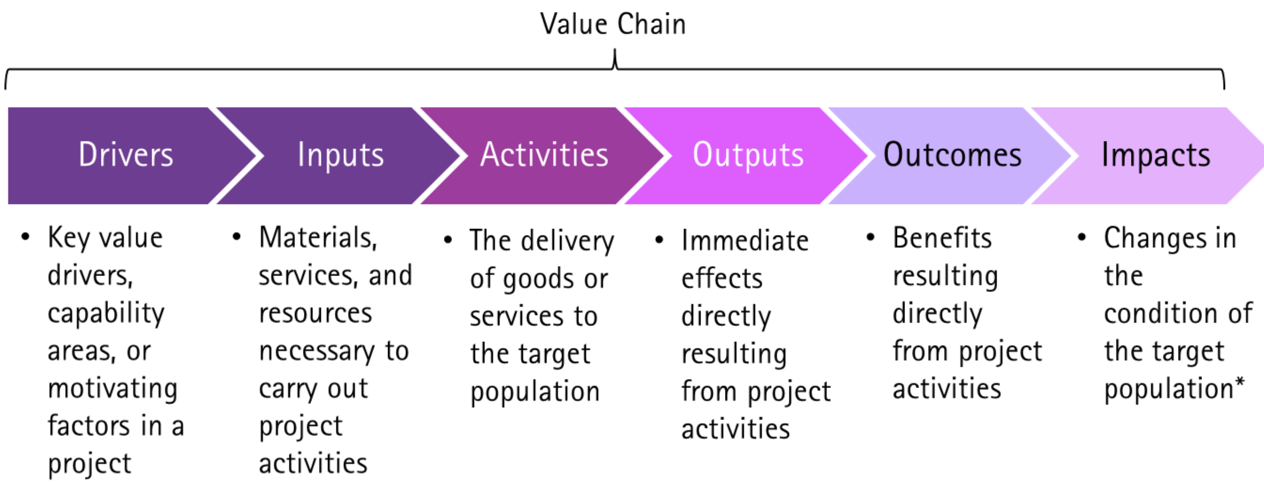
Figure 32. Impact Measurement Process



Logical Framework

A Logical Framework (LogFrame) lays the foundation for a systematic Impact Measurement approach. It provides the structure for an organization to document its end to end value chain. Once completed, the framework illustrates how the entire organization is connected from the value drivers that determine overall strategy to the inputs required for carrying out activities to the immediate outputs of the activities and finally to outcomes and the associated impacts. It gives structure to an otherwise convoluted jumble of inputs processes and outputs.

Figure 33. Logical Framework



*Note: Impact Sourcing target populations may vary. Examples include: Women, Youth, and Persons with Disability

The Framework builds upon the Impact Value Chain introduced in *The Double Bottom Line Methods Catalog*, Clark, Rosenzweig, Long, Olsen and the Rockefeller Foundation, 2004. The purpose of the Impact Value Chain is to illustrate how social value is created. The unique mission and objectives of each organization must be incorporated into their framework elements so it represents the organization accurately. Here's a description of each component of the Logical Framework:

Drivers – Drivers are the motivations that influence your purpose, mission, and strategy. Defining the strategic drivers for an organization is sometimes the largest hurdle. Depending on the size and scale of the organization it may take considerable time to attain buy-in from all stakeholders at various levels of the organization on what exactly the drivers are. This step is the most critical of the Logical Framework development because it impacts all other components.

Inputs – Inputs are essentially the materials, goods, services, and actions necessary to carry out the work. Labeling inputs is more straightforward than defining the drivers. Inputs may look similar across multiple organizations.

Activities – Activities represent the work that is done to convert inputs into goods or services that are provided to the client. In contrast to inputs, activities are often specific to an organization and indicative of the core competencies and processes that give the organization its competitive advantage.

Outputs – Outputs are the short-term, immediate results of work activities. Outputs are generally transactional and quantified with relative ease. Outputs have associated indicators. We will elaborate on indicators later in this study.

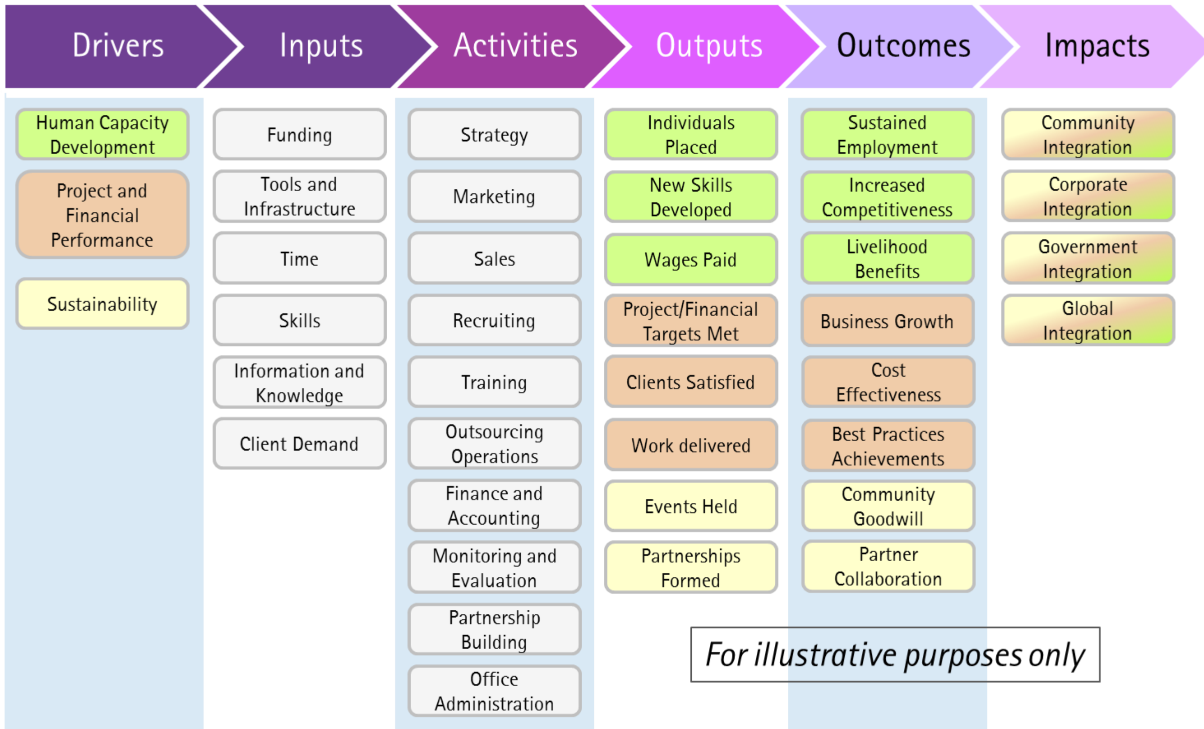
Outcomes – Outcomes are the changes that the organization is trying to create in society. The majority of time spent developing the Logical Framework may be on outcomes. Outcomes are often behavioral in nature. Outcomes have associated indicators.

Impacts – Impacts differ mostly from outputs and outcomes by scale and duration. Impacts are broad in scope usually affecting entire populations, industries, and governments and might only be traced over several years. Impacts typically align to larger goals to which the organization is only playing a small part in achieving such as the Millennium Development Goals. Impacts also have associated indicators.[29]

Below is an example Logical Framework that has been populated for a fictitious Impact Sourcing organization. This Impact Sourcing organization's mission is to reduce unemployment for underprivileged youth (e.g. school drop outs) in their local community by providing work opportunities in the outsourcing field. The organization has one office in a major city and employs 30 people. They recruit youth from local community based organizations and by hosting community events. The work activities primarily consist of data entry, image tagging, and transcription services.

[29] *Social Impact Assessment Guidance*. GSVC. 2012

Figure 34. Logical Framework Example



As the diagram illustrates, this organization's primary strategic drivers are Human Capacity Development (improving an individual's ability to sustainability provide for themselves), Project and Financial Performance (meeting project goals, timelines, and budgets), and Sustainability (building a self-sustaining support network of partners, donors, and community members). Pinpointing these strategic drivers is critical because the outputs, outcomes, and impacts should directly link to them. The boxes have been color-coded to illustrate this linkage across the value chain. The multi-colored Impacts components to the far right represent the contribution of each strategic driver to driving impacts at Community, Corporate, Government and Global levels. Community Integration means improved cohesion with within community and the resulting increase of livelihood benefits for all community members, not just employed individuals. Corporate integration means integration of Corporate Social Responsibility and Impact Sourcing initiatives into the strategy of corporations. Government integration includes support for social undertakings through funding and policy. Global Integration includes the Impact on global efforts such as Millennium goals.

Now that we've seen an example, next we will describe how indicators play a critical role in measuring the progress towards achieving the desired outputs, outcomes, and impacts documented in the Logical Framework.

Indicators and Balanced Scorecard

As mentioned previously, indicators are the measurements that an organization would use to determine performance towards meeting goals for output, outcomes, and impacts. Indicators are like a compass that provides directional and trending information. Indicators should reflect organization goals and be agreed upon by management. They should also be easy to understand and lead to action. The best indicators are SMART: Specific, Measurable, Attainable, Relevant, and Time Bound[30].

Table 15. SMART Indicators

[30] *IS KPI BPO Key Performance Indicators Information Sheet.* 1300 BPO. 2010

Specific	Specific enough to measure progress towards a certain goal
Measureable	Reliable and clear
Attainable	Data is available at reasonable cost and effort, and measures realistic goals
Relevant	Related to the intended goals
Time Bound	Value or outcomes are shown for a predefined and relevant period

Once an organization settles on SMART Indicators to track performance, these indicators should reside in an indicator catalog. The indicator catalog is an exhaustive list of indicators that track various outputs, outcomes, and impacts. A sample indicator catalog has been created to supplement this recommendation that contains several indicators that relate to the example Logical Framework illustrated earlier. The reader will find that each indicator is linked directly to an output, outcome, or impact component of the framework. The catalog also suggests data sources and frequency at which to collect the data. Here's an excerpt from that example:

Table 16. Indicator Catalog Example

EXAMPLE – Impact Sourcing Organization – Indicator Catalog (excerpt)						
Indicator Name	Description	Strategic Driver	Framework Component	Component Description	Data Source	Frequency
Positive Change	# (%) of disadvantaged individuals that indicate positive change in their life	Human Capacity Development	Outcomes	Livelihood Benefits	Baseline Assessment (Registration Form), Recurring Impact Survey	Semi-Annually
Increase in Income	# (%) of disadvantaged individuals that indicate an increase in income	Human Capacity Development	Outputs	Wages Paid	Baseline Assessment (Registration Form), Recurring Impact Survey	Semi-Annually
Education (Family)	# (%) of family members that further education as a result of disadvantaged individual's placement	Human Capacity Development	Outcomes	Livelihood Benefits	Recurring Impact Survey	Semi-Annually
Community Infrastructure Investment	$ of infrastructure investments made by organization	Human Capacity Development	Impacts	Community Integration	Community Programs Record, Financial Record	Semi-Annually
Tertiary Jobs Created	# of tertiary jobs created (e.g. janitorial, maintenance, security)	Human Capacity Development	Impacts	Corporate Integration	Financial Record, Observation	Semi-Annually

Not all of the indicators in the catalog should be actively tracked at any given time; only those relevant to the current desired results. The active indicators belong on the Balanced Scorecard while the others remain the catalog to be referenced when needed.

