

**‘Bridging the Gap’: How corporate employee-based development initiatives can be leveraged to reduce poverty and promote economic empowerment**



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# **‘Bridging the Gap’: How corporate employee-based development initiatives can be leveraged to reduce poverty and promote economic empowerment**

## **An impact evaluation of IBM’s Corporate Service Corps work with VSO in the Indian cities of Varanasi and Bangalore**

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## Executive Summary

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### Introduction

In May and June 2016, fieldwork was conducted with two partner organisations that had received IBM employees through their Corporate Service Corps (CSC) initiative which was delivered through VSO. The two organisations were the Samarthanam Trust for the Disabled based in Bangalore and the Human Welfare Association (HWA) in Varanasi, both of which received three IBM employees on one-month placements during 2015.

### Key Findings

In both Varanasi and Bangalore, the evaluation found significant evidence that IBM participants had made **critical contributions to positive development impacts**. Overall, solutions were **collaboratively designed and implemented** to address **clearly identified development issues**. Particular successes included the formulation and roll out of a financial management tool for **women's self-help groups (SHGs)** that was contributing to **increased economic empowerment and independence** and the production of a business expansion strategy that was enabling the expansion of the partner's operations in giving **livelihood opportunities to unemployed women, youth and people with disabilities**.

Beyond the impact of key deliverables, IBMers made important contributions in **two other particular ways**. Firstly, there were **unexpected changes** that resulted from the key deliverables and partnership with IBM and VSO. For example, the financial management tool for SHGs not only improved their internal governance but IBM's involvement brought **credibility and legitimacy** that greatly helped members when negotiating to open accounts with banks. The **prestige** associated with working with organisations such as IBM and VSO was identified as a positive influence in **inspiring change**.

Secondly, IBMers made a valuable contribution through the **ways they worked**. By choosing to work alongside counterparts in partner organisations, showing sensitivity to cultural practices and values and displaying a human touch, they helped to build **solidarity and trust**. These positive relationships greatly assisted **skill transfer**, the development and introduction of **new ideas** and the levels of **staff motivation** in partner organisations.

In terms of **sustainability**, the research found encouraging evidence of **long-term impact**. Self-help groups in communities were still using the financial management tool nine months after the IBMers had visited. Whilst staff in Bangalore noted how, over twelve months later, the IBM expansion plan had led to a step-change in organisational mind-set – as one staff member commented, **"IBM initiated this change in thinking"**.

**Placement and programme design** was critical to success. The research found good alignment of strategic objectives across IBM, VSO and partner organisations and placement objectives were generally well-defined and relevant. Placement length of approximately four weeks was adequate although there were some requests for slightly longer durations. What emerged as more important was striking the right balance between placement length and the scope of objectives, the expectations of host organisations and ensuring effective pre-placement orientation in order to maximise time in-country.

The research found encouraging evidence that the individual IBM cycles were being **integrated** into a more holistic and **systemic programming approach**. Through VSO India's broader strategy and engagement with government and other partners, the IBM CSC cycles were found to have contributed to building relations for influencing change at other levels. Acting as a **catalyst** between corporate and local development partners as well as **integrating projects into more strategic programming** approaches were found to be key areas where facilitating organisations such as VSO can add value.

The evaluation encountered **varying perceptions** surrounding whether the IBMers were pro bono consultants or corporate volunteers. However, components of both appeared to help in building an **effective platform** and **working relationships**. For example, being paid IBM employees helped in **gaining respect** and avoiding some negative locally-held views of some types of volunteering. But, having **voluntarily participated** in the CSC scheme meant that motivations of the IBMers were perceived more positively by local staff which led to more **trusting working relationships** that went beyond what would be expected between client and consultant.

### Areas for improvement

The evaluation encountered three main areas for improvement:

- i. In some instances, interventions would have benefitted from a fuller understanding of national and particularly **local development contexts and processes**. For example, some work in value chains was very broad and it is likely that it would have been more effective if it were more targeted. A detailed value chain analysis in this case would have been useful. Similarly, the research found that in the case of the financial management tool for self-help groups, the positive results were enhanced by the initiative of a national bank offering micro-credit. This was a chance coincidence that could have been planned for and incorporated into the project design with better context analysis.
- ii. An issue does exist over the degree to which such initiatives are driven by the **needs of local development partners**. This is particularly challenging when CSC participants are selected before partners and projects. The research found the use of the **team-based model** to be an effective **mitigation strategy** as it enables a **flexible mix of skills** to be incorporated into placement teams. However, it remains an important issue that requires constant consideration in project design and implementation.
- iii. Integrating **gender and social inclusion** into projects and programmes needs to be given **greater emphasis**. Equal participation in a project does not guarantee equality of outcome if underlying power dynamics are not addressed. For example, within a value chain that involves men and women, increasing production and profitability does not automatically promote gender equity if women are playing low value-add and/or secondary roles within the production process.

### Key recommendations

1. The design of interventions needs to be informed by a **robust evidence base**. If this evidence does not exist, then there is significant potential for corporate employees or volunteers to play critical roles in undertaking the research and analysis, which could in turn inform future work and placements.
2. Project deliverables need to be designed around **identified and evidence-based needs** as well as what is practically possible within the placement window. This requires **deeper engagement with local and national development contexts** and, potentially, greater collaboration with other development actors in order to develop mutually supportive and **complementary interventions**.
3. Both IBM CSC and VSO are committed to promoting gender and social inclusion wherever possible. However, for an intervention to be considered truly gender-sensitive it needs to do more than simply involve or focus on women. As a priority, issues and dynamics relating to **gender and social inclusion** need to be thoroughly understood and **put at the heart of intervention design and implementation**.
4. **Placement length** on its own is arbitrary. It is more important that serious consideration is given to the balance between placement length and other factors such as the scope of project objectives, the expectations of partner organisations and the motivations of participants in the scheme.
5. The **pre-placement orientation process** should be seen as crucial to maximising time spent on placement. This should include activities such as facilitating initial discussions between participants and partner organisations, sharing relevant documentation and awareness raising on professional and cultural contexts.
6. Significant potential exists to **increase the impact** of such schemes beyond individual partner organisations, by adopting a more **integrated, systemic and programmatic approach** to bringing about change. Rather than standalone cycles, placements should be seen from longer-term perspectives and linked together – potentially across different employee-based volunteer schemes and other development interventions. Facilitating and brokering organisations such as VSO have a potentially key role to play in managing this process.



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## Introduction

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In May and June 2016, as part of a series of impact evaluations of VSO's corporate employee-based volunteering interventions, fieldwork was conducted with two partner organisations that had received IBM employees in 2015 through their Corporate Service Corps (CSC) initiative. These volunteer-receiving partner organisations formed the basis of two case studies which are presented in this report.

The two organisations were taken from two consecutive cycles of the IBM CSC scheme – one that received IBM employees on a one-month placement in February/March 2015 and the other in September/October 2015. Both CSC cycles were delivered through VSO via a combination of in-country logistical and programming support from the VSO India office and VSO International's dedicated team that facilitates corporate employee-based volunteering.

The purpose of the evaluation in India was twofold. Firstly, to investigate the contribution of IBM CSC participants to VSO-identified partner organisations and any resultant development outcomes. Secondly, to develop the sector-wide evidence base and approach to understanding the role of employee-based corporate social responsibility schemes in bringing about positive development outcomes. To achieve this, the evaluation sought to explore how positive and negative associations with volunteerism affected outcomes and processes of change. It also aimed to identify good practice in deploying corporate volunteers in longer-term development programming.

To achieve this, the evaluation was structured around two research questions:

- i. In the context of the IBM CSC interventions in Varanasi and Bangalore, to what extent did the work of the CSC participants contribute to positive sustainable change for whom and how?
- ii. What can VSO learn from the IBM CSC project to further improve corporate volunteering and employee-based interventions and programming more widely?

These questions are all the more relevant in India, where there is increasing potential to leverage the skills and expertise of corporate employees as part of corporate social responsibility (CSR) commitments. One major reason for this has been a recent change in company law that now requires all businesses with revenues over a specific size to use 2% of their net profits on CSR initiatives. Within this context, there are

opportunities for facilitating organisations and corporate employees participating in CSR schemes to help in ‘bridging the gap’ between corporate businesses, smaller development organisations and the marginalised communities they work with.

### **A brief note on terminology**

In conducting the evaluation it is worth briefly noting the differences in terminology used in relation to the IBM CSC initiative and its participants, who are frequently referred to in shorthand as ‘IBMers’. From IBM’s perspective, CSC participants are very much viewed as pro bono consultants, especially as they continue to receive their IBM salaries whilst taking part. However, for VSO with a lengthy history in working with professionally skilled volunteers, ‘IBMers’ and the CSC initiative share many similarities with employee-based corporate volunteering schemes. Interestingly, as the report will discuss, partner organisations adopted a more fluid understanding whereby the consultant nature of the ‘IBMers’ garnered respect whilst their voluntary participation in the CSC scheme helped to build positive relationships that were seen as going beyond the client-consultant dynamic. The example reveals the complexity of factors surrounding the grey areas between volunteering and paid work – factors that need to be understood in relation to their specific contexts and in terms of how volunteers/paid employees self-identify and how they are perceived by those they interact with. For the purposes of this report, the term IBMers or CSC participants will generally be used to refer to the IBM pro bono consultants or employee-based volunteers, depending on your perspective. However, specific sections in the findings will analyse the significance of the voluntary aspect of taking part in the CSC scheme to the change process within partner organisations.

## **Background to the lead organisations involved**

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### **i. VSO International and Knowledge Exchange**

VSO is the leading international development organisation working through volunteers to fight poverty. By enabling people and communities to play a more active role in development, volunteering provides the means through which the essential preconditions for sustainable change – ownership, participation, empowerment and inclusion – can be realised. VSO works where it believes it can make the most difference in fighting poverty. In 2016, it is working in 23 countries with 595 partner organisations.

Knowledge Exchange is VSO’s corporate employee volunteering offer. It works in partnership with the private sector and leading international development organisations to enable new collaborations around development issues. Through Knowledge Exchange VSO ensures that corporate skills-based volunteering is a focus for lasting impact on both international development and business goals. VSO has been in the forefront of collaboration with the private sector through its partnerships with companies like IBM. These have brought innovation through applying the skills of corporate volunteers to development programmes.

### **ii. VSO India**

VSO India is a knowledge partner for civil society, government and the private sector to innovate, incubate and scale development initiatives.

It works towards poverty alleviation through strategic initiatives in the areas of inclusive education, secure livelihoods, youth engagement and improving access to services for poor people. These initiatives make strategic use of a range of types of volunteers to bring about positive development outcomes with an emphasis on facilitating system-wide change.

"Innovation, Incubation, Scale" is VSO India's strategy to achieve its development goals in India. Harnessing the potential of corporate volunteers is core to the systemic programming approach of the organisation.