As mentioned in the Research section, the Balanced Scorecard is a tool used for measuring impact and aims to quantify the effect of Impact Sourcing across four impact areas (Growth, Cost Savings, Corporate Social Responsibility, and Community). Ideally, a Balanced Scorecard should contain indicator data for each area over the course of several years or other desired time frame. This allows the organization to view the trajectory of the indicator whether positive or negative. Continuing with the fictitious Impact Sourcing example from above, the diagram below serves as an example Balanced Scorecard populated with indicators:

Table 17. Balanced Scorecard Example

EXAMPLE – Impact Sourcing Organization – Balanced Scorecard							
	2010	2011	2012		2010	2011	2012

Cost Savings Objectives Achieved			
Labor Cost Reduction	36%	29%	19%
IT Cost Reduction	14%	16%	4%
CSR Objectives Achieved			
Total Employees Trained	1	18	7
Number of Underprivileged Youth Employed	14	23	28
Increase in Individual Income (avg)	74%	60%	73%

Growth Objectives Achieved			
Revenue Growth	70%	83%	106%
Profit Growth	36%	55%	110%
Community Objectives Achieved			
Number of Family Members Educated	14	18	25
Number of Tertiary Jobs Created	4	7	10
Community Infrastructure Investments	62%	100%	179%

The indicator data used to populate the Balanced Scorecard may come from various sources, both internal and external. Examples include administrative systems, surveys, house visits, interviews, external databases and even observation. Most indicators will require an initial measurement to serve as the baseline for monitoring change. For example, if capturing data for indicators that measure the impact on an individual's personal situation or living condition, initial data should be captured in an onboarding or assessment survey. Once the baseline data is collected, another survey or assessment should be conducted several months afterward and then again in regular intervals. Keep in mind that selecting a random sample may be adequate depending on the sample and population sizes rather than surveying an entire population. This also can be more cost-effective depending on the technique for gathering data. Lastly, an exit survey should be distributed to employees as they leave the organization during which they may volunteer details to remain in contact for further Impact Measurement.

Ultimately, the goal is to automate as many data collection processes as possible and this can be done through central administrative systems or interfaces to public data repositories. For example, an administrative web-portal is one way to automate data collection from within the organization. Through a web-based portal that is accessible from any location by computer or mobile, the organization can distribute and collect surveys from constituents. These surveys could be populated by the employed individuals themselves, or even completed by third-party participants such as community leaders or NGO partners in the field who have been granted access to the portal. This type of automation increases the reliability of the data, speed of analysis, and breadth of which data can be collected. Details on basic and advanced data collection techniques are elaborated on in the Maturity Model section later in the recommendation.

Once the Balanced Scorecard has been constructed, indicators selected, and data gathered, the organization should review the scorecard on routine basis. Through periodic review of the Balanced Scorecard and indicators, the organization can assess its overall performance and determine if corrective action is required to adjust its path towards achieving desired outputs, outcomes, and impacts and do so proactively.

If an organization determines that corrective action is necessary, the DMAIC (Define, Measure, Analyze, Improve, Control) process prescribed by Lean 6 Sigma experts is a methodology for improving processes.[31]

[31] *The Basics of Lean 6 Sigma.* Go Lean Six Sigma. 2012

Figure 35. DMAIC Process

Define	Measure	Analyze	Improve	Control
• "Define the Problem" • Create a high-level view of the process, understand the needs of the customers of the process	• "Map out the current process" • Determine the starting point or baseline of the process and look for clues to understand the root cause for inefficiency or waste	• "Identify the cause of the problem" • Collect data, analyzes both the data and the process in an effort to narrow down and verify the root causes of waste and defects	• "Implement and verify solution" • Develop innovative, elegant solution in a structured approach	• "Maintain the solution" • Document exactly how to pass solution infrastructure to employees who work within the process

The ideal processes for DMAIC improvement are those that have an obvious problem, have potential to increase revenue, reduce cost, or improve efficiency, and have collectable data. By improving the process, an organization can increase likelihood of achieving desired outputs, outcomes, and impacts. Taking no corrective action may lead to more unsatisfactory results.

Appendix H provides a template and example for the Logical Framework, Indicator Catalog, and Balanced Scorecard.

Maturity Model

The purpose of a maturity model is to describe success factors at various levels of maturity, or scales of mastery, as an organization develops. Critical success factors describe the attributes that an organization needs to successfully meet its Impact Measurement goals

Table 18. Maturity Model – Impact Measurement

Success Factor	Emerging (1)	Basic (2)	Advanced (3)	High Performance (4)
Clearly defined drivers	• Mission, purpose, goals, objectives are not defined	• Mission, purpose, goals, objectives are defined without framework or tool assistance	• Use of LogFrame or similar tool for defining mission, purpose, goals, objectives • Ad-hoc review of alignment between mission, objectives, and indicators	• Use of LogFrame or similar tool for defining mission, purpose, goals, objectives • Consistent review of alignment between mission, objectives, and indicators
Unified Implementation	• Processes are non-standardized • No industry frameworks or tools applied including LogFrame, indicator catalog, and Balanced Scorecard	• Few standard processes • Awareness of industry standard frameworks or tools throughout organization even if not applied • Scarce use of LogFrame, indicator catalog, and Balanced Scorecard	• Standard processes throughout organization but not documented • Industry frameworks applied • Awareness of LogFrame, indicator catalog, and Balanced Scorecard across organization	• Standard and documented and processes • Industry frameworks or tools applied • LogFrame, indicator catalog, and Balanced Scorecard implemented throughout organization

Success Factor	Emerging (1)	Basic (2)	Advanced (3)	High Performance (4)
Effective data analysis	• Analysis largely subjective, based on observation or anecdotal information	• Analysis largely subjective, based on observation or anecdotal information • Individual impacts are measured	• Analysis largely objective but includes subjective evaluation • Individual, Family impacts are measured	• Analysis largely objective but includes subjective evaluation • Real-time reporting capability • Individual, Family, and Community impacts are measured
Ability to Scale	• No collaboration with CBOs and NGOs • No dedicated Impact Measurement resource • No feedback mechanisms in place for stakeholders	• No collaboration with CBOs and NGOs in field • No dedicated Impact Measurement resource (time split among other responsibilities) • Feedback mechanisms in place for some stakeholders	• Collaboration with CBOs and NGOs in field • Part-time dedicated Impact Measurement Resource • Continuous process improvement culture • Feedback mechanisms in place for most stakeholders	• Integration with CBOs, and NGOs in field • Dedicated Impact Measurement Resource(s) • Continuous process improvement culture • Feedback mechanisms in place for all stakeholders
Tools leveraged	• None	• Tools primarily developed in-house • Basic solutions used (e.g. MS Word, Excel)	• Tools both developed in-house or packaged solutions with little customization • Advanced solutions used (e.g. SQL Database, Web interface, Reporting)	• Tools primarily packaged solutions that may be customized • Sophisticated solutions used (e.g. Dev Results, Newdea, Social Solutions)

Summary

This recommendation described the high level process for measuring impact and explained how it fits within the Talent Life Cycle. To address the need for a standardized, industry relevant approach, it introduced the Logical Framework as the starting point and foundation for building Impact Measurement capabilities. To accompany the framework, the approach explained how SMART indicators serve as the guiding measures that should be tracked in a Balanced Scorecard over regular intervals in order to show trending information on the performance of achieving desired outcomes. Lastly, the Maturity Model provided the ability for organizations to benchmark themselves against varying levels of mastery for several Impact Measurement success factors.

We recognize that organizations may lack the capacity to implement every component of this approach and therefore recommend adopting the approach piecemeal. For example, if an organization cannot undertake the development of a full Logical Framework, they might go straight to selecting and tracking indicators. In cases such as this, organizations should start with basic indicators; this will prevent a scenario in which time, money, and effort is used to collect data and track indicators that do not truly reflect the changes that the organization is striving to make. Documenting the end-to-end value chain helps mitigate this risk. As the well-known process improvement professional James Harrington states, "If you can't measure something, you can't understand it. If you can't understand it, you can't control it. If you can't control it, you can't improve it."

As organizations continue to prioritize corporate social responsibility agendas in pursuit of Shared Value creation, measuring the impact of their efforts will become as important as the pursuit itself. By implementing this recommended approach for Impact Measurement, we believe organizations can develop and enhance the Impact Measurement capabilities that will enable them to demonstrate value to stakeholders, improve operations, and increase the positive change they are striving to make in society though Impact Sourcing.

Resources

For more information regarding any of the elements mentioned above in the recommendation approach for Impact Measurements, visit the additional resources documented below.

Logical Framework

- Impact Assessment: Understanding and Assessing our Contributions to Change, INTRAC (http://www.intrac.org/data/files/resources/695/Impact-Assessment-Understanding-and-Assessing-our-Contributions-to-Change.pdf)
- Social Impact Assessment (SIA) Guidelines, Global Social Venture Competition: (http://www.gsvc.org/docs/SIA_Guidelines_2013.pdf)
- Double Bottom Line Project Report: Assessing Social Impact in Double Bottom Line Ventures, SVT and Rockefeller: (http://www.riseproject.org/DBL_Methods_Catalog.pdf)

Balanced Scorecard

- Balanced Scorecard Examples and Success Stories (http://balancedscorecard.org/?TabId=57)
- Exploring the Value Proposition for Impact Sourcing, Accenture and Rockefeller: (http://www.rockefellerfoundation.org/uploads/files/509cc19c-f15f-4a62-8b9f-45d342d95bb6-isc-report.pdf)
- Impact Measurement Approaches: Recommendations to Impact Investors, SVT and Rockefeller: (http://svtgroup.net/wp-content/uploads/2011/09/RIIC_Report_Final.pdf)

Indicators & Existing Data Sources

- CSCF Monitoring, Evaluation and Lesson Learning Guidelines, DFID: (http://www.dfid.gov.uk/Documents/funding/civilsocietycf-lesson-guidelines.pdf)
- Indicators by Country, Progress Out of Poverty: (http://www.progressoutofpoverty.org/country)
- Population Data and Development Indicators, World Bank:
- (https://maps.worldbank.org/datasources)
- World Population Data Sources, United Nations:
- (http://www.un.org/popin/data.html)

DMAIC Process

- DMAIC – The 5 Phases of Lean Six Sigma: (http://www.goleansixsigma.com/dmaic-five-basic-phases-of-lean-six-sigma/)
- Six Sigma DMAIC Roadmap: (http://www.isixsigma.com/new-to-six-sigma/dmaic/six-sigma-dmaic-roadmap/)

Evaluation Tools

- Dev Results: Web application for international development programs to manage projects, to collect and organize monitoring & evaluation (M&E) data, and to map and visualize that data
- Newdea: Integrated social impact technology platform that streamlines and maximizes Impact Measurement across social programs of all types and size
- Social Solutions : Performance management software for human service organizations

Conclusion

We are seeing signs that point to a strong positive outlook for Impact Sourcing:

- Traditional BPO and ITO outsourcing as whole is a $500 billion industry, and it continues to grow.
- Smaller Impact Sourcing Service Providers are adding new clients, revenue streams, and employees.
- There is tremendous growth in technology infrastructure and access to increased bandwidth in the developing world.
- The concept of Shared Value continues to resonate with the private sector. Large companies, including traditional outsourcers, are increasingly reporting on their Corporate Social Responsibility objectives and seeking to increase their overall competitiveness by also improving the health of the communities in which they operate (i.e., doing well by doing good).

There appears to be solid momentum and an opportunity for the Impact Sourcing sector to further scale through new government policies, new incentives, enablement of infrastructure development, increased focus on sales and marketing, as well as through increased development of human capital.

It is this last area that this paper focused on, specifically within the talent management life cycle. By leveraging the recommendations and approaches included in this report, both ISSPs and traditional outsourcers can create a strong operational foundation for recruitment, training, and impact measurement which will support further organizational growth.