**iii. The IBM Corporate Service Corps (CSC)**

IBM's Corporate Service Corps (CSC) programme groups IBMers from all over the world into multi-cultural, cross-functional, pro bono consulting teams that deploy for month-long assignments to assist local host organisations. The teams – consisting of consultants, researchers and marketers amongst others – work alongside educational institutions, government agencies and NGOs on projects varying from upgrading educational technology to consulting on the best ways to improve water quality. Based on a methodical, problem-solving and client-focused IBM work process, the teams then suggest recommendations to maximize the project's impact. The scheme also aims to build the capacity of host organisations and provide them with a level of credibility through working with IBM that will enable them to cultivate influential partners and donors and increase their reach and resources. Each CSC team has a market value of at least \$400K.

**iv. The partnership between IBM CSC and VSO**

In 2014, VSO began working with IBM for the first time to deliver IBM Corporate Service Corps (CSC) programme projects in Nigeria, China and India. The relationship with IBM International is managed by the VSO International Senior Private Sector Engagement Manager and in India by the Senior Programme Manager, VSO India. The first cycle of IBM CSC supported through VSO undertook placements in Varanasi in February/March 2015, after which the second cycle went to Bangalore in September/October 2015. The subsequent cycle went to Mysore with planned cycles for Indore and Jaipur. In each cycle in India, approximately 12 IBMers from across IBM's global workforce come together to support a number of local partner organisations; typically this involves sub-dividing into groups of 3-4 IBMers with each group taking responsibility for supporting a specific local partner.

**v. The Varanasi and Bangalore local partner organisations**

In Varanasi the CSC cycle worked with the Human Welfare Association (HWA). HWA was founded in 1991 and works in a number of areas including the support of artisan craftspeople in the Varanasi region and women's self-help groups (SHGs)<sup>1</sup>. Recently it has undertaken a significant amount of work on gaining Geographical Indication (GI) Registration for a range of traditional Varanasi crafts and trades.

In Bangalore, IBMers worked with the Samarthanam Trust for the Disabled. Samarthanam's mission is to "empower visually impaired, disabled and underprivileged people through developmental initiatives focusing on educational, social, cultural and technological aspects" (Samarthanam website). The organisation does this by providing accommodation, nutritious food, vocational training and placement based rehabilitation to enable people to achieve personal independence<sup>2</sup>.

Since June 2011, Samarthanam has been running a Business Process Outsourcing (BPO) organisation (frequently referred to as a call centre) called Samarthanam Kirana Information Technology Solutions (SKITS). It is often more simply called the Kirana BPO. This BPO places particular focus on employing people with disabilities and rural youths aged 18-35 years of age and especially women. The BPO,

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<sup>1</sup> For more information, visit the Human Welfare Association website: <http://hwavaranasi.in/> [Accessed 24/10/16].

<sup>2</sup> For more information, visit the Samarthanam website at: <http://www.samarthanam.org/> [Accessed 24/10/16].

which has the capacity for 200 agents, includes data processing, voice based telemarketing and sales marketing.

## Research Methodology

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The work of VSO and IBM with the Samarthanam organisation in Bangalore and Human Welfare Association (HWA) in Varanasi formed two distinct case studies. These are analysed separately under the findings section of this report with key learning from both discussed in the conclusions. Importantly the cases were deliberately selected (purposively sampled) because they were considered as representing successful cases that could reveal useful learning for improving future interventions. It should therefore be noted that the cases are in no way representative of the wider VSO/IBM CSC interventions; instead they are in-depth investigations to better understand the change process and extent to which the interventions were successful in their specific contexts.

Methodologically, the research embraced principles of a ‘realist evaluation’ approach. Realist evaluation adopts a multi-faceted approach in seeking to explain why change happens; it therefore asks not ‘what works?’ or ‘does the project work?’ but instead asks “what works, for whom, in what respects, to what extent, in what contexts and how?” (Pawson and Tilley, 2004).

Realist evaluation is an overarching research methodology and is method-neutral; in other words, it does not dictate the use of specific data collection methods or tools. As such the research adopted a mixed method approach, utilising both qualitative and quantitative methods where their use was most appropriate. The active participation of stakeholders, particularly primary actors, was a central consideration in the development of the research design and choice of methods. Tools and approaches including participatory process evaluation, semi-structured interviews, focus group discussions and interactive timelines were used to how change happened.

Over the course of the two case studies, nearly one hundred people were involved in the research process. These included primary actors living in poverty, IBM CSC participants, staff and volunteers from the partner organisations and staff from VSO. This enabled the triangulation of research findings across multiple groups of stakeholders.

The research was also informed by a detailed terms of reference and VSO’s evidence principles which place emphasis on ensuring voice and inclusion, robustly exploring contribution, methodological rigour and a commitment to transparency. A detailed account of the research methodology, research questions and methods along with reflections on the research process and limitations is available as a technical annex to this report.

## Research findings

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Each of the two case studies will be presented in turn, starting with the Human Welfare in Varanasi and followed by the Samarthanam Trust for the Disabled (henceforth referred to as Samarthanam) in Bangalore. In each case, research questions will be addressed under the four sub-sections of project design, project delivery, outcomes and impact, and sustainability. Key learning will be outlined throughout the report with a final concluding section highlighting key cross-case study learning and recommendations for future improvement. In accordance with VSO’s evidence principles, specific attention will be given to the perspectives and needs of the poorest and most marginalised (with a particular focus on VSO’s core approach area of social inclusion and gender), the triangulation of data across multiple perspectives and the exploration of alternative and contributory factors in line with a realist evaluation approach.



## Case study 1: The Human Welfare Association (HWA) in Varanasi

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### Programme design: the relevance and appropriateness of the partnership and project focus

In September 2015, three IBM CSC participants spent four weeks in Varanasi with local partner organisation, the Human Welfare Association (HWA). They formed part of a larger cadre of nine IBMers that worked in local partner organisations across Varanasi over the same time period. During their four week placement, they worked on two distinct areas of HWA work – the financial management system of women’s Self-Help Groups (SHGs) and the branding and marketing strategy of artisans working across seven crafts including weaving, pottery, lacquer-ware and rug-making. Over the course of the evaluation, questions were asked to HWA staff, VSO staff, and CSC participants as well as primary actors including artisan craftspeople and members of self-help groups regarding the relevance and appropriateness of the partnership between HWA/VSO/IBM, the identification of focus areas for activities and the design of the intervention.

#### i. Partner selection and alignment of strategic aims

Overall HWA appeared to be a good choice as a local partner to host IBM CSC participants. The organisation has been operating since 1991 with a long history of implementing projects funded by national and international donors. Its organisational mission is to empower the most disadvantaged sections of society with interventions primarily focused on socio-economic development and livelihood opportunities, which aligns with the strategic aims of VSO India and IBM. From 2001-10, HWA was the implementing partner of a DFID funded project to strengthen women’s SHGs; its ability to deliver on such a project being indicative of having the necessary level of organisational competency and infrastructure to make the most of the technical skills of short-term corporate placements. HWA’s work through a range of grass-roots projects also provided an opportunity for IBM CSC participants to have a more ‘immersive’ experience as they could engage directly with craftspeople and those living in local communities.

A key component in selecting appropriate partners is ensuring not only alignment of strategic priorities but also that they are similarly committed to the type of intervention – in this case, short-term professional placements as opposed to purely monetary funding for example. Here the evaluation found encouraging evidence that the programme design was appropriate to the context of the partner organisation. As the General Secretary of HWA stated, “the sharing of knowledge is much more important than the money... if we are enriched by the knowledge then we can get funds from other sources”. This consensus on the value of the programme’s use of IBM employees voluntarily taking part in the scheme was found to be a significant factor in laying the foundation for productive working relationships between the CSC team and the partner organisation.

**Key Learning:** Partner organisations need to have the capacity and competency to make effective use of short-term professional placements, whether they be volunteers or pro bono consultants. This further needs to be complemented by alignment of strategic aims and priorities as well as a shared understanding of what volunteering and/or consultancy can offer as an intervention over others such as direct funding.

#### ii. The CSC participant and partner matching process

The evaluation sought to better understand the process by which partners were identified and how IBMers (within the IBM team model) were then assigned to them. By doing so, the research assessed the degree to which the partner organisation received CSC members with the skills that were most appropriate and relevant to its needs.

Broadly, three key stages in the overall process were identified. Firstly, IBM CSC invites bids to deliver the programme in a city that it specifies. Secondly, VSO finds suitable partners in that city and then submits a bid. Thirdly, if successful, VSO works with the partners and IBM to develop appropriate placement descriptions and objectives, and matches the CSC participants selected by IBM.

This process appears to have been effective in the case of HWA. However, a number of questions did arise in relation to wider appropriateness and replication. Firstly, VSO had no prior history of working in Varanasi which raised an issue around whether the project aligned with wider strategic VSO objectives (particularly in terms of its plans for expanding the geographical reach of its operations). However, VSO staff confirmed that Varanasi was a geographical area the organisation was looking to expand into and so the IBM programme gave them an opportunity to establish a presence there. A second question revolved around the inherent risk in finding and working with new partners. To counter this, VSO conducted a prior programme and financial assessment as well as reference check of potential Varanasi partners. In the case of HWA, this process led to its successful selection as a partner.

One potentially challenging component of the matching process is the alignment of participant skills to the needs of partner organisations. In the case of IBM CSC, the staffing of teams is done prior to organisations and projects being identified which means the risk of a misalignment between available skills and development needs has to be managed. One way in which this is mitigated against is through the deliberate use of CSC teams with a mix of skill sets, gender, geographic representation and tenure, and experience. This mix within each team is designed to be able to tackle most projects through their skill sets as well as the considerable network of resources available to them within IBM. The matching process also adopts an iterative process to ensure a better alignment of skills to needs. So once the team members have been confirmed by IBM, they submit a CV to the NGO partner so that as host organisations and projects are being scoped, the NGO partner knows the skill sets and experience of the team members. Through dialogue with VSO and IBM CSC participants, appropriate placement objectives can thus be put in place.

**Key Learning:** The matching process goes beyond finding alignment of strategic priorities across corporate partners (IBM), facilitating agencies (VSO) and partner organisations (HWA). A key component of this is having processes in place that either directly recruit participants with the right skills to meet the development needs of partner organisations or, at the least, minimise the risk of mismatches occurring. With CSC selection taking place before host organisations and projects are identified, ensuring a balance of skill sets within a team-based model was found to be an effective mitigation strategy against misalignments between available skills and development needs. Involving host organisations in an iterative dialogue in devising placement objectives was also welcomed as a practical way of increasing the relevance to local development organisations.

### iii. **VSO's role in the programme**

VSO International and VSO India provided a range of support throughout the process. They were responsible for identifying HWA as an appropriate partner and in facilitating the ongoing discussions that shaped the placement description and scope of work. Once in-country, VSO played a key logistical role in arranging flights, accommodation, and translation services. A member of staff chaperoned the IBM team throughout the placement, addressing issues as they arose. Interviews with IBMers revealed a high level of satisfaction with the service provided – having the personal touch of someone on-hand was singled out for particular praise.

HWA also highlighted the essential linking and brokering role of VSO in the process. When asked what the reaction would have been if IBM had approached HWA directly, the general secretary emphasized

that they would have had doubts because the motivations of IBM would not have been clear. As he stated, “we don’t know if IBM is working in the development sector or not, but we know about VSO”.

It appears that VSO’s role was influential in acting as a respected mediator between the worlds of local community-based development and the international private sector. As the HWA’s general secretary further highlighted, “VSO has created a platform for understanding between HWA and IBM volunteers, from planning to implementation, and beyond implementation also”.

Despite not working in Varanasi previously, VSO’s role was seen as adding value in three distinct ways. Firstly, by identifying HWA as an appropriate partner based upon their alignment of strategic priorities with those of VSO and IBM CSC. Secondly, by building shared understanding on the CSC approach and value of volunteering as the intervention’s means of delivery. And thirdly, through the provision of tailored logistical support to the IBM CSC team, based upon a better understanding of the needs of international corporate placements – informed by a long history of volunteer management – than would necessarily be expected of the local partner organisation.

**Key learning:** Findings suggest that in brokering relationships between organisations of vastly different levels of capacity and/or which work in different sectors, there is a potentially significant role to be played by specialist and trusted facilitating actors or organisations. This bridging role can also apply to providing appropriate logistical support that is informed by an awareness of the cultural sensitivities of placing volunteers in non-familiar surroundings. Bringing and sharing expertise on how volunteering can add value as an intervention is a further area that facilitating organisations can make a specific contribution towards.

#### iv. Length of placement

The three IBM CSC participants placed at HWA were in-country for four weeks; they formed part of a team-based approach with their fellow IBM colleagues placed at other host organisations in Varanasi. In comparison with some long-term volunteer placements organised by VSO – which can be up to two years in duration – the IBM placements were relatively short though not unusually so when compared to other employee-based volunteer and consultant schemes.

Most obviously, the length of placement directly affects the human resource available to undertake activities and achieve objectives (both those set beforehand and those that emerge during the placement). However, recent literature (Burns et al., 2015) has also emphasized that longer placements may facilitate deeper integration of volunteers into the local community/partner, stronger relationship-building and the development of mutual understanding of local challenges and the skills available to tackle them.

In the case of HWA, the IBMers took practical steps to build a good working relationship with the organisation – this will be discussed further in the subsequent section on programme delivery. However, the more pertinent issue related to the balance between length of placement and the predetermined placement objectives and workload. For the development of the financial management tool for women’s SHGs, the four-week placement seemed sufficient. However, the branding and marketing strategy for seven artisan crafts placed greater strain on the limited time-resource of the CSC participants. In this latter case, the IBMers and HWA both agreed that a slightly longer placement or more focused work-plan would have been beneficial. This issue of balance between workload and length of placement was also seen to impact upon the relationship with and expectations of staff at HWA – something that will be covered in more detail under programme delivery.

Interviews with two of the three IBMers placed at HWA supported the view that the four week placement was long enough to deliver the financial management tool for SHGs but was more of a struggle for the support to artisan crafts. The CSC participant working on the branding strategy reflected that an extra two weeks would have enabled them to achieve more. However, although a six week placement may have been beneficial to the project, the IBMer highlighted that this would have been personally difficult in terms of the extra time away from their core IBM jobs and friends and family.

Staff at HWA shared similar views to the CSC team and it was generally agreed that an additional two weeks would have been useful. Interestingly, although staff could have asked for significantly longer, two weeks was seen as an acceptable extension to the placements indicating that they were aware of the IBMers' role in undertaking specific pieces of work rather than providing ongoing organisational development support. With regards to the primary actors (members of the SHGs and artisans), their engagement with the CSC team was limited to field visits. With limited interaction, their reflections tended to focus on the key deliverables of the IBMers rather than the length of the placements.

**Key Learning:** Four-week placements can be sufficient as long as the right balance is reached between placement length and workload. Critical factors in achieving this are realistic project deliverables, appropriate participant and partner expectations and support processes that seek to promote and maximise the participants' time and engagement with the local context (for example, interpretation services, training on cultural awareness, planned opportunities to interact with local staff/communities).

#### **v. Problem identification and placement activities: the need for a full value chain analysis**

At the operational level, the evaluation unearthed some concerns around the relevance of the activities the IBMers undertook and the key outputs they delivered. It is first important to acknowledge that a process was followed in identifying relevant problems and suitable activities that the CSC participants could undertake to address them. HWA confirmed that, in addition to phone conversations, key staff from VSO India visited three times to discuss the project focus. During this dialogue, the decision was taken to concentrate on the most important issues; practically this meant not doing direct fundraising but taking a more long-term capacity-building perspective by developing a branding and marketing strategy. During the evaluation, HWA demonstrated a clear understanding of some of the issues facing artisan communities such as the need to capitalise on the Geographical Indication<sup>3</sup> (GI) registration of Varanasi crafts and the challenges that resulted from the fraudulent use of the GI label as well as competition from more cheaply made machine products.

This organisational knowledge and process for deciding priorities was encouraging. However, the evaluation found that, in the case of the support to artisans, the final agreement on focus areas may not have been the most relevant to their needs. The CSC team provided training on a range of social media channels including Facebook, Instagram, Youtube, and Whatsapp. Conversations with artisans revealed that, since the training, they predominantly used Whatsapp to communicate with potential buyers. There was far less use of social media as an advertising and marketing channel to generate new business. The evaluation found that, in theory, branding for each of the seven crafts as a whole may

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<sup>3</sup> Geographical Registration (GI) is the recognition given to certain products produced in specific geographical locations (these can be villages, towns, regions, etc.). It can also certify that a product is produced using specific techniques, has particular qualities or uses certain ingredients or raw materials. GI is often granted by national governments and is given because a product has a well-regarded and recognised reputation. A popular European example is the GI certification of Champagne as sparkling wine that comes from the specific Champagne region of France.

have been valuable but practically, each individual artisan generally lacked the capacity to seriously invest time in using social media to build that brand.

This example links to a wider issue of better understanding where and how an intervention will bring about change across complex issues such as artisan value chains. The evaluation found that placement activities could have been more relevant and appropriate had they been based on a thorough understanding and analysis of the value chains they were working in. In fact, conducting such analysis could have been a key deliverable for a skilled volunteer or consultant.

Furthermore, the research found differing dynamics in each of the seven product value chains that fell within the remit of HWA's work, which raised the prospect of tailoring interventions to them. In the case of the CSC placements, efforts appear to have been made to find suitable activities that would add value across all crafts when a more focused approach may have been more appropriate, particularly given the short placement length.

**Key Learning:** Not designing an intervention based upon a thorough understanding of how it contributes to change – whether it be through a value chain analysis or theory of change – risks undermining the relevance and effectiveness of the programme. This is all the more important in short-term interventions where there is limited time to understand the context or adapt strategies/activities after the placement has started. Corporate professional volunteers and consultants provide specific skills that need to be appropriately aligned to specific needs in order to maximise impact.

#### vi. Gender and social inclusion

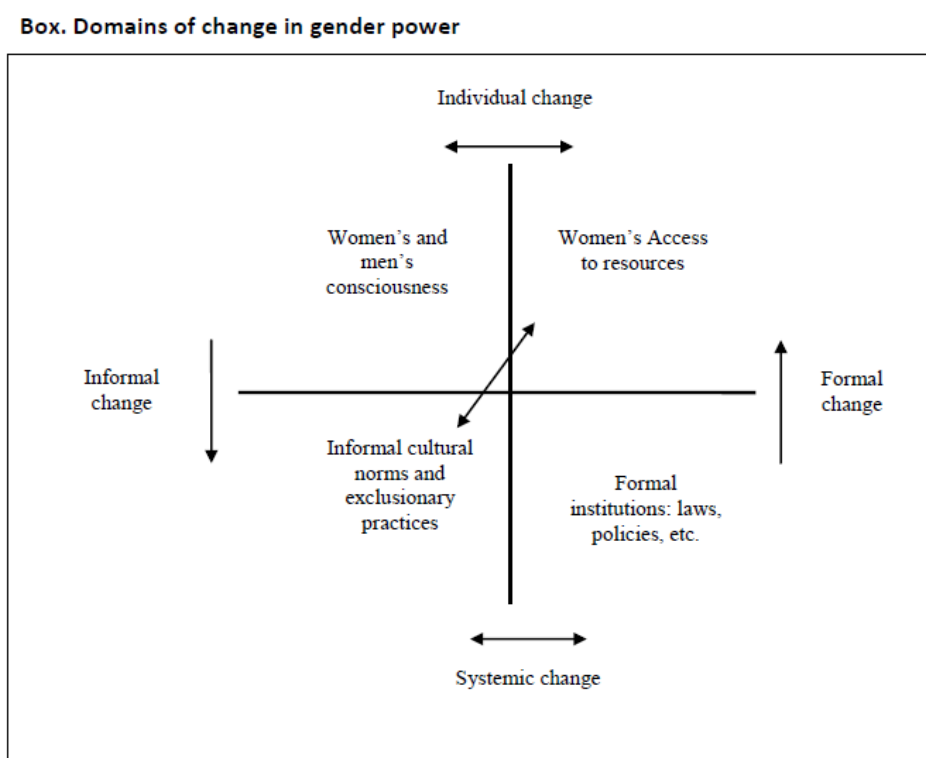
Associated with the need for a thorough value chain analysis, the evaluation found that the project would have also benefitted from an in-depth engagement with the gender context. This is not to suggest that issues surrounding gender and social inclusion were ignored in the project. For example, the decision to develop a financial management tool for the women's SHGs addressed a genuine need to increase women's economic empowerment and access to resources. However, in the cases where promoting gender equity was not explicit, more could have been done to integrate a gender-sensitive approach. One potential area for learning is through VSO's ongoing work to ensure that all project and programmes are informed by a thorough Social Exclusion and Gender Analysis.

This most applied to the work in artisan crafts where the evaluation had concerns regarding the assumptions underpinning the process by women would benefit from increased sales. In many cases, the logic for intervention was based upon increasing sales to increase income and henceforth quality of life. However, in most cases (though not all), women appeared to play a subordinate role in the production process – this was typically structured around the family unit, and in some artisan crafts, women appeared to not be undertaking the roles that added most value to products. Therefore, whilst increased sales and income may have had some positive impact on women, the intervention was seen to do little to redress unequal gender dynamics or challenge informal cultural norms, practices or individual attitudes.