For ISSPs –leveraging the included approaches can help:

- Enhance their recruiting strategy,
- Improve the speed at which they hire,
- Increase their probability of identifying appropriate, trainable resources,
- Decrease attrition / increase retention,
- Leverage new tools for recruitment and training,
- Increase visibility into recruitment and training metrics,
- Provide increased (anytime, anywhere) access to learning activities via new eLearning modules,
- Decrease "time to proficiency", and
- Measure Impact Sourcing outcomes and impact.

For traditional outsourcers– leveraging the included approaches can help:

- Broaden their recruiting strategy,
- Increase relationships with non-profits/NGOs,
- Improve how they onboard disadvantaged workers,
- Increase their probability of identifying appropriate, trainable resources,
- Decrease attrition / increase retention,
- Leverage existing tools for recruitment and training of Impact Sourcing employees,
- Enhance their mentoring program to account for higher need individuals, and
- Measure Impact Sourcing outcomes and impact.

All of these can help both ISSPs and traditional outsourcers to decrease costs, increase efficiencies, increase client satisfaction, and ultimately provide greater positive impacts which can, in turn, be communicated to donors, shareholders, and other key stakeholders.

Table of Figures

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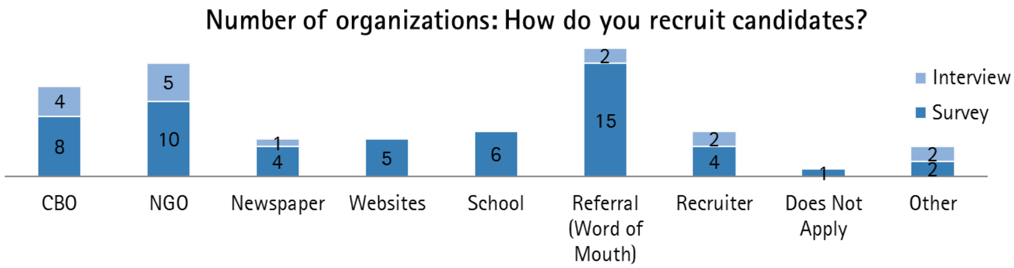
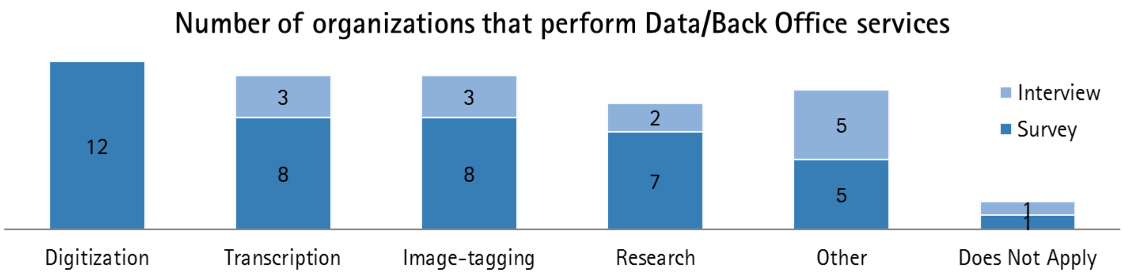
Tal Viskin
Thendral Rajendran

Appendix A – Interview and Survey Data

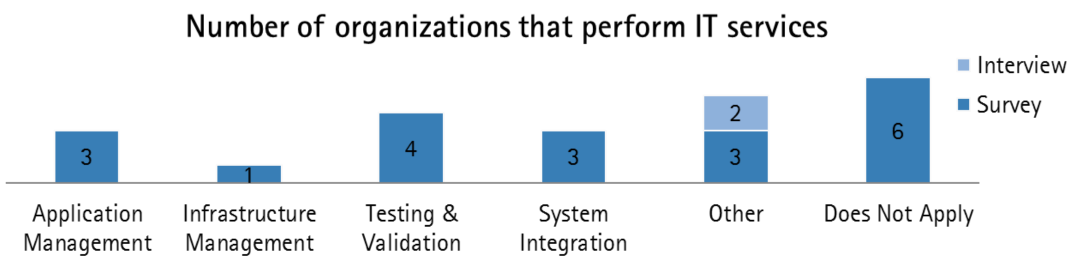
The following charts illustrate responses from organizations that participated in interview and surveys:



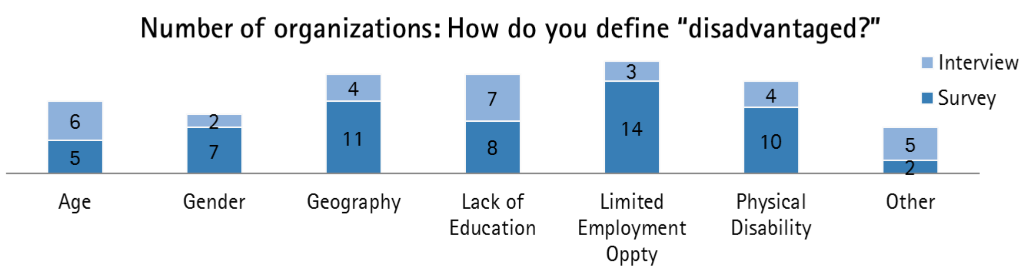
Other includes: Adverts in local cable TV channels, street theater (small act), pamphlets



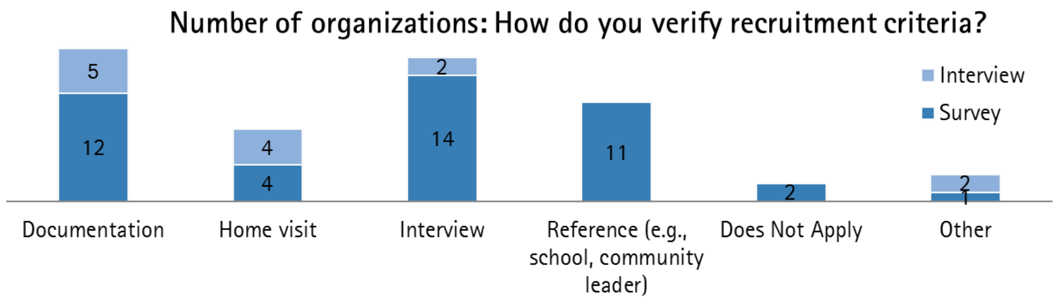
Other includes: Article Writing, Analysis, Product Testing, Scanning, Data Entry, Voice (Call Center), Accounting, HR WFA



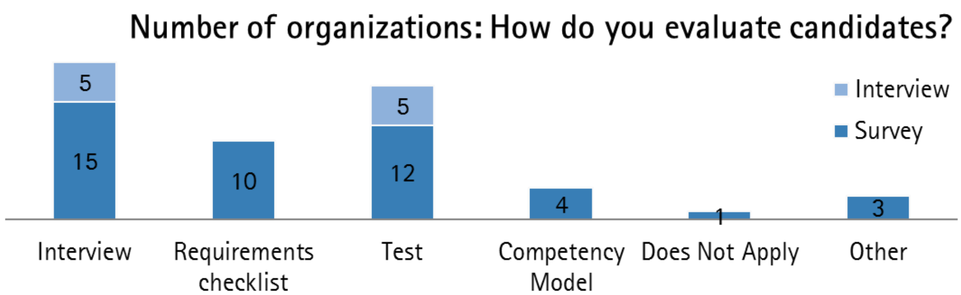
Other includes: Web Design, Image Enhancement, Computer Maintenance, Help Desk



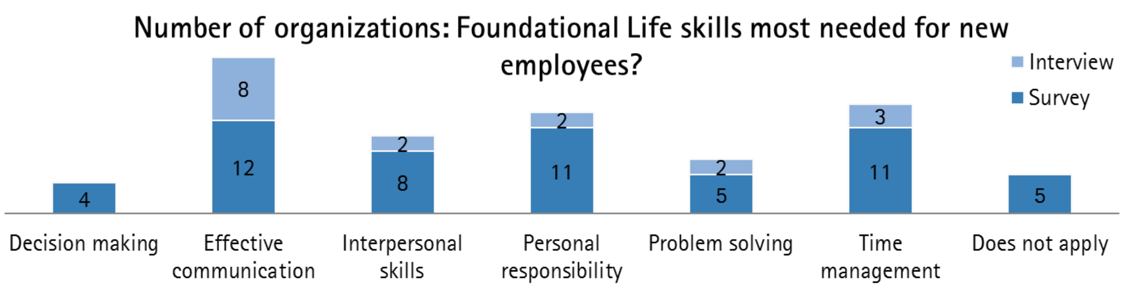
Other includes: Qualify for government education loans, Inadequate connectivity and power, financial hardship, single parent home



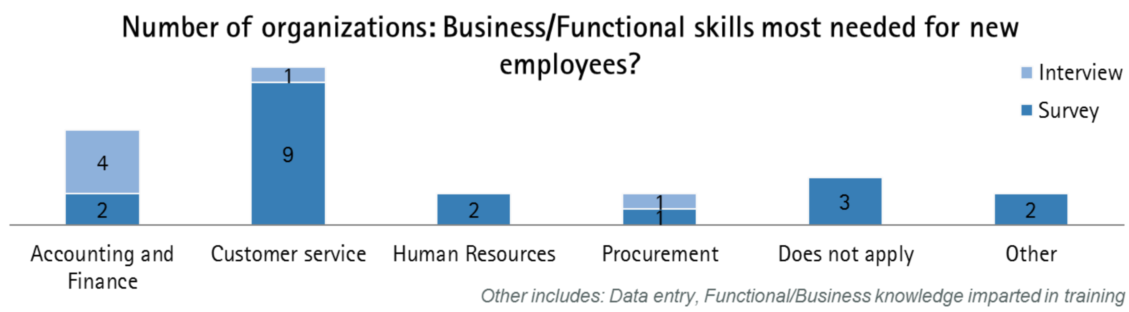
Other includes: Conduct background check, depend on NGO/CBO to verify, partner with delivery center partners to verify

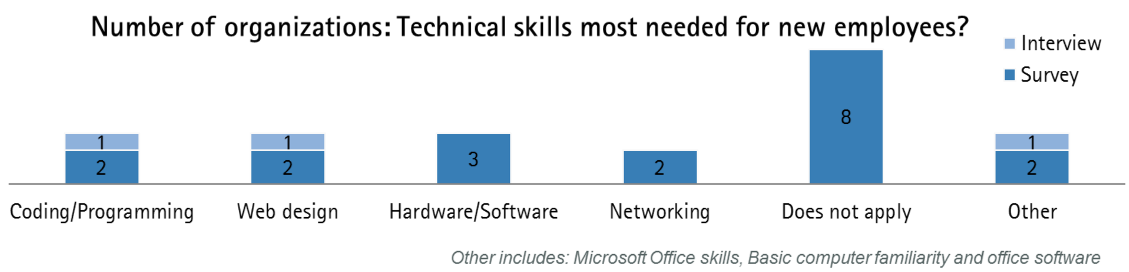


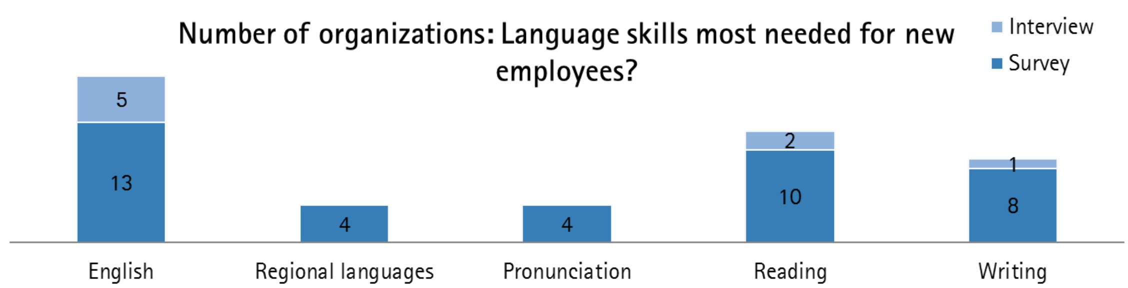
Other includes: Typing test, teacher evaluations, evaluate 1-month of training