When assessing the project's integration of a gender-sensitive approach, the following table by Espinosa (2013) is useful in demonstrating the relatively narrow engagement with gender issues in relation to the artisan crafts. The table below considers gender power has being defined by formal and informal, individual and systemic domains.



**Figure 1: The domains of change in gender power (taken from Espinosa, 2013)**



The support to women's SHG's directly addressed formal individual change through access to resources and indirectly addressed components of informal individual and systemic change as women felt more empowered and their role within communities was enhanced. However, work within the value chains of the artisan crafts solely addressed women's access to resources and only as a subsequent effect of increased sales and income. The evaluation found the project's assumption that increased profits would lead to women's empowerment in crafts where women played subordinate roles to be misplaced and not based on any observable evidence.

**Key Learning:** Understanding gender dynamics needs to form a core component of the project from design to implementation, with interventions tailored to bring about change that actively redress the unequal power relations that perpetuate gender inequality.

### **Project delivery – effectiveness and efficiency**

Overall, the IBM CSC team met all of the project objectives and produced the key deliverables that were required of them. HWA senior leadership and staff were highly satisfied with the service provided and the IBMers regarded their placement as a positive experience. Specifically, CSC participants noted the openness of HWA to working with them and the high standard of support provided by VSO over the course of the placement. In terms of programme delivery, the evaluation found three areas of learning for future programming.

#### **i. Activities and ways of working**

In terms of activities, the IBMers conducted several engagement and listening exercises with the SHGs and artisans to understand the nature of their businesses and the challenges they faced. They then

used this information to develop the financial management tool and branding and marketing strategy, which they presented to HWA staff and some stakeholders in a final debriefing session. In-between this, the CSC participants also ran training on the financial management tool with relevant staff from HWA and social media training with wider HWA staff as well as representatives from the artisan crafts.

More interesting were the findings that related to the ways that the CSC participants worked. One example that was mentioned by the CSC IBMers, HWA and VSO related to the decision the IBMers took on where to work. With the exception of the field visits, there had been an assumption before the placement that the CSC team would work from their hotel, where there was a dedicated space and also, with the warm temperatures, air conditioning. However, the IBMers took the decision to try and work at the partner organisation where there was an unused space on the first floor balcony.

The decision to work in this way had a significant positive effect on the morale and learning of HWA staff and is an indication that it is not only the outputs that the IBMers produce but the process by which they engage and produce them that is just as important. As the general secretary of HWA stated, “seeing is the best way of learning, doing is the best way of learning”. In working at the partner organisation, HWA staff could observe the approach and techniques that the CSC team used; it also enabled impromptu conversations and quick sense-checking between HWA staff and the IBMers. During a workshop with HWA staff, it was observed that seeing international CSC participants from a company like IBM choosing to work alongside them in the heat of the office was a big morale boost to the organisation.

The way in which the IBMers interacted with communities in a ‘soft manner’, listened to issues and managed to communicate without knowing the language was seen as inspirational by all parties from HWA staff to community members and artisans. HWA staff specifically noted the smooth facilitation skills of the IBMers which helped the process run effectively. Finally, IBM CSC participants brought a more holistic way of thinking that challenged the taken-for-granted approach of tackling issues individually. For example, support staff to the women’s SHGs highlighted how the IBMers encouraged broader thinking around multiple issues, drawing links between them and devising creative solutions, which has helped staff make the groups more relevant to local needs.

**Key Learning:** The ways in which participants in such schemes work – from engaging communities and working alongside local staff – are vitally important and arguably just as significant as the professional skills they may bring to a placement. Understanding the contribution of such ways of working to building the capacity of local partners and confidence of staff therefore needs to be built-in to any evaluation or learning processes that seek to understand change and impact.

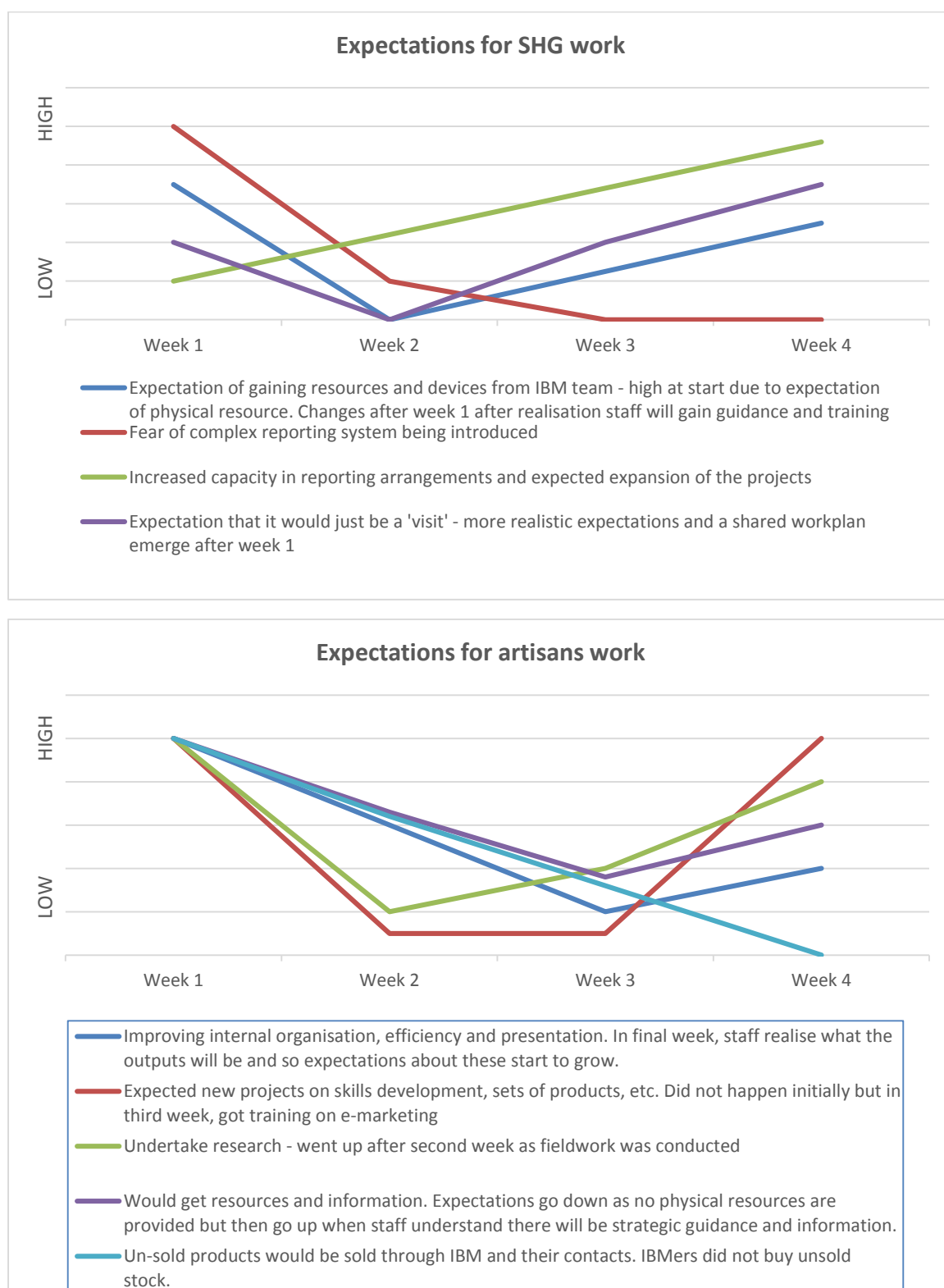
## ii. The effects of project scope on partner expectations

A workshop with HWA staff revealed the importance of engaging staff across the organisation in setting appropriate expectations of what the IBMers will do. Whilst the lead HWA contact for VSO had been involved in discussions to agree priorities and placement objectives, an exercise with staff working with SHGs and in the artisan craft showed significant variations in expectations of what the CSC team would deliver. Significantly these differences were shown to vary between the work focusing on SHGs and that supporting the artisans, with the key distinguishing factor being the scope of the work under each.

The following diagram shows graphs developed through a participatory exercise with HWA staff showing their prior expectations of the CSC participants’ work and how they changed over the course

of the four-week placement. The first relates to the CSC work undertaken on the SHGs and the second to the artisan crafts.

**Figure 2: Participatory timelines for staff expectations of CSC placement work on SHGs (top) and artisans (bottom)**



For the SHG staff, a key turning point occurred after the first week. Prior to this they had envisaged that the IBMers were simply there to do a visit and would 'come and go'. However, after the first week they realised that they were there to work with HWA. The IBMers also submitted a detailed work plan

after the first week that focused on the development of specific tools which the staff considered to be more realistic. It is noticeable that staff also had high expectations that the CSC team would bring physical resources – perhaps because they associate this with people that come for short visits – but this changed after the first week with the realisation that they would be getting training and guidance on how to use resources. Fears of the IBMers introducing an overly complex reporting system gradually faded by the end of the second week and expectations of an expansion of the project steadily increased as their perceived capacity to use a robust system improved.

For the seven artisan crafts, HWA staff had similar expectations around the provision of physical resources – they started high and gradually subsided until the end of the third week when they went up as the result of realising that the resources would be in the form of information and strategic guidance. There was also the misplaced expectation that the IBMers would buy the unused goods of the artisans. In contrast to the SHGs, staff working on the artisan crafts had high expectations on developing new skills, undertaking research and improving organisational efficiency but it is not until the end of the third week that they realised exactly what it was that the CSC participants would provide, after which they reframed their expectations.

The reason identified for this was that the IBMers working on the branding strategy for artisans had to cover seven different crafts – this meant spending the first two-and-a-half weeks conducting visits, during which time staff were unclear as to what the outputs would be. In terms of project efficiency and effectiveness, focusing on one or a couple of products (in a similar way that the work with SHGs focused purely on the financial management tool) rather than spreading more thinly across seven would potentially been a more effective use of time. The exercise also suggests that more thoroughly engaging all partner staff to manage expectations may be valuable in minimising confusion caused by unrealistic or misplaced expectations. This is likely to lay better foundations for building relationships between CSC participants and partner staff.

**Key Learning:** Engaging all staff that are likely to interact with participants in a process of setting realistic expectations is important for ensuring placements, and the relationships that emerge from them, start on the right direction. The project scope of work and/or key deliverables also need to be appropriate so that firstly, local staff do not expect more than can be delivered, and secondly, participants in the scheme are not tasked with more induction, orientation and consultations than they can practically undertake during their placement.

### iii. Support and logistics

The IBM CSC team reported being very satisfied with the logistical support provided by VSO over the course of the placement. VSO provided a dedicated member of staff who accompanied the IBM team in Varanasi and managed issues as they emerged. Minor issues in terms of support were captured such as slightly better pre-departure training and advice on cultural norms and practices. For example, one CSC participant mentioned that they were not prepared for the custom of removing shoes when entering somebody's home – if they had known then they would have brought different footwear. However, they were also keen to stress that such issues were only small and the overall support was very good.

Language and communication was mentioned by both IBMers and HWA staff. VSO provided an interpreter for the CSC team which was helpful but the IBMers still observed feeling limited in terms of how much they could communicate. This appears to have been more of an issue when communicating more informally with HWA staff. When visiting communities and holding formal meetings, the interpreter was able to assist in communication but this was less likely to happen when the IBMers

were not together as a group. The CSC team also noted that working through an interpreter was more time-consuming, something which placed extra pressure on them when working to a short four week timescale.

**Key Learning:** The time implications of working across language barriers need to be considered when designing such initiatives, particularly when placements are relatively short. Using an interpreter is one mitigating approach but attention should also be given to how working through a third-party may affect the ability of participants to build direct relationships with local staff and members of communities. To enable this, strategies to facilitate more informal interaction without the need of an interpreter could be included in pre-departure briefings or induction processes.

## Outcomes and impact

Engagement with HWA staff, artisans and members of the SHGs produced a range of evidence to support some positive impacts that the work of the IBMers, at least in part, contributed towards. The following sections will start with these positive impacts before discussing other contributing factors, unintended consequences and impacts as well as the distinct value that the voluntary aspect of participating in the CSC scheme brought to the process.

### i. Positive reported impacts

Interviews with the artisans produced a number of anecdotal stories of increased income in the time since the IBMers had undertaken their placement. An artisan in black pottery claimed to have experienced a four-fold increase in income, partly as a result of the time and money saved in visiting potential buyers. Whereas previously they may have had to travel as far as Delhi (800 km away), they could now communicate with buyers via WhatsApp. This was as a direct result of the social media training they received from the IBMers.

On another visit, a master-craftsman in lacquerware claimed a doubling of income caused partly by a reduction in travel/communication costs with buyers but also increased awareness of the product due to their presenting products at exhibitions and the recent Geographic Indication registration of the product – a process also supported by HWA. In terms of the impact of the increased income, the artisan said profits were being invested in four areas – product diversification, the hiring of better quality designers and painters, their daughter's education and on upgrading tools. In this case, the master-craftsman noted that the increase in income was also benefitting the 150 people whose livelihood was directly associated with his business. Of those 150, the master craftsman estimated that approximately 30% were women. However, it should be noted that this is self-reported data that it was not possible to verify during the course of the fieldwork.

An artisan family that does pink enamelling of metal artefacts estimated an increased income of 50% over the last year, which they noted was not as high as some other crafts due to a parallel increase in the price of their raw materials. They also reported using WhatsApp to communicate and arrange commissions with buyers as well as a rise in orders which they put down to increased publicity through the promotion of their products by HWA staff to senior politicians. Finally, a weaver master-craftsman claimed a 40-50% increase in income, which was aided by using e-mail to transfer images of products to potential buyers.

These individual stories of increased income suggest that, at least in some cases, artisan traders have seen some benefits. However, without a much broader survey of the income levels of the artisans, it is not possible to verify whether these findings are symptomatic of the wider artisan communities. As mentioned previously, it is also questionable as to whether gender equality had improved in those crafts where women do not play the dominant role in adding value in the value chain.



The research found significant variations both between and within each of the seven product value chains. For example, pink enamelling faced specific challenges around the increased price of raw materials whereas weaving encountered problems with competition from cheaply produced machine-made alternatives and the false labelling of inferior products under its GI registration. There were also important differences within the artisans in each community that made it difficult ascertaining the full impact of the IBMers' work. For example, in each trade, some master-craftsmen are well-established and respected with the result being they rarely struggle to generate business. They can often negotiate large contracts directly with buyers. However, less established artisans face greater challenges and often have to work through traders who take a cut of their profits – artisans will take lower prices from traders in return for not having to manage the risk of selling their stock. A limitation of the research is that, during the short fieldwork period, it was not possible to establish the kind of artisans that were most benefitting from the IBM CSC participants' branding and marketing strategy and social media training.

For the women's SHGs, the financial management tool was found to have had a significant positive impact. During a session with representatives of 25 SHGs in one large village, discussion emphasized four areas where there had been a positive change. Firstly, women felt more independent as a result of their membership of a SHG. Secondly, they reported having more income which was being invested to increase production and develop livelihood opportunities. Thirdly, there was less reliance on money-lenders who often charged high rates of interest and resultantly there was less exploitation. Fourthly, women reported having greater feelings of pride and self-esteem.

Importantly, the financial management tool produced by the IBMers was found to have had a positive influence on the transparency of managing the SHG accounts. This, in turn, increased trust in the functioning of the SHGs and made them more attractive to new members. In the particular village that was visited, participants noted how there had been 1 SHG in 2003 which had increased to 8 in 2015, partly as a result of a DFID-funded project that ran from 2000-10. However, since 2015, 17 new groups had formed to bring the total to 25 SHGs for the village. Participants attributed part of this dramatic increase to the improved financial management of the SHGs; indeed, it was emphasized that members still used part of their contributions to pay for management support from HWA staff, even though this was not mandatory.

**Key Learning:** The positive impact in terms of the number and functioning of women's SHGs was easier to validate. Although a more extensive interrogation of their numbers and accounting would increase confidence in the reported positive impacts, the findings from this fieldwork are certainly encouraging and indicate that an increase in quality of life was experienced by at least some of the SHG members. For the artisan craftspeople, anecdotal stories suggest some positive impacts. However, in the absence of any project/partner system to track changes in artisan income over time or gauge how income is being spent, it is not possible to ascertain how extensive positive changes have been across the large artisan communities. Such an exercise would require much more intensive and prolonged fieldwork.

## ii. Other contextual factors

Despite the positive impact of the financial management tool, it is important to consider its influence in relation to other contextual factors. In the village visited, it was found that another driving factor was the recent initiative of major national Indian bank that gave low-interest loans to SHGs as long as they had a group bank account. The increase in the number of SHGs can therefore be seen as strongly associated with the move to access the credit on offer by the bank. Nevertheless, the financial management tool provided a stepping stone to opening a bank account as SHGs had to demonstrate robust financial records. Assessing

contribution in this case becomes problematic as the intervention and context of the bank's initiative can be seen to be mutually supportive. In fact, without the change in context, the financial management tool may have been less relevant and effective.

Returning to the artisans, their production processes were seen to be influenced by complex shifts in the international economy. With regards to the specific contribution of the branding strategy and social media training, it was challenging to identify the specific impact. Certainly, some artisans appeared to be using, and potentially benefitting from, social media to communicate with buyers and thereby reduce the travel costs associated with visiting in-person. However, the recent acquisition of GI status for a number of the products, publicity amongst senior politicians and the presentation of products at national and international trade exhibitions (all processes supported by HWA), can all be regarded as having contributed to changes. It is also worth mentioning that since the IBM placement, VSO has assisted HWA in the development of a high-quality product marketing brochure for the seven artisan crafts. This was only being launched at the time of the fieldwork in June 2016 and so it was not possible to gauge its influence.

**Key learning:** Multiple contextual driving factors were identified alongside the IBM interventions as influencing change. However, rather than attempting to isolate them in the hope of establishing which made the biggest contribution, the evaluation found that many mutually supported each other – as such, they were equally significant as critical factors in bringing about positive change. For example, for the SHGs, their number would not have increased without the offer of credit from the bank but conversely, they would have not been able to access that credit without the support of the IBM financial management tool. The bank credit may have ignited a motivating mechanism but the financial tool allowed it to be realised.

### **iii. The distinct contribution of volunteerism**

The evaluation specifically investigated the distinct contribution of the IBMers in relation to their voluntary participation in the CSC scheme, which meant the initiative embraced a component of volunteerism. This was achieved by enquiring about the wider volunteer context they were working in, the ways in which they built relationships with staff at HWA and the particular ways they contributed to change.

Previous research (Burns et al., 2015) has shown that the cultural context of volunteering can have a significant impact on the effectiveness of volunteering as a development intervention; for example, how volunteers are perceived locally can affect levels of trust and the degree to which people are willing to positively engage and work with volunteers. Discussions with HWA revealed that negative views of volunteering did exist with a common stereotype being that volunteers were people who were not willing to work. Further probing found that these views had been reinforced by experiences with some volunteers undertaking student placements at HWA who had been perceived as just 'passing the time' rather than making an active contribution to the organisation. However, further discussions also highlighted how perceptions of volunteers vary dramatically according to the type of volunteer.

Despite some negative views of volunteering, HWA staff emphasized that, from the start, it was clear that the IBMers did not fall into the category of the student volunteers they had encountered. As the HWA general secretary stated, "it was clear from the first day that they were a different type of volunteer". Interestingly, in this example, the IBMers were referred to as volunteers but a clear distinction was made between them and other less well perceived types of volunteer. It was noted how the IBMers had come through a long process of scrutiny and orientation to get there and were not there as tourists. These factors appear to have contributed towards the IBMers being perceived more positively and helped them avoid some of the locally held negative views of volunteering.

It is questionable as to what extent the IBM team were seen as volunteers or paid IBM staff. Comments from HWA staff picked up on aspects of both, with the IBMers paid positions within IBM being emphasized alongside the fact they had voluntarily put themselves forward for the CSC scheme. This highlights interesting dynamics in terms of the perceptions of participants in employer-facilitated schemes that would benefit from further investigation. From a development programming perspective, such schemes may succeed in circumventing negative cultural contexts of volunteering but, it also raises interesting questions around commonly held definitions of what it means to volunteer.

The previous section on programme delivery has already discussed the ways in which the IBMers worked during their placement. However, from the perspective of volunteering as a 'relationship-based' (Lough and Matthew, 2013) development intervention, it is worth re-emphasizing how the IBM team took steps to build positive working relationships with HWA staff and local communities. Here the decision to work at the HWA office rather than the comfort of the hotel should not be underestimated; for HWA, seeing the IBMers working alongside them every day fundamentally altered the power dynamics between them so that they were placed on a more equal footing. This appears to have broken down the expert-recipient relationship barrier, with HWA staff reporting feeling more motivated and confident. As the HWA general secretary commented, there was no condescending attitude from the IBMers and there was 'simplicity in [their] behaviour'. Furthermore, the fact that staff in HWA recognised that IBMers had voluntarily put themselves forward for the CSC scheme meant they also had greater trust in their motivations for being there – something which was identified as going beyond the typical client-consultant dynamic and helped to lay the foundations for more positive working relationships.