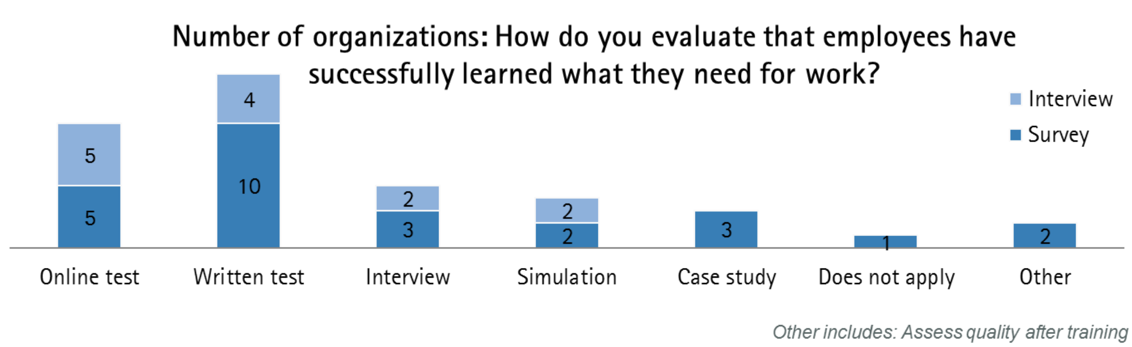


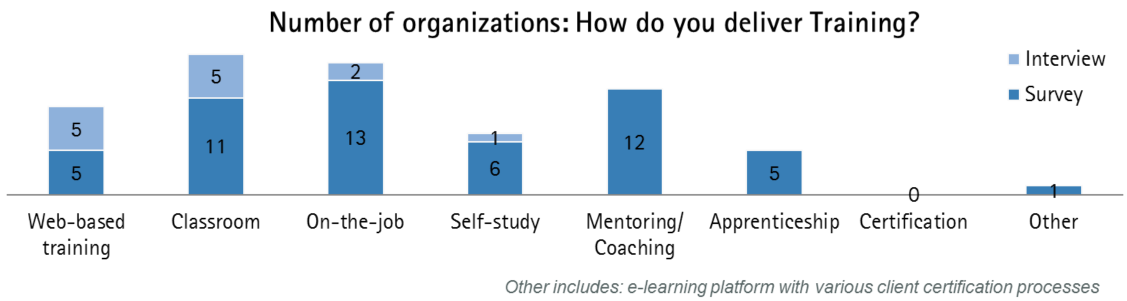
Other includes: Eye for quality, recognition of handwriting


Number of organizations: Business/Functional skills most needed for new employees?
Interview
Survey
4
2
1
9
2
1
1
3
2
Accounting and Finance
Customer service
Human Resources
Procurement
Does not apply
Other
Other includes: Data entry, Functional/Business knowledge imparted in training

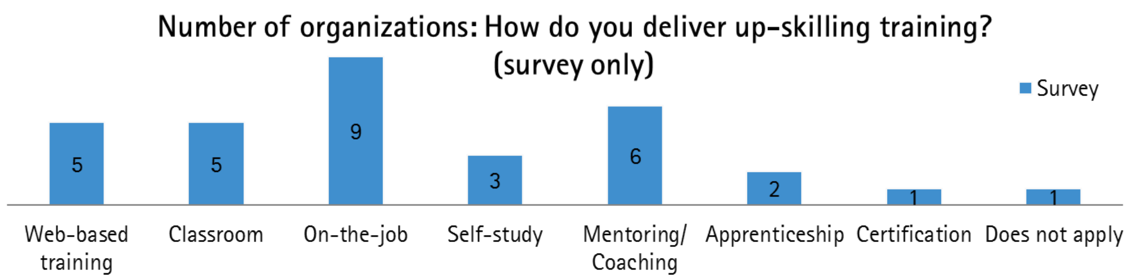

Number of organizations: Technical skills most needed for new employees?
Interview
Survey
1
2
1
2
3
2
8
1
2
Coding/Programming
Web design
Hardware/Software
Networking
Does not apply
Other
Other includes: Microsoft Office skills, Basic computer familiarity and office software


Number of organizations: Language skills most needed for new employees?
Interview
Survey
5
13
4
4
2
10
1
8
English
Regional languages
Pronunciation
Reading
Writing


Number of organizations: How do you evaluate that employees have successfully learned what they need for work?
Interview
Survey
5
5
4
10
2
3
2
2
3
1
2
Online test
Written test
Interview
Simulation
Case study
Does not apply
Other
Other includes: Assess quality after training



Number of organizations: How do you deliver Training?
Interview
Survey
5
5
5
11
2
13
1
6
12
5
0
1
Web-based training
Classroom
On-the-job
Self-study
Mentoring/ Coaching
Apprenticeship
Certification
Other
Other includes: e-learning platform with various client certification processes



Number of organizations: How do you deliver up-skilling training? (survey only)
Survey
5
5
9
3
6
2
1
1
Web-based training
Classroom
On-the-job
Self-study
Mentoring/ Coaching
Apprenticeship
Certification
Does not apply

Appendix B – Maturity Assessment Approach

Maturity Assessment Approach – Diagnose Phase

This maturity assessment asks about organizational practices; it is not simply a collection of employee competencies. Instead of asking each employee to rate his or her own competency level, it asks about the practices that are in place in the organization. After identifying the organization's existing capabilities, decisions can be made regarding the individual competencies required to carry out current and desired capabilities. The Diagnose Phase of the maturity assessment entails collecting data, leading practices and asking employees in a given function to report on the practices that are used.

Table 19. Maturity Assessment – Diagnose Phase

Common tasks in the Diagnose Phase	Objectives	Expected Outcomes
Set up data collection plan and timeline	Set and manage expectations on the assessment outcomes and timeline	Data collection scope & requirements defined
Define interview and/or survey questions for leads and employees	Set expectations for data gathering and discussion	Data collection questionnaire developed
Conduct data collection (survey or interview)	Ensure proper data quality in data gathering	Data consolidation is conducted and data analysis is prepared
Analyze and benchmark collected data	Evaluate results	Evaluate as-is vs. to-be state for the organization's function
Conduct and analyze interviews (clients and stakeholders)	Collect a reflection of the organization's functions from client and stakeholders	Identification of weak spots and strong spots
Develop a results report to support the decision about next steps and make prioritization recommendations	Identification and discussion around the possible improvement opportunities to drive both efficiency and effectiveness in each function	Results report and initial roadmap for next steps
Present findings to leadership and key stakeholders for buy-in	Obtain approval to continue to the next phase of developing new processes and the roadmap to the future state model	Formal sign-off from leadership and key stakeholders to follow next steps; if the request is not approved, then additional analysis may need to be conducted and recommendation updated

Respondents may provide responses to a questionnaire to indicate whether a practice is used on the job within their respective function (Recruitment, Training and Impact Measurement). Respondents do not rate themselves on their ability to apply the practices. Some general questions that could be considered in the development of the questionnaire are:

- Recruitment, Training or Impact Measurement goals
  - What current challenges are there regarding the function and organization?
  - What are the current function's goals based on the organization's strategy?
  - What should be the goals in 2-5 years?
- Current performance of Recruitment, Training or Impact Measurement
  - How well aligned is the function to the demands of the organization?
  - Do processes meet client and/or stakeholder expectations?
  - Do you have the necessary skills and competencies to meet the expectations?
  - Does your technology support Recruitment, Training or Impact Measurement?
- Strategy for Recruitment, Training, or Impact Measurement
  - Is the strategy documented and openly discussed?
  - Is there a tracking and performance management process in place to ensure successful implementation of the strategy?
- Organizational questions on Recruitment, Training or Impact Measurement
  - How is the function structured to provide services to the organization?
  - Are there any Key Performance Indicators that the function follows?
- Questions on the people working in Recruitment, Training or Impact Measurement
  - What are the core competencies for employees within the function?
  - What kinds of competencies are needed in the future?
  - What role do employees in Recruitment, Training or Impact Measurement have at this moment?

The survey might be the sole basis for the results, in which case the survey results are not validated. To validate the results (e.g., confirm the accuracy of the responses), interviews and focus groups can be undertaken. The validation process ensures that respondents understood the practices that were described and substantiates the results with documentation. The results are reported in terms of maturity level for the overall organization.

Maturity Assessment Approach – Develop Phase

The Develop Phase envisions the future state of the organization's functions and describes the high level process and technology.

Table 20. Maturity Assessment – Develop Phase

Common tasks in the Develop Phase	Objectives	Expected Outcomes
Define the to-be state – this may be in terms of short-term and long-term initiatives	Present a vision of the future function	Documented future state processes and function model
Review impact of proposed improvement opportunities on Recruitment, Training or Impact Measurement, including consideration of the following: Strategy, People, Process, and Technology	Interpret the impact of the proposed improvement opportunities on the existing organization	Establish key design principles for each area impacted by the proposed changes, for instance: • Strategy • People • Process

		• Technology
Develop final recommendations (e.g., target list of projects to be pursued within 1 year, 3 years and 5 years)	The development of a single group view of all on-going and future initiatives – ensuring avoidance of duplicate/ redundant effort	Develop and present the information upon which to base the decision to proceed
Development of an implementation roadmap for the realization of the project goals	The establishment of timelines and tasks for transformation	Understanding of resource / investment requirement

At this stage of the assessment, the organization defines the future state of Recruitment, Training or Impact Measurement. To-be business processes will be documented and the organization determines the impact of the proposed new or enhanced Strategy, People, Process and Technology. The organization will also need to develop the final recommendation of the short-term or long-term goals of the projects it wants to pursue, and devise a roadmap to reach that desired future state.

Maturity Assessment Approach – Deploy Phase

The Deploy Phase relates to activities that need to be completed to implement the roadmap to achieve the future state of the organization's functions.

Table 21. Maturity Assessment – Deploy Phase

Common tasks in the Deploy Phase	Objectives	Expected Outcomes
Organize dedicated team to complete roadmap to future state model	Review responsibilities and work plan with dedicated team	Understanding of tasks that need to be completed and by when to achieve future state model
Prepare more detailed communication for impacted employees – socialize it with the leaders and stakeholders	Inform impacted employees and stakeholders and get approval	Communications to all stakeholders and impacted employees have taken place and support is ensured
Implement roadmap to future state model	Complete activities in a timely and efficient manner	Regular status meetings and review of milestones/tasks to achieve future state model

At this point of the process, the organization will need to assemble a team of qualified individuals that champion the change and can work as a team to ensure the organization achieves its goals. Another task is to communicate the upcoming change to the organization. There can be targeted communications to key stakeholders (e.g., clients, donors) or to impacted employees within a function, and then a broader communication to the organization as a whole. The benefit of being transparent and communicating the organization's plan is to obtain support from all employees and develop a sense of accountability to help the organization reach its desired future state. A strong project lead will need to be selected to ensure all project milestones documented on the roadmap are being met and drive the team to achieve the organization's future state.

Organizational benefits of conducting a maturity assessment include having a better understanding of the organization's current capabilities and establishing a baseline for tracking improvements over time with the focus on organizational growth and development. An assessment also can help prioritize capabilities that need to be put in place to reach higher maturity levels. In this sense, the organizational maturity model lays out a roadmap for change and provides a way of aligning business strategy with organizational processes and the tools and techniques that are needed to implement those processes. Maturity assessments set the stage for organizational change and improvement by facilitating the identification and sharing of leading practices.

Appendix C – Recruitment Process Flows

Figure 36. Process Flow Diagram – Define Competencies and Requirements

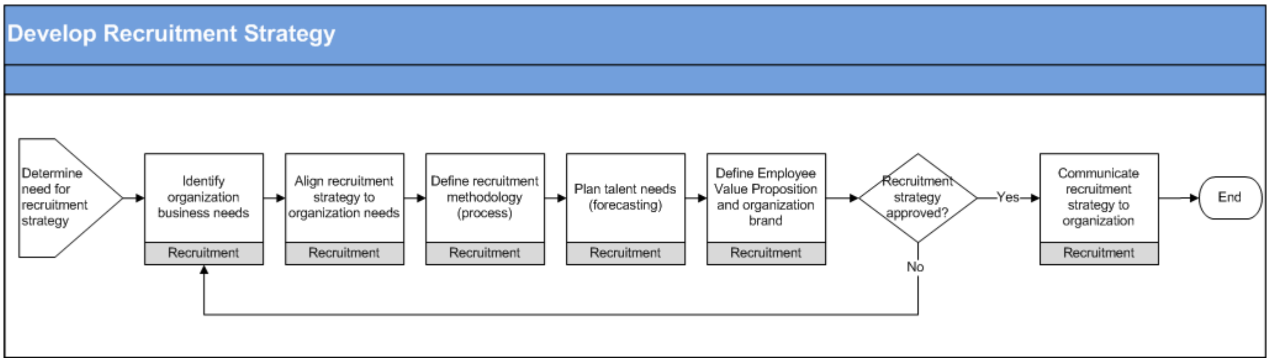


Figure 37. Process Flow Diagram – Define Competencies and Requirements

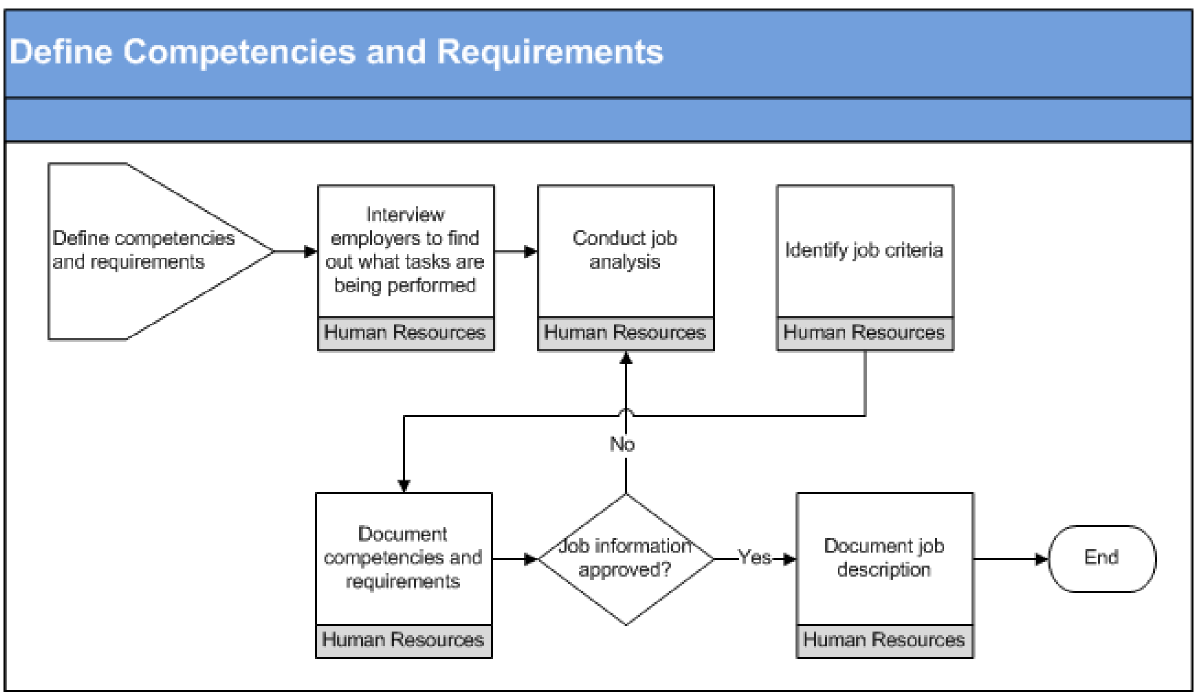


Figure 38. Process Flow Diagram – Source Candidates

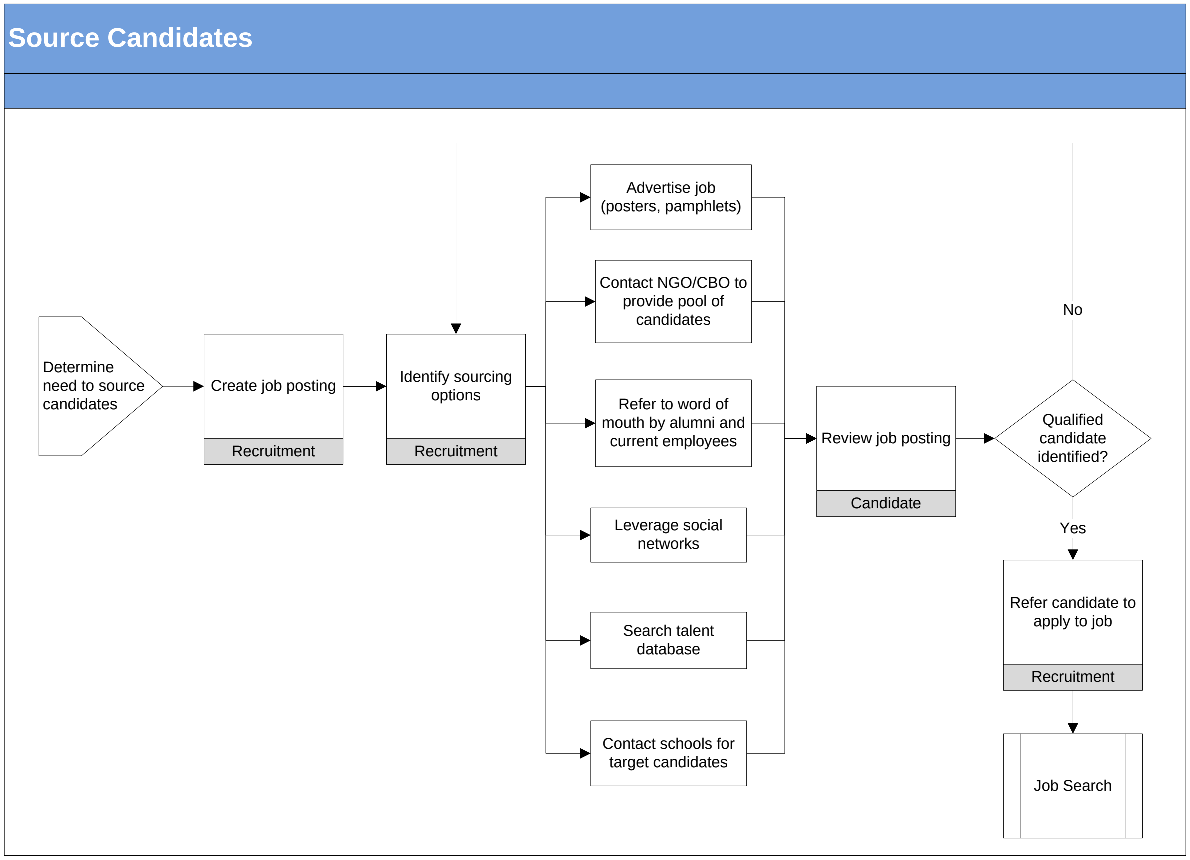


Figure 39. Process Flow Diagram – Job Search

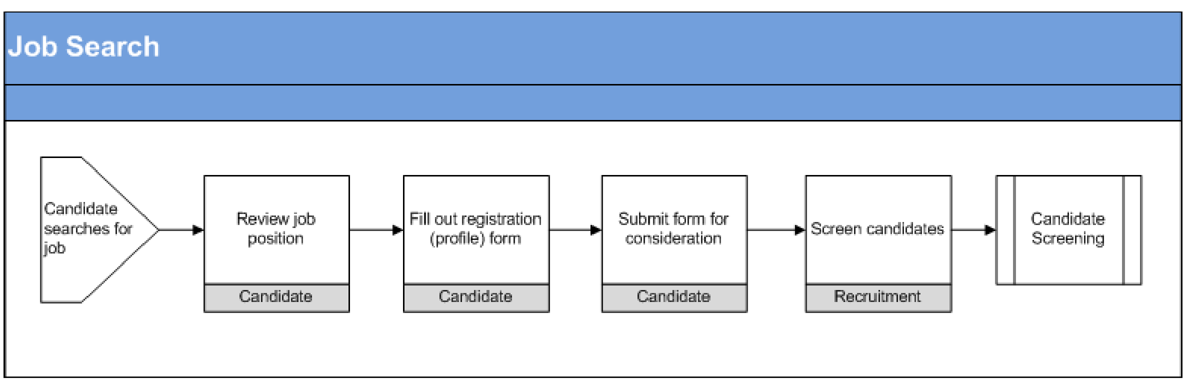


Figure 40. Process Flow Diagram – Screen Candidate

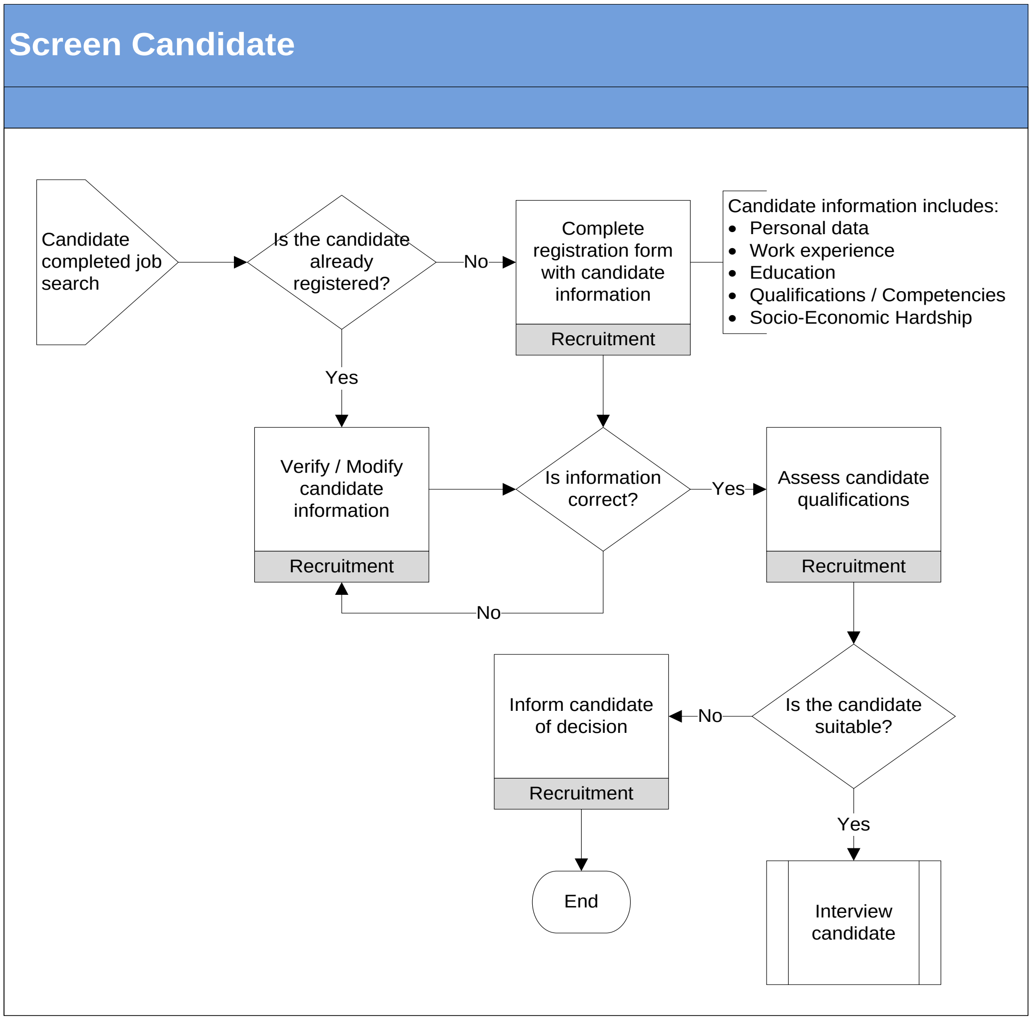


Figure 41. Process Flow Diagram – Interview Candidate

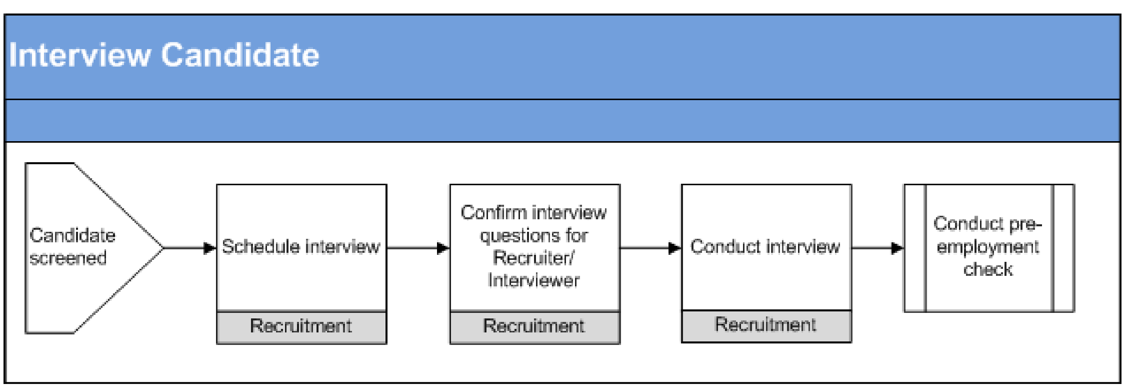


Figure 42. Process Flow Diagram – Conduct Pre-Employment Check

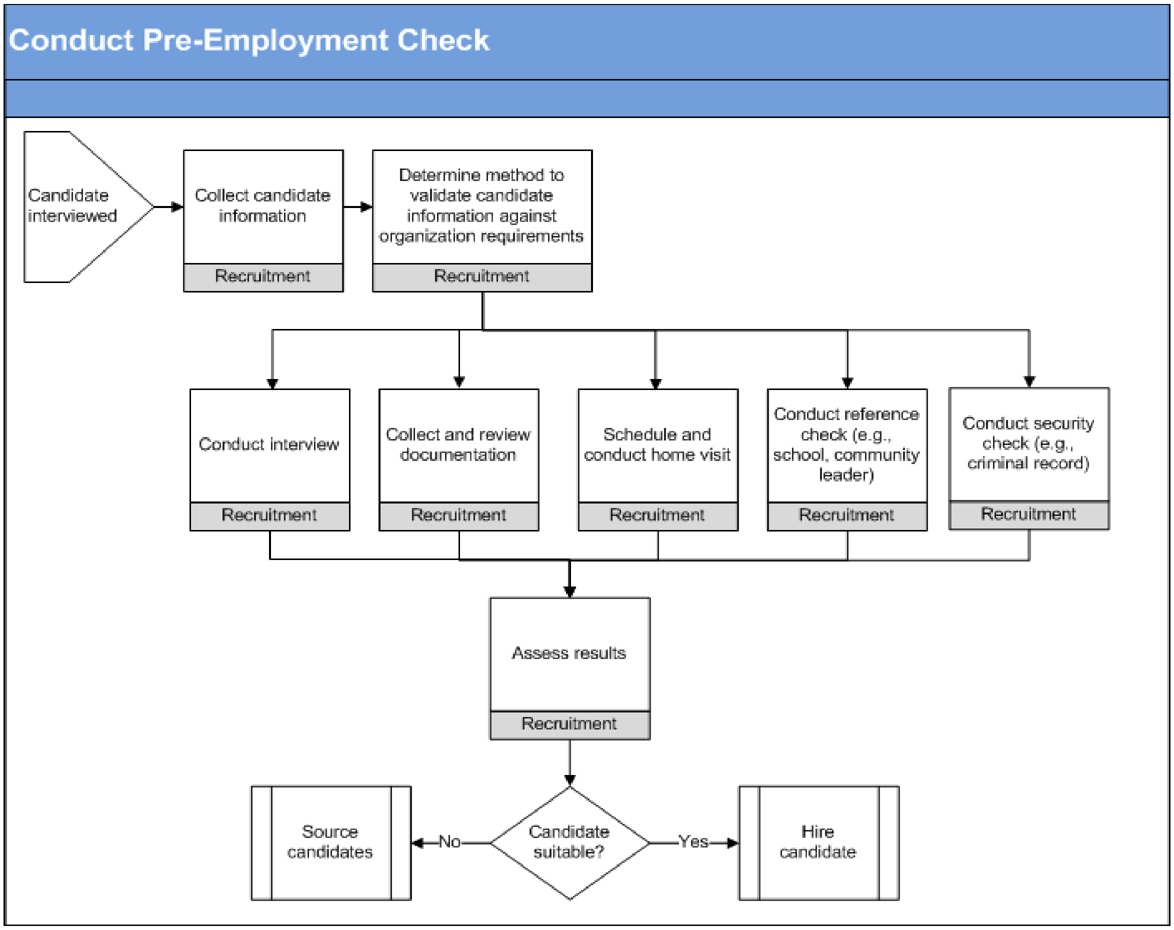
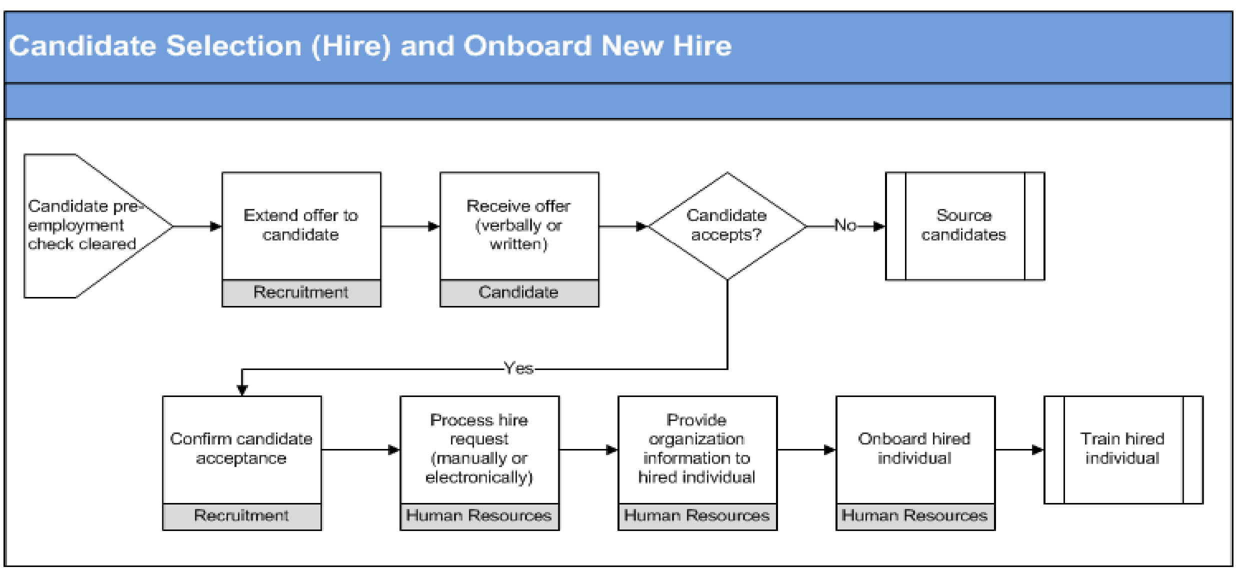


Figure 43. Process Flow Diagram – Candidate Selection (Hire) and Onboard New Hire



Appendix D – Competency Model Sample

Competency_Model_FINAL.docx