A workshop with HWA staff and interview with the HWA general secretary focused on identifying the specific ways in which the IBMers contributed to change. This was structured around a tool – informed by the VSO/IDS Valuing Volunteering research – that uses eight different areas of change to encourage respondents to think more widely around the process of change facilitated by volunteers (Burns et al., 2015). The following bullet points provide a summary of the key ways in which the IBMers contributed to change:

- **Service quality and effectiveness** – IBMers developed a financial management tool for SHGs and provided training on social media, e-marketing, excel and financial management.
- **Inclusion** – linked to the new financial management tool, a number of new SHGs formed.
- **Innovation** – artisans and HWA staff learnt how to use new media tools and SHGs received a new Management Information System (MIS).
- **Collaboration and networking** – new market linkages have been developed and there is interaction with new traders and buyers.
- **Ownership, agency and confidence** – staff/field supervisors are more confident with the financial MIS tool. Artisans are more confident with e-marketing.
- **Participatory practice** – IBMers helped in engaging and facilitating communication on a wider range of topics with the community and SHGs.
- **Social action** – IBMers developed personal awareness
- **Inspiration** – staff were inspired by “seeing people from a big company like IBM coming and working in difficult conditions and not complaining” (HWA general secretary). IBMers modelled behaviours in interacting with staff and the community. It was also inspiring for staff to see the female IBM CSC participants interacting with men and challenging gender stereotypes.

Many of these areas of change were interconnected with some acting to strengthen the degree of change in another. For example, it was stressed that building the confidence and agency of artisans in using social media and e-marketing was also an innovation that led to increased collaboration and market linkages, which all in turn improved the service quality and effectiveness of artisans' businesses.

**Key Learning:** IBM CSC participants managed to overcome or avoid locally held negative views of volunteering. A number of factors were responsible for this including presenting themselves as professionals, being perceived as having undergone a thorough selection and training process and their reputation as representatives of IBM. The local perceptions of IBMers combined elements of being paid IBM staff but also included recognition of their voluntary participation in the CSC scheme, something which helped build trust in their motivations and positive relationships that were seen as adding value beyond the traditional client-consultant dynamic. Ultimately, the IBMers succeeded in developing productive working relationships with HWA staff that facilitated engagement and interaction on a more equal level. As well as the practical resources that they produced, such as the financial tool and marketing strategy, the IBM CSC participants also contributed to change in a range of interrelated areas including inspiring staff and making innovations like social media more accessible.

#### **iv. Unintended and unexpected changes**

The evaluation found evidence of a number of unintended and unexpected impacts that fell outside of the initial scope of work and anticipated results of the key deliverables. These can broadly be categorised under changes for SHGs, artisans, the partner HWA and other unexpected areas.

For the SHGs, an unexpected impact was the number of SHGs opening bank accounts to gain access to low-interest bank loans. The new financial management tool had played a part in enabling SHGs to do this. However, during the HWA staff workshop it was claimed that all members of the SHGs (which was estimated at 5,000) also had life insurance as a result of their engagement through the SHGs. This was tested with 50 members of SHGs during a community workshop where approximately half said they now had life insurance. Some participants who did not have life insurance explained that the yearly policy started in June and they were waiting for the start of the new policy year to sign up (payment only occurred on an annual basis with no pro rata arrangements). As the new policy year was due to start, membership of the life insurance policy was expected to increase. Although coverage was not as high as initially claimed by HWA staff, the example still highlights some of the unexpected additional benefits being experienced by members of the SHGs, the growth and functioning of which had been supported by the work of the IBM CSC team.

For the artisan communities, some evidence emerged that the training they received in social media had led to increased general web skills and increased requests and access to other state services like ration and election cards for their families. Understanding the potential of smart-phones for business use had led to artisans exploring their use for other purposes. It was not possible to ascertain the extent of these kinds of impacts across the artisan community but the individual stories do hint at some unexpected positive side effects. For one HWA staff member that also received the social media training, they reported having subsequently tweeted about a problem to their local minister and receiving a response.

An unexpected impact for HWA and also contributing factor to the process of change was the organisational prestige that came from being associated with a large well-known company such as IBM, and to a lesser but still significant extent VSO. Staff members of HWA stressed that the credibility that came from the link with the IBM brand had helped support the legitimacy of the financial management tool for the SHGs when negotiating to open accounts with banks. HWA staff also spoke of the increased motivation and self-esteem brought about by working with the IBM team. Interestingly, interviews with VSO staff revealed that this positive association also applied to its work in attracting new corporate partners.

A final unexpected impact relates to a project that emerged as an idea during the course of the IBM placement but subsequently grew into a fully-formed initiative. As part of a community engagement day for

the IBMers, HWA designed a programme of work around the idea of 'Plastic Free Villages'. Following the successful exercise, this idea was developed into a concept note and successful funding application that is now supporting youth-led initiatives in ten local villages. Unexpectedly, the IBM placement therefore supported the project development that has received funding from other donors.

**Key Learning:** The increase in number of SHGs with bank accounts, the higher number of SHG members with life insurance and associated use of social media and smartphones to access state resources are all unexpected impacts that have improved the well-being of a number of people in local communities. Learning from how these unexpected impacts came about may help in designing future interventions and projects that both anticipate and help facilitate such changes. There is also potentially more that can be made of the positive associations that can be fostered through the collaboration of corporate partner, facilitating agency and local partners.

## Sustainability

Visiting the partner and communities approximately nine months after the IBM placement enabled the issue of sustainability to be assessed. In terms of the financial management tool, this was found to still be useful and actively used by the SHGs and HWA staff supporting them. The fact that SHG members stated that they chose to continue using some of their subscriptions fees to pay for support from HWA staff highlights the value that they attach to the service (HWA staff assist in the use of the financial management tool). Part of this success was attributed to the IBMers developing a tool that was simple to use.

However, the research did find that the MIS system was not being used to generate reporting in the way that had been initially envisaged. The plan had been to use the collected data to produce monthly reports across all SHGs but this appeared to be too much of an administrative burden for HWA staff. Instead reports were produced only when there was a requirement from external donors.

For the artisans, the use of social media such as WhatsApp was the most significant long-term change. However, this was found to be predominantly used for communicating with buyers (something which reduced travel costs) rather than its anticipated use for wider branding and marketing. Part of the issue around this relates to the project's grouping of artisans communities into their respective trades when, in practice, it appeared that artisans promoted their businesses individually rather as craft-wide cooperatives or collectives. Marketing activity therefore seemed to be relatively uncoordinated and isolated. Whereas WhatsApp worked within this dynamic as a cheap line of communication, using social media as a sector-wide marketing initiative had little incentive as an individualised activity. This is something that could have been picked up through a thorough value chain analysis and more detailed project planning.

During field visits, the research heard of other challenges and opportunities that were potentially important when considering long-term sustainability. For example, discussions with artisans revealed that a significant problem in some of the crafts were low levels of literacy amongst the artisans. This impeded their ability to communicate with buyers and also made it difficult to understand the changing dynamics of the market for their products. For such artisans, training on the use of social media and branding would achieve little until their literacy improved. Other artisans noted that a bigger challenge was the lack of skilled workers coming into the trade. For them, establishing a training centre to encourage and give official recognition to such crafts was necessary for long-term success.



There was general agreement that the knowledge sharing component of the work with the IBM CSC team was the most important and also the most significant for ensuring sustainability. This was perceived as preferable to receiving a monetary grant. However, the case was made for receiving a small grant following the IBM placement in order to provide some capability to act on the team's recommendations. Without this, it was felt that it would not be possible to implement some of the recommendations. One example where this did become an issue was in the production of a marketing brochure/product catalogue for the seven artisan crafts. Without a dedicated budget, HWA were unable to lead on this and it was only through the support of VSO that the brochure was eventually produced.

**Key Learning:** As the general secretary of HWA stated, to achieve sustainability, “don't go in project mode, go in programmes”. The reflection highlights the importance of pursuing an integrated approach that considers both the relevance of interventions to specifically identified needs and the implications in terms of ensuring the long-term sustainability of impacts. The case of the financial management tool is an excellent example; whereas the tool itself is still utilised because it is practically useful for the SHGs, monthly reporting has not been undertaken because it does not meet any identified need (apart from donor reports are required which is not monthly). The issue of budgetary support also raises the prospect of more holistic programmes that combine different types of intervention – for example, combining the use of different types of placements and volunteers (corporate, international, national, local, online), successive cycles of placements addressing a series of issues, and providing some funds directly to partners to implement specific recommendations.

## Case Study 2: The Samarthanam Trust for the Disabled in Bangalore

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### Programme design: the relevance and appropriateness of partnership and project focus

For four weeks, from February to March 2015, three IBM CSC participants were placed with the Samarthanam Trust for the Disabled (hereafter referred to as Samarthanam) in Bangalore where they were charged with developing a business expansion strategy for the organisation's Business Processing and Outsourcing (BPO) centre. The BPO is a social enterprise under Samarthanam and as a separate entity operates under the name Kirana. As in other IBM CSC cycles supported by VSO, the three participants formed part of a wider team of IBMers working across a total of four organisations in Bangalore.

#### i. Partner selection and alignment of strategic aims

Interviews with key VSO staff involved in the selection of Samarthanam as an IBM CSC partner highlighted that two overriding criteria were used in the screening of all partners. Firstly, potential partners were assessed on their capacity to absorb and make use of the skills of the IBM CSC participants. Partners needed to exhibit an understanding of how the IBMers may be used to support strategic objectives and have the internal infrastructure and processes in place to support them. Secondly, partners were judged in relation to whether their values and organisational objectives strategically aligned with those of VSO and the IBM CSC initiative.

On both counts, Samarthanam was found to be a good match as a partner. Samarthanam has special consultative status with the UN through ECOSOC (Economic and Social Council) and an organisational mission to empower visually impaired, disabled and underprivileged people through developmental initiatives focusing on educational, social, cultural and technology (see

<http://www.samarthanam.org/samarthanam-genesis> for more information). This aligns well with VSO India's aims to work with people living with poverty and particularly people with disabilities.

The evaluation visit found that the initial assessment of Samarthanam as an appropriate partner had been an accurate one. Furthermore, one aspect that emerged as potentially critical to the success of the partnership was Samarthanam's understanding of the role and potential roles of volunteers within the organisation. Interviews with senior staff found that volunteers had played a big part in the growth of Samarthanam – apparently it was entirely reliant on the efforts of volunteers when it was established and, at present, volunteers were still responsible for approximately a third of duties. As one staff member stated “most volunteers come with passion so it's how you can evoke this for the good of the organisation [that's important]”.

Samarthanam demonstrated a clear commitment to and understanding of working with volunteers – an organisational culture that aligned with that of VSO. One senior member of staff commented that volunteers were “integrated into the ecosystem and drive it” and that it was “important to have preparedness to work with volunteers, some organisations are just too rigid”. Therefore, whilst there was strategic alignment in terms of organisational aims, critically there was also alignment in terms of views on the process of working through volunteers to achieve them. This addition of shared understanding on ways of working – to shared values and objectives – was found to be a potentially decisive factor in ensuring a successful partnership.

In the case of Samarthanam in Bangalore, the partner selection process worked well but the evaluation did find some issues within the process that posed potential challenges. The most pertinent of these relates to the logistical timelines of submitting applications and identifying partners. The initial deadline for VSO submitting an application to host IBM CSC in Bangalore provided minimal opportunities to properly screen partners beforehand. Partners were assessed more thoroughly after being awarded the contract but time for more preliminary work would have lessened the risk of not finding enough suitable host partner organisations. To a certain extent, the successful sourcing of four host partners for the IBM team was influenced by the fact that responsible VSO member of staff had a long personal history and was well connected with organisations in Bangalore (despite VSO India not having an active presence in Bangalore). However, it should also be noted that the Bangalore IBM CSC cycle was the first in the partnership with VSO and, as such, the process was actively being developed.

**Key Learning:** Including appropriate selection criteria is an essential component of identifying partner organisations. Whilst alignment of strategic aims and values and an organisational assessment of the capacity to work with volunteers are important, it is also vital to understand organisational culture and how it perceives the role of volunteers.

## ii. The CSC participant and partner matching process

The process of identifying the skill needs of the partner organisation and matching it with the skills of IBM CSC participants appears to have run smoothly. Staff from Samarthanam and VSO raised no concerns with the process and reported being satisfied with how it had been undertaken. However, there was a little uncertainty as to the skills that Samarthanam requested. For example, one member of staff observed that VSO had taken their requirement and allocated the IBMers that had relevant skills whereas another member of staff stated that Samarthanam had not requested specific skills – instead they had just wanted a third party review of their work. It is likely in the latter example that,

given the review was of Samarthanam's work through the Kirana BPO, some kind of business development skills would have been a prerequisite for the CSC participants.

In this case, the IBM CSC team-based model incorporating participants with a range of skills appears to have been effective for Samarthanam as they received professionals with highly relevant skills.

**Key Learning:** To achieve development impact it is important that the needs of the partner organisations are prioritised rather than activities/outputs being designed around the skills of the volunteer or participant in the scheme. Utilising a team-based model with a mix of skill sets may provide flexibility in aligning skills to development needs and can be an effective approach when participants are selected before projects or partners are identified.

### iii. VSO's role in the programme

The senior leadership at Samarthanam spoke very highly of the role played by VSO in facilitating the placement of the IBM CSC participants. One observation was that VSO played a crucial role in successfully bringing the IBMers and Samarthanam together – as one senior member of staff commented, they “made sure we were both on the same page... VSO played a fantastic role; I personally feel facilitators are required”.

This role as a facilitator or catalyst was repeatedly stressed by members of Samarthanam – a role that appeared to encompass strategic alignment of values, the matching of skills to needs and operational logistical support. This was seen as an important combination with one senior staff member reflecting that “I prefer to have a catalyst to understand the needs of the corporate and the NGO; the blend is very important”.

Samarthanam proved to be very useful case study in that, with a long history of engaging with volunteers, staff were well placed to compare against examples when the process had not run effectively. Specifically, some staff members referred to cases where ‘direct’ volunteers – those that arrive with little or no pre-placement support or briefing – come to Samarthanam. Here a member of staff highlighted the problem: “with direct volunteers, they don’t have a clue, they spend time understanding and by that time, time is up”. Staff also emphasized the importance of the organisation having time to plan ahead of the arrival of volunteers rather than just focusing on giving pre-placement briefings to volunteers. This was an area where it was felt VSO added a lot of value as they involved both the partner and IBMers in the pre-placement process.

Looking to the future, members of Samarthanam noted increased enthusiasm for volunteering with one person saying there has been a “big shift and everyone is talking about volunteering now” whereas two year ago they were not. This comment was directed specifically toward corporate companies in India, specifically because a recent change to company law in April 2014 now requires businesses with revenues of over 10bn rupees (approx. £115m) to use 2% of their net profit on corporate social responsibility initiatives<sup>4</sup>. Reflecting on this, one staff member commented that there was a potentially substantial role for VSO to play in “bridging the gap” between corporate businesses and smaller development organisations.

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<sup>4</sup> See: <https://www.theguardian.com/sustainable-business/2016/apr/05/india-csr-law-requires-companies-profits-to-charity-is-it-working> [Accessed 15.08.16]

**Key Learning:** Initiatives such as the IBM CSC involve the management of multiple relationships between corporate employee participants in the scheme, host organisations like Samarthanam and sending companies such as IBM. Ensuring all parties are on board and involved in the pre-placement process is essential for the success of the project – it also requires resources. In this case, VSO provided an important ‘bridging’ or facilitating service that placed the project on solid foundations. In future within the Indian context, there are likely to be further opportunities to expand the scale of this kind of work.

#### iv. Length of placement

The four-week placement length was generally considered to be adequate for achieving the agreed project deliverables. Samarthanam staff members expressed no concerns that the placement length was too short with one member of staff, who worked closely with the IBMers, reflecting that the time was sufficient. Two key factors that appear to have been significant in ensuring four-weeks was a suitable length of time were the appropriate setting of realistic project outputs and effective work management, including the delegation of tasks by the IBM CSC participants.

On the former, the development of a business expansion strategy was both an appropriate and clearly defined piece of work to be achieved within the four-week window. It allowed for the disaggregation of tasks so that the IBMers could begin with evidence gathering visits, spread their time between the Samarthanam offices and Kirana BPO (the Kirana BPO is located in Bidadi, approximately 40km from the Samarthanam offices in Bangalore) and leave time for drafting the report and feeding back. Regarding the latter, the IBM team were effective in managing their workload and delegating tasks. Across the three CSC participants, one Samarthanam staff member observed that one led on the documentation, another on the work the team leads at the BPO and the third on the engagement with clients.

**Key Learning:** Realistic and appropriate project deliverables are essential when designing an initiative utilising time-limited four-week placements. Mapping sub-tasks to achieve key outputs can be a useful way to ensure deliverables are realistic. Equally important is the effective task management and delegation of duties by those undertaking placements.

#### v. Problem identification and placement activities

The evaluation found that the Kirana BPO’s mission to provide livelihoods opportunities to people with disabilities and unemployed rural youth (with a particular focus on women) made it a justified focus area for the IBM CSC initiative. Interviews with Samarthanam members of staff revealed that, prior to the IBM intervention, Kirana had been identified by the organisation as being in need of additional expertise in order to expand the operation. Senior staff members realised that without a dedicated business development plan and a more systematic approach to identifying and minimising risk, it was going to be unlikely that Samarthanam would achieve its ambitious target to grow its Kirana social enterprise from 125 employees to 6000 by 2020.

The Kirana BPO had been operating since June 2011 but the maximum number of employees it had up until the IBM CSC team arrived in February 2015 was 125. For Samarthanam staff, Kirana was not expanding at the rate that had been hoped. To paraphrase one senior staff member, “after 3-4 years, we realised that you couldn’t run a social enterprise with just passion and emotion – it needs skills and expertise”. Understanding what needed to be done to grow the social enterprise and developing a business expansion strategy to achieve it were therefore legitimate and appropriate interventions to address a highly relevant problem.

In order to meet the identified needs, IBM CSC activities were structured around meeting three key objectives:

- 1) The production of an evidence based report for the expansion of the BPO including information on the creation of new avenues of engagement with new and existing clients, a wider portfolio of services and a proposed model for increasing capacity.
- 2) A sales presentation to be used with current and potential clients.
- 3) A list of recommendations for internal branding including the perceived image of the BPO facility and ways through which to improve employee motivation and engagement.

Based upon discussions with staff from Samarthanam and VSO, these objectives and the activities (such as site visits, workshops and employee mentoring) that accompanied them were found to be both highly relevant and appropriate. As a whole the project demonstrated very clear logic from problem identification and intervention design to objective and activity setting.

**Key Learning:** The initiative was successful in providing a highly appropriate solution to a clearly identified problem. From this, the objectives which included the key deliverables for the IBMers were well structured to support the achievement of the overall project goal.

#### vi. Gender and social inclusion

In terms of project design, the intervention was aimed at improving the functioning and furthering the expansion of the Kirana BPO, a social enterprise that provides livelihood opportunities to people with disabilities – particularly those with visual impairments – and rural unemployed people aged 18-35 years of age with a specific focus on women. Social inclusion and gender therefore formed a core component of the context within which the IBMers were operating. As the Kirana BPO had an explicit focus on providing opportunities to women and historically marginalised groups, there was little scope for the IBMers to place greater emphasis on it.

During a field visit to the Kirana BPO the evaluation team found that approximately 47% of staff were people with disabilities whilst 53% were rural youths. Of the people with disabilities, just under half were women whereas for the rural youths, over two-thirds were women. Although the percentage of people with disabilities was not as high as reported at the time of the IBM CSC placement (staff reported a number of challenges around recruitment), the breakdown of employees according to gender and social inclusion did indicate a clear intervention emphasis on unemployed women and people with disabilities.

In terms of the gender balance of the IBM team, all three were women. At no point in the evaluation was any negative sentiment encountered in either working with a female IBMer or in relation to all the IBMers being of the same gender. This is not to claim that there were no gender dynamics within the project but, within the limited fieldwork window, no issues were surfaced.

**Key Learning:** Gender and social inclusion formed a core part of what the IBMers ultimately sought to improve. For this reason, in terms of project design, the focus was both relevant and appropriate.



## Project delivery – effectiveness and efficiency

### i. Activities and ways of working

In terms of the four week placement, IBM CSC participants appear to have spent approximately one week working with staff at the Kirana BPO, one week with staff at Samarthanam and one week writing the final report and producing the other outputs such as the sales presentation. Despite not being explicitly stated, the evaluation understood that the remaining week was spent on a variety of other tasks such as induction and visiting clients.

The final expansion report produced by the IBMers identifies the activities undertaken as follows:

- Analysis of BPO and the current BPO market in Bangalore including interviews with BPO staff and an existing client
- Production of business expansion plan including financial and marketing strategies
- Development of sales presentation for Kirana BPO
- Development of recommendations for enhancing the image of Kirana BPO and ways to maintain the motivation of staff at Kirana BPO
- Knowledge transfer to key Samarthanam staff in business development strategies, tools and processes used during the CSC assignment

Findings from interviews and discussions with Samarthanam and VSO staff suggest that the IBM CSC participants undertook these activities effectively and efficiency. One senior Samarthanam staff member observed that the IBM CSC team were highly committed and often worked evenings, stated that they “were here for four weeks but they did more like 150%”. Furthermore, this highly professional and committed approach to the placement appears to have had a positive motivating effect on staff members of Samarthanam and Kirana.

The ways in which the IBMers worked with staff members was found to be particularly important. On working with the IBM CSC team and participating in their ‘fun activities’, one visually impaired staff member of Kirana remarked that “it was a wonderful experience”. It was observed by senior Samarthanam staff that the IBMers ran sessions with the Kirana BPO team leaders and approached things in different ways. They brought in a third-party independent view of what happens globally and provided multiple solutions which made it easier to find a suitable way forward. CSC participants interacted in a different way with the Kirana team leaders, asking them what they wanted and enjoyed rather than just focusing on operational delivery which appears to have been the previous way of functioning.