Appendix E – Recruitment Interview Questions

Sample interview questions:

Communication:
- Describe a time you used your communications skills to negotiate with an angry person.
- When do you think it is best to communicate in writing? When do you handle it face-to-face?
- Tell me about a time when you thought someone wasn't listening to you. What did you do?

Customer Service:
- Tell me about a time when you went out of your way to give great service to a customer.
- What does "customer" mean to you?
- "Yes" is the word clients/customers like to hear. However, if you had to say "no," how would you do it?

Decision Making:
- Describe a time when you had to make a very important and difficult decision that affected many people.
- How would you react if the following should occur: A co-worker suddenly collapses on the floor. After a few minutes, a large crowd with loud voices and making demands gathers around.

Initiative:
- Could you share with us a recent accomplishment of which you are most proud?
- Describe a time when you kept from getting bored when dealing with routine tasks.
- Tell me about a career goal that you have accomplished and why that was important to you.

Personal Effectiveness:
- Give us an example of how you stay organized when performing multiple tasks.
- What do you do when you know you are right and your manager disagrees with you? Give me an example of when this has happened to you.
- Describe a time when you had to deal with a difficult manager, co-worker or customer. How did you handle the situation?

Stress Management:
- You are angry about an unfair decision. How do you react?
- How do you know when you are stressed? What do you do to de-stress?

Appendix F – Recruitment Interview Guide Template

Sample - Interview Guide Template.doc

Appendix G – Curriculum

Impact_Sourcing_Training_Curriculum_FIN/

Impact_Sourcing_Training_Curriculum_FIN/

Appendix H – Learning Level 1 Satisfaction Survey

Post ILT Level 1 Survey_SAMPLE.doc

Appendix I – Learning Path Example

Modularized training for a Digitization Processor new to the role:

Topic	Title	Duration (Hours)	Delivery Method
Life Skills	Self Esteem	1.00	Instructor-Led
Life Skills	Coping and Self-Management Skills	1.00	Instructor-Led
Life Skills	Introduction to Problem Solving	1.50	Instructor-Led
Life Skills	Managing Your Day	2.25	Instructor-Led
Life Skills	Money Management	1.00	Instructor-Led
Language Skills	Written English Communication Skills	40.00	Instructor-Led
Language Skills	English Language Skills	80.00	On-Line
Life Skills	Working With Numbers	4.00	Instructor-Led
Workplace skills	Basic Fundamentals of an Organization	0.75	Instructor-Led
Workplace skills	Orientation to working in a Corporate Environment	3.00	Instructor-Led
Workplace skills	Being an Effective Team Member	1.75	Instructor-Led
Workplace skills	Valuing Diversity	1.00	Instructor-Led
Workplace skills	Managing Conflict in the Workplace	3.00	Instructor-Led
Workplace skills	Sharing and Receiving Feedback	1.00	Instructor-Led
Workplace skills	Developing your Professional Presence	1.50	Instructor-Led
Workplace skills	Meeting Etiquette	1.00	Instructor-Led
Workplace skills	Integrity	1.00	Instructor-Led
Language Skills	Communicating for Results	8.00	Instructor-Led
Computer Skills	History of Computers	1.00	Instructor-Led
Computer Skills	Fundamentals of Typing	80.00	Instructor-Led
Computer Skills	Online Typing Course	80.00	On-line
Computer Skills	File Management	2.00	Instructor-Led
Computer Skills	MS Office	60.00	Instructor-Led
Computer Skills	MS Office Advanced	24.00	Instructor-Led
Computer Skills	Principles of the Internet	6.00	Instructor-Led
Computer Skills	Staying Connected	1.00	Instructor-Led
Business Process Outsourcing	Introduction to BPO	3.00	Instructor-Led
Information Technology	Data Processing	12.00	Instructor-Led
Information Technology	System Digitization Specialist	4.00	Instructor-Led
	Total Hours	**425.75**	

See the excel curriculum file in Appendix D for more learning paths.

Appendix J – Maturity Assessment

By answering the self-assessment questions provided in the maturity model below, an organization can determine their current state of operations. After determining this baseline for operations, the next step is to identify the future state and take action to move toward this level of mastery.

Recruitment

Process	Self-Assessment Questions	Emerging (1)	Basic (2)	Advanced (3)	High Performance (4)
Develop Recruitment Strategy	• Do you have a documented recruitment process? • If so, what part of the recruitment process is working well? What part is not working effectively? • Have you defined your brand and Employee Value Proposition (EVP)? • Do you have role descriptions for recruitment employees within your organization? • Do you (employee) have the all the skills to do your job in recruitment successfully? • Do you have a recruitment strategy? • Do you understand the implications of recruitment on training? • What capabilities/ skills gaps do you have to close in order to keep your organization competitive advantage in the next 2-5 years? What happens to your organization if you don't?	• Organization has limited understanding of the implications of recruitment strategy on other talent management processes (e.g., training) • Recruiters are trained to represent the brand/EVP and act as advocates • Little consistency and clarity on roles and responsibilities • Talent forecasting is informally performed	• Organization has some fair understanding of the implications of recruitment strategy on other talent management processes (e.g., training) • Employment brand/EVP attracts good and unsolicited talent • There is awareness of roles and responsibilities • Structured talent forecasting exists and is at least 60% accurate	• Organization has fair understanding of the implications of recruitment strategy on other talent management processes (e.g., training) • Employees and recruiters proactively act as brand/EVP promoters • There is an understanding of roles and responsibilities • Structured and consistent talent forecasts are linked to overall talent strategy and sourcing strategies	• Organization has full understanding of the implications of recruitment strategy on other talent management processes (e.g., training) • Organization actively participates in and influences content and brand sentiments in the industry and social networking spaces • Structured and full knowledge of roles and responsibilities • Talent forecasting identifies critical skills gaps and strategies to close them (e.g., new markets, new criteria)

Process	Self-Assessment Questions	Emerging (1)	Basic (2)	Advanced (3)	High Performance (4)
Define competencies and requirements needed	• Do your recruiters know the required skills and experience to look for in candidates for each role? • Have you documented the competencies required for each role? • Are recruiters adequately trained to measure and evaluate the candidate based on role competencies? • Do you have job descriptions for each role?	• Competencies and requirements are not defined • Recruiters have inconsistent knowledge of skills and experience they require to hire • Job descriptions are primarily made based on "personal experiences" and are not competency/skill based descriptions	• Competencies and requirements defined for entry level jobs • Recruiters are aware of the skills and experience they require to hire but there is ad hoc usage of competencies • Some competencies and skills are documented required for some job description	• Competencies and requirements defined for all open jobs • Recruiters are aware of the skills and experience they require to hire and there is consistent usage of competencies • The majority of the competencies and skills are documented for each job description • Competencies linked to Learning	• Competencies and requirements defined for all jobs and continuously updated based on market needs • Each job description has documented competencies and skills for each job description
Determine candidate sourcing	• What sourcing channels do you use to attract people? Which channels are not considered and used? • Which previously conducted recruiting campaigns have been successful and why? • How well would you rate your recruitment campaigns done so far and why? • How satisfied are you with the quality of applicants and candidates? • Do you have a database to maintain data on candidates so that pre-qualified candidates can be matched to new roles and invited to apply? • Please list your third party recruitment partners (e.g., NGO, CBO, schools, etc.) who you work with to find talent and rate the recruitment	• Candidates are recruited through word of mouth or non-technical means • Sourcing channel practices are not centralized or controlled across the organization and as a result the total sourcing related spend is not known within the organization • Passive candidate attraction techniques are not common place • Recruiters have minimal collaboration relationship with NGOS/CBOs to source talent	• Candidates are recruited through multiple traditional channels (e.g., referrals, advertisement) • Sourcing channel practices are centralized or controlled across the organization and as a result the total sourcing related spend is known within the organization • Passive candidate attraction techniques are in place • Recruiters leverage their own network of contacts (e.g., NGOS/CBOs) to facilitate direct sourcing	• Basic candidate portal (e.g., organization website) used with effective search capabilities • All sourcing channels are reported against through each stage in the recruiting process to enable effective quality assessment per channel per stage in recruitment to enable the most cost effective and value adding to be adopted • Recruiters conduct up-front structured discussions with team and set fact-based expectations for sourcing and Time-to-Fill	• Use recruitment application to search and manage talent • Analytics continually determine optimal sourcing channels based on metrics (e.g., costs, retention, performance) • Candidates and new hires are surveyed on the sourcing channels they used in order to build a profile of sourcing habits • Passive candidate management is proactively practiced (in alignment to the Talent forecast) and the database is maintained and kept up to date through regular communication with the passive candidates

Process	Self-Assessment Questions	Emerging (1)	Basic (2)	Advanced (3)	High Performance (4)
	process and quality of candidates sourced through them.				
Conduct candidate screening	• Do you have a formalized screening process? (e.g., written template with generic organization questions) • How is feedback provided by recruiters? What is the timing to share feedback? Do they mention reasons as to why an applicant is not suitable for a role?	• There is no screening method used to filter out unsuitable candidates before they are reviewed by the recruitment team • Not all the candidates are reviewed by recruitment before they are assessed for an interview	• There is a screening method in place to filter out unsuitable candidates before they are reviewed by the recruitment team. • All candidates are reviewed by recruitment before going to the next step of interviewing	• The questions used are predominantly consistent across each competency but do not necessarily vary to effectively determine competency proficiency for a particular role • Recruiters use competency-based assessments (written, online, phone) to screen candidates	• The online or in-person screening conducted in the first phase removes a large proportion of unsuitable candidates from the process • All screening results are recorded against the candidate's record
Conduct candidate interview	• Do you operate an assessment and selection process linked to the competencies required for the role? • Are interviewers/ recruiters well prepared and ask questions directly related to the work and relevant experiences and capabilities needed to perform the job for which recruitment is being conducted? • How is feedback provided by interviewers/ recruiters? Do they mention reasons as to why a candidate is not suitable for a role?	• The organization uses ad hoc, undocumented questions that are not linked to job description or competencies	• Interviewers are trained, follow interview guides with elementary interview questions that are related to competencies • There is a lack of interview notes recorded on the candidate's record	• Interviewers are trained and follow interview guides with structured interview questions • Candidate is assessed against pre-defined competencies • Capturing interview feedback is always a time consuming process for the recruitment team and results in large numbers of candidate having no formal interview feedback against their records	• All interviewers are trained and competent in interviewing candidates • Follow interview guides with structured interview questions • Candidate is assessed against pre-defined competencies • On-demand voice and/or video interviews improve candidate access and reduce travel burden • Interview feedback for all candidates is stored within the candidate's record • Candidate feedback about their experience in the recruitment process is captured
Conduct Pre-Employment Checks	• Do you request missing application documents? • Do you conduct background/pre-employment checks?	• Perform ad hoc review of candidate's background against the organization's criteria	• Perform basic review of candidate's background and records to verify eligibility against the organization's	• Follow documented process to review candidate's background and records to verify eligibility against the	• Pre-employment checks are automated and integrated in recruitment process • Collaborate with

Process	Self-Assessment Questions	Emerging (1)	Basic (2)	Advanced (3)	High Performance (4)
	• If so, what is the process and who is involved?		criteria	organization's criteria	NGOs and CBOs to verify candidate eligibility
Select candidate (hire) and Onboard new hire	• What is the process to make a hiring decision? • Who is involved in the hiring decision? • Do you review documented feedback and/or supporting documentation from the pre-employment check to make a hiring decision? • What is the on boarding process and who owns this process? • Who coordinates day one activities for the new hire? Who introduces the new hire to the reporting manager? • Are Email IDs, Accesses, other tools required for work ready to be used by the new hire? • Do you have a buddy system in place? How effective is it? • Are candidates briefed about the company, role, and all other relevant information that is required for them to do their job from day one?	• Hiring decisions are based on candidate interviews • Conduct informal manual onboarding (ad hoc basis)	• Hiring decisions based on candidate interviews and result of requirements check • Automated onboarding for all new hires and integrated with employee/HR systems and processes	• Hiring decisions based on structured interviews that test skills set and result of requirements check • Onboarding activities (forms, administrative activities) are completed pre-start to enable a faster ramp-up	• Hiring decisions based on results of advanced selection processes (e.g., structured interviews, competencies, job profiles) • Onboarding can occur via mobile devices • Assign a "buddy' for all new hires

Training

Process	Self-Assessment Questions	Emerging (1)	Basic (2)	Advanced (3)	High Performance (4)
Establish Learning Governance	• Do you have an established learning governance process? • Do you have an established learning committee? • Is there a Learning request & approval process. • Is there a linkage between learning and business needs? • Is there a communications plan for learning? • What channels do you use to communicate updates on learning? • Does Executive sponsorship for a learning strategy exist?	• Limited, inconsistent learning governance model in place (people, process, evaluation metrics) • Limited alignment between learning function and business departments • Learning committee meetings occur rarely and on an initiative by initiative basis • Ad hoc learning requests and an inconsistent learning approval processes • Learning function planning resources distributed across business departments with no centralized oversight or consistency • Limited learning communications process or infrastructure in place • Limited executive sponsorship for a learning strategy	• Standard learning governance model in place • Strategic linkage between learning function and some business departments. • Learning committee is in place with participation of key business executive stakeholders – meet annually • Consistent approval processes link business objectives in certain areas • Learning function planning resources are aligned to specific business departments - roles are clear to all parties – quarterly checkpoints • Learning resources have a general understanding of the business department(s) they serve • Learning communications process and infrastructure in place in many areas • Executive sponsorship for learning exists but is mostly limited to the central learning organization	• Standard learning governance model in place - some data fed back for continuous improvement • Strong linkage of learning function to business objectives across the organization • Learning committee is in place with participation of key business executive stakeholders – meet twice per year. • Consistent approval processes link business objectives in the majority of areas of operations • Learning function planning resources are aligned to specific business departments – roles clear to all parties – meet every 1-2 months • The majority of learning function resources have a deep understanding of the business department(s) they serve • Learning communications process and infrastructure in place in most areas • Executive sponsorship for learning exists across the organization	• Standard learning governance model in place (people, process, evaluation metrics) – data fed back for continuous improvement • Strong linkage of learning function to business objectives across the organization • Learning committee in place with participation of key business executive stakeholders – meet quarterly • Consistent learning request and approval processes aligned with business objectives in all areas of operations and levels • Learning function planning resources aligned to specific departments – monthly checkpoints • All learning resources are experts of the business department(s) they serve • Strong learning communications process and infrastructure in place in all areas • Executive sponsorship for learning exists across the organization. A learning culture permeates all aspects of the business
Design and Development Tools	• Is there a coordinated learning strategy in place that combines both formal and social learning? • Does your organization invest	• A limited number of business units carry out their own learning strategies – most are focused on formal learning approaches • Limited investment	• The central learning organization has established a learning strategy that is leveraged by a few business units. Predominantly focused on formal learning	• A learning strategy exists that is supported by most business units. It includes both formal and social learning approaches • The organization	• A learning strategy exists that is engrained in the fabric of the organization. Formal and social learning approaches are integrated

	in technologies related to distance learning, collaboration, networking and digital workspaces? • Does your organization have a learning plan? • Has a needs assessment been conducted? • Do you have a documented process to design and develop training content? • Do you have the tools to develop training internally? • Do your resources have the opportunity to develop their training design and development skills?	in technologies related to distance learning, collaboration, networking and digital workspaces • No standard learning plan (formal and social) management process in place • No formal needs analysis conducted • Ad hoc content design/develop process • Inconsistent development tools • Resources provided with few relevant opportunities to develop skills	approaches with limited use of knowledge sharing and collaboration • The organization has invested in technologies related to distance learning, collaboration, networking and digital workspaces • Limited learning plan management process in place and inconsistently applied • Needs analysis conducted on some projects or programs but without a standard approach • Standard content design/develop process in place • A standard set of development tools exists but are not used / are not capable of supporting all required delivery options • Resources provided with some opportunities to develop key skills	continues to expand its investment in technologies related to distance learning and collaboration • Standard learning plan management process in place • Needs analysis performed on key projects or programs using a standard approach • Standard content design/develop process in place. Most key data fed back into process for continuous improvement • Standardized, development tools exist across most instructional / delivery options • Resources provided with significant opportunities to develop a broad range of skills	• All necessary technologies are in place and improved to enable both the formal and social learning strategies • Standard learning plan management process in place. All key data is fed back into process for continuous improvement • Rigorous needs analysis done on all learning programs using standard approach • Standard content design/develop process in place. All key data fed back into process for continuous improvement • Standardized, development tools across all instructional / delivery options • Resources provided with opportunities to develop a broad range of deep skills
Deliver Training	• Does your organization have a standard session and facilities evaluation/metrics in place • Does your organization have a standard scheduling and materials fulfillment process in place? • How are your training requests scheduled? • Does your organization have a standard course implementation/roll out approach • Does your organization have a standard logistics management process for training events? • Does your	• Inconsistent session and facilities evaluation/metrics in place • Scheduling and materials fulfillment process is in place but it's both manually intensive and not consistently adhered to • Less than half of scheduling requests are at the last minute (less than 5-10 day lead time) • Ad-hoc implementation/ rollout approach • Standard logistics management process in place – manual - inconsistently applied	• Standard session and facilities evaluation/metrics in place • Standard scheduling and materials fulfillment processes in place – consistently adhered to – parts are manual • Most scheduling requests allow 2-4 weeks lead time • Standard training logistics process is managed consistently for key programs. Majority of effort manual • Documented course implementation/rollout approach, applied across most curricula • Some technology used for tracking and management of facilities – not	• Standard session and facilities evaluation/metrics in place. Limited data fed back for continuous improvement • Standard scheduling and materials fulfillment process in place with little integration with workforce management processes • Most scheduling requests allow 1-2 months lead time • Formal, documented course implementation/rollout approach, consistently applied across most curricula • Dedicated learning spaces with standard learning technology	• Standard session and facilities evaluation/metrics in place. All key data fed back into process for continuous improvement • Rigorous adherence to a standard scheduling and materials fulfillment process that integrates with workforce management processes in LATS. • Learner needs dictate course schedule • Most scheduling requests provide over 2 months lead time • Standard training logistics process managed consistently for all programs, effort is automated • Dedicated learning spaces with cutting

	organization have a dedicated space for learning? • Does learning take place during off hours at workspace? • How do you rate the quality of training delivery? Is it consistent?		integrated with other systems • Consistent delivery types, methods and tools across the organization • Instruction capability focused on classroom venues with limited virtual classroom capability • Quality of delivery is consistent for key programs	(white boards, projection units, LAN/internet connectivity, etc.) • Some technology used for tracking and management of facilities – integrated with other systems Focused session and facilities planning and management team ensuring the readiness of learning venue/space • Standard process for confirming course completion on a participant by participant basis, process semi-manual. • Blended physical and virtual methods available, but not fully leveraged • Instruction capability includes both in-person classroom and virtual classrooms with limited interactivity • Quality of delivery is consistent for the majority of programs	edge learning technology (e.g. simulated learning environments) • Facilities tracked, managed, and integrated in LATS • Shared services resources are focused on all aspects of session and facilities planning and management, with departmental exceptions as appropriate • Standard process for confirming course completion by a participant on LATS • Blended physical and virtual methods available, fully leveraged • Instruction capability includes both in-person classroom and fully interactive virtual classroom. Highly interactive and media intensive self-paced learning available • Quality of delivery is consistent for all programs
Administer and Track Learning	• Does the organization have a standard learner tracking process evaluation/metrics in place? • Does the organization have a learner scheduling and enrollment technology in place? • Does the organization have a scheduling, enrollment and tracking tools (manual or otherwise)? • Does the organization have a reporting and/or communication related to course scheduling,	• Limited learner tracking process evaluation/metrics in place. Process is inconsistently applied • Learner scheduling and tracking resources distributed across business departments with no centralized oversight or consistency • Manual, and time intensive, learner scheduling and enrollment • Limited reporting and/or communication related to course scheduling, enrollment and completion status.	• Standard learner tracking process evaluation/metrics in place • Learner scheduling and tracking resources distributed across business departments with some centralized functions but inconsistent approaches • LATS in place that supports learner scheduling, enrollment and tracking. May or may not be organization wide • Course scheduling, enrollment and completion communications managed by individual departments. Mix of	• Standard learner tracking process evaluation/metrics in place. Limited data fed back for continuous process improvement • Automated learner scheduling and enrollment processes in LATS that are shared across departments. Limited self-registration opportunities • LATS in place that supports learner scheduling, enrollment and tracking and is integrated with some other learning processes (e.g. delivery planning &	• Standard learner tracking process evaluation/metrics in place. All key data fed back for continuous process improvement • Automated learner scheduling and enrollment processes in LATS Allow for both self and group registration by training administrators, learners, learners' managers, etc. • LATS in place that supports scheduling, enrollment, tracking and fully integrated with all learning processes • Standardized and fully centralized training

	enrollment and completion status?	Manual in nature	manual and automated tools/processes	execution. Materials fulfillment, etc.) • Some course scheduling, enrollment and completion communications are managed by departments but the majority are managed centrally and follow a standardized process and toolset	communications process and tools related to course scheduling, enrollment and completion
Evaluate employee course completion	• Does the organization have a pre/post assessment capability in place? • Does the organization evaluate training?	• No pre-assessment capability in place • No Level 1 (learner reaction)/ or level 2 (learning knowledge) measurement • Manual recording of Level 1 and Level 2 data	• Some learner transcripts are available, outlining key learning courses completed. Transcripts not available for all learners • Ad-hoc/limited Level 1 (learner reaction)/Level 2 (learning knowledge) measurement (Example: Only level one measurement completed routinely)	• Learner transcripts available outlining completed learning courses for all learners • Level 1 & 2 data captured in electronic format in an LATS and completed for all programs. Majority of reporting occurs electronically • Level 3 manual or automated depending on data source and method of collection. Tools available to link LATS data and stakeholder data for analytics to determine Level 3/4 outcomes	• Learner transcripts available outlining completed learning courses and required learning. Consistent approach • Levels 1-4 assessments are completed as required. Levels 3-5 as needed • Centralized LATS providing standardized, consistent, automated measurement and reporting • Learning function measurement strategy documented and in place – consistently applied • All aspects of learning investment tracked and monitored
Certify Job Readiness	• Does the organization have a certified programs or Job Readiness Certification?	• No certification capability in place.	• Limited certification exists on a few courses	• Certification in place for the majority of courses/curricula	• Certification capability in place with the ability to obtain certification on additional courses based on existing learner

Impact Measurement

Success Factor	Self-Assessment Questions	Emerging (1)	Basic (2)	Advanced (3)	High Performance (4)
Clearly defined drivers	• Does your organization have clearly defined strategic drivers?	• Mission, purpose, goals, objectives are not defined	• Mission, purpose, goals, objectives are defined without framework or tool assistance	• Use of LogFrame or similar tool for defining mission, purpose, goals, objectives • Ad-hoc review of alignment between mission, objectives, and indicators	• Use of LogFrame or similar tool for defining mission, purpose, goals, objectives • Consistent review of alignment between mission, objectives, and indicators
Unified Implementation	• Is there complete buy-in and awareness throughout your organization of your approach to measure impact?	• Processes are non-standardized • No industry frameworks or tools applied including LogFrame, indicator catalog, and Balanced Scorecard	• Few standard processes • Awareness of industry standard frameworks or tools throughout organization even if not applied • Scarce use of LogFrame, indicator catalog, and Balanced Scorecard	• Standard processes throughout organization but not documented • Industry frameworks applied • Awareness of LogFrame, indicator catalog, and Balanced Scorecard across organization	• Standard and documented and processes • Industry frameworks or tools applied • LogFrame, indicator catalog, and Balanced Scorecard implemented throughout organization
Effective data analysis	• Does your organization have the capacity and capability to perform rigorous data analysis?	• Analysis largely subjective, based on observation or anecdotal information	• Analysis largely subjective, based on observation or anecdotal information • Individual impacts are measured	• Analysis largely objective but includes subjective evaluation • Individual, Family impacts are measured	• Analysis largely objective but includes subjective evaluation • Real-time reporting capability • Individual, Family, and Community impacts are measured
Ability to Scale	• Does your organization have the ability to scale Impact Measurement?	• No collaboration with CBOs and NGOs • No dedicated Impact Measurement resource • No feedback mechanisms in place for stakeholders	• No collaboration with CBOs and NGOs in field • No dedicated Impact Measurement resource (time split among other responsibilities) • Feedback mechanisms in place for some stakeholders	• Collaboration with CBOs and NGOs in field • Part-time dedicated Impact Measurement Resource • Continuous process improvement culture • Feedback mechanisms in place for most stakeholders	• Integration with CBOs, and NGOs in field • Dedicated Impact Measurement Resource(s) • Continuous process improvement culture • Feedback mechanisms in place for all stakeholders
Tools leveraged	• Does your organization leverage tools to measure impact?	• None	• Tools primarily developed in-house • Basic solutions used (e.g. MS Word, Excel)	• Tools both developed in-house or packaged solutions with little customization • Advanced solutions used (e.g. SQL Database, Web interface, Reporting)	• Tools primarily packaged solutions that may be customized • Sophisticated solutions used (e.g. Dev Results, Newdea, Social Solutions)

Appendix K –Logical Framework, Indicator Catalog, and Balanced Scorecard Examples

Impact_Measuremen
t_Logical_Framework_

Impact_Measuremen
t_Indicator_Catalog_

Impact_Measuremen
t_Balanced_Scorecar