This way of approaching problems and developing solutions modelled a way of working that had a significant effect on staff members from call-centre operatives to their team leaders, the Kirana operations manager and senior members of Samarthanam. This will be discussed further in the following section on outcomes and impacts but it is worth noting that this outcome is specifically rooted in how IBMers modelled a way of working rather than in the stated project activities and deliverables.

**Key Learning:** Ensuring the effective and efficient implementation of project activities is undoubtedly important. However, it is important to also recognise and appreciate how the ways in which participants in such schemes work can have a significant impact, particularly in terms of modelling professional behaviours and motivating others. Placing more emphasis on encouraging this kind of interaction as part of pre-placement briefings and preparation has the potential to further support these positive effects.

## ii. Support and logistics

Samarthanam staff members reported being very satisfied with the support provided by VSO to the CSC participants. It was observed that there was no significant language barrier for the IBM team when interacting with staff of Samarthanam and Kirana. This appears to have made it easier for the IBM team to divide responsibilities and do more as they were not reliant on interpretation services. As such, this can be seen as another factor that meant four weeks was a sufficient placement length to achieve the project deliverables.

**Key Learning:** When using a team-based model and particularly when it is based on short-term placements, it is important to consider the availability of interpretation services and the implications of overcoming language barriers with limited resources. If interpretation services need to be shared across a team then there is a risk that it will negatively impact on the effectiveness of initiative in achieving key project outputs.

## Outcomes and impact

### Positive reported impacts

The IBM team were successful in producing the three key project deliverables – the business expansion strategy, Kirana sales presentation and internal branding document setting out ideas for training and motivating staff. These key outputs along with training provided to staff (including formal and informal activities such as mentoring) and the ways in which the CSC participants worked contributed to a number of reported changes. These will be discussed in more detail below but it is first important to highlight that the IBM team also provided a number of additional deliverables that made important contributions. These deliverables included:

- An Expansion Projection Excel sheet that provided an overview of the proposed expansion and the implications for the organisation in terms of resources, and the cost projections of setting up BPO centres in rural, semi-urban and urban locations.
- Sales Pipeline Management Guidance that provided Kirana with a starting point on how to create more structure around managing new sales opportunities including a link to a SME toolkit.
- A template for client references /testimonials that outlined what questions Kirana should ask their clients in order to create a successful client testimonial.
- A Kirana specific mission and vision statement included within the business expansion strategy that meant it no longer relied on the statement used by Samarthanam.
- A discussion with a key client that outlined possible ways forward for expanding the current contract with Kirana.
- Although included in the business expansion strategy, a number of specific recommendations were made in order to grow the business such as the recruitment of a dedicated Kirana business development manager.

Despite not being included in the initial list of key project deliverables, these additional outputs played an important role in facilitating change. They also highlight how the IBM team adapted and addressed issues as they emerged, providing extra support where they encountered a challenge or noticed an opportunity.

In terms of observable outcomes and impacts, the evaluation found changes at three distinct levels. These included at the strategic organisational and senior management level, across middle management (team

leads) and interaction from senior to junior staff, and finally amongst people with disabilities and rural youths employed within the BPO on client contracts (which is sometimes referred to as a 'seat').

#### i. Changes for strategic organisational direction and amongst senior management

It was clear from engagement with the senior management of Kirana and Samarthanam that the IBM visit had had a significant positive impact upon them. However, it was not immediately clear as to the ways in which the IBMers had influenced the direction of their operations.

Initial discussions focused on the key deliverables of the internal branding document, sales presentation and particularly the business expansion strategy. This provided some encouraging insights that specific materials developed by IBM were actively being used. For example, senior managers referred to using the Sales Pipeline Management Guidance regularly as a shared document and to continuously using the Kirana sales presentation when engaging potential clients.

The situation became more complicated when the detailed growth projections of the IBM business expansion strategy were interrogated. It quickly became apparent that Samarthanam and Kirana had not managed to keep pace with the ambitious growth targets set out in the strategy. The table below sets out the IBM projections for increases in seat numbers included in the expansion strategy compared to actual figures in the 15 months since their placement and revised projections made by Samarthanam/Kirana.

**Table 1: The expansion figures provided by IBM based roughly on a year-by-year doubling in seat numbers, the actual figures since the IBM visit and the revised seat projections provided during a workshop with senior management**

| Capacity:<br>No. of seats<br>(staff employed<br>on client/in-<br>house contracts) | March<br>2015 (IBM<br>placement) | End 2015                 | June<br>2016<br>(evaluation<br>visit) | End<br>2016 | End<br>2017  | End<br>2018  | End<br>2019  | End<br>2020  |
|---|----------------------------------|--------------------------|---------------------------------------|-------------|--------------|--------------|--------------|--------------|
| <b>IBM projection</b>   | <b>125</b>                       | <b>300</b>               | <b>400<sup>5</sup></b>                | <b>500</b>  | <b>1,000</b> | <b>1,600</b> | <b>3,000</b> | <b>6,000</b> |
| <b>Actual figures</b>   | <b>125</b>                       | <b>N / A<sup>6</sup></b> | <b>135</b>                            |             |              |              |              |              |
| <b>Revised<br/>Samarthanam<br/>projections</b>                                    |                                  |                          |                                       | <b>235</b>  | <b>1,000</b> | <b>1,600</b> | <b>3,000</b> | <b>6,000</b> |

As the table shows, rather than increasing to a projected 400 seats by the time of the evaluation visit in June 2016, it was found that there were only 135 seats – a marginal increase of 10 seats from the time of the IBM visit. Furthermore, despite an IBM projected increase to 500 seats by the end of 2016, revised projections estimated a smaller increase to 235 seats.

Interestingly, senior management still expected growth to increase to meet the initial IBM projections and within this lies the fuller impact of the IBM team's work. Whereas a simplistic tracking of whether key growth targets were met would cast doubt on positive impacts, the evaluation ran a workshop with senior staff to better understand the process of change since the IBMers visited, explore outcomes beyond those recommended in the project deliverables and unpick the influence of other contextual factors.

<sup>5</sup> IBM did not make a projection for mid-2016 so this is an estimate based on the 2015 and 2016 year end projections.

<sup>6</sup> The exact seat number at the end of 2015 was not assessed. However, discussions revealed that there had been a reduction in seat numbers as the organisation cut back on contracts that were not cost-effective. This was followed by an increase in seat numbers supported, in part, by the growth of in-house telephone fundraising for Samarthanam.

The most significant change that was repeatedly stressed by senior management was how the IBM team's work had been an 'eye opener' in terms of what they needed to do to expand the business and had given them the confidence to actively pursue their goals. CSC participants encouraged staff to look more closely at profit and loss, to do a more thorough cost feasibility analysis of existing and potential contracts, and to only proceed with particular payment models. On the latter, the IBM team helped in understanding the strengths and weakness of various approaches including flat payments models where income is guaranteed, variable models where payment is purely dependent on the meeting of performance related targets and hybrid models which involve a guaranteed fee and then performance related payments. As a result of this, the decision was taken to not accept contracts on a purely variable model and staff became more confident in negotiating for the payment models that suited their organisation.

Furthermore IBMers introduced the idea that Kirana could actively develop and push for more business from existing clients. This was in contrast to previous practice that was more passive and generally waited for existing clients to offer more business. The IBMers also helped senior staff understand that, in order to meet their growth targets, it would be necessary to expand beyond operating only in Bangalore. As a result, staff have been exploring opportunities with new corporate clients that are interested in outsourcing some operations and the government as part of its drive toward digitisation.

Using information to manage risks and inform decision-making has been a key organisational change in how Samarathanam/Kirana does business. For example, although Samarathanam already had Excel sheets to monitor financial information in place, they were not looked at on a regular basis. As one staff member observed, IBMers changed the way they use existing information by putting in a process of monthly financial reporting which the organisation has continued to do since the IBM team left. The critical impact here is that this reporting was identified by staff as one factor that made the organisation re-evaluate the cost-effectiveness of its current client and associated contracts. The result has been that contracts that deliver profits have been retained whereas those that do not have been terminated.

This is vitally important in looking beyond the performance against the IBM projected expansion numbers. So between the time that the IBMers left (March 2015) and the evaluation fieldwork (June 2016) the number of seats (staff on client contracts) actually decreased but, despite some challenges that affected numbers which will be discussed further below, the main driver for this decrease was a strategic decision by Samarathanam/Kirana to consolidate its client/contract base and place greater emphasis on profitability. Up until the visit of the IBM CSC participants, the positive social impact of the Kirana social enterprise had been the main selling point but their work made senior staff realise that it would not be possible to scale-up such an approach without it being financially sustainable.

For Samarathanam/Kirana, the IBM expansion plan provided a clear agenda and strategic approach that has had a noticeable impact on the organisational mind-set – as one staff member commented, "IBM initiated this change in thinking". The number of seats may have decreased but have since recovered to the point where there were 10 more seats when fieldwork was undertaken compared to when IBMers conducted their work. More significantly, senior staff outlined a number of emerging pieces of work that had the potential to increase growth numbers to a level that would match those projected by the IBM CSC team. For example, expansion of existing centres is expected to increase the number of seats by 100 to a total of 235 by the end of 2016. And a major contract with a corporate client looks set to expand Samarathanam's presence into other parts of the country with the potential for 160 seats in 8 new centres. This would be matched in those centres by another 160 seats that would provide telephone fundraising for Samarathanam's activities. This essentially in-house service was found to not only provide a vital source of funds for Samarathanam but also provided a progression pathway for new employees that had recently completed their training in Samarathanam's associated Livelihood Resource Centres (LRCs) before then going on to work on corporate client contract once they had more experience. Additionally, this in-house

fundraising service ensured greater job security for staff as, if and when, other contracts were terminated the released staff could be reallocated to it until other external contracts were acquired

With negotiations progressing with the government about significant contracts related to its digitisation drive, there is every chance that Samarathanam/Kirana may gain the clients necessary to expand the business in the short to mid-term to meet the projected end of 2017 targets. Senior staff were confident that, if things stayed to plan and with the support of a dedicated business support manager, they would be able to have 17 training centres and 1000 seats in BPOs by the end of 2017.

For senior staff of Samarathanam/Kirana, IBMers introduced new ideas and by providing a third-party and more independent assessment of their work gave them the confidence to drive forward with their plans. As one founding member commented, “they set the fire”. Another senior member observed that “they strengthened our belief that we can grow; they brought good structures and systems, and created a lot of visibility – this was the first time we had an external view”.

**Key Learning:** When investigating outcomes and impacts it is important to look beyond the implication of specific recommendations or the meeting of individual targets. Findings from interviews with senior staff reveal that the IBM team’s work had a significant impact on the organisational mind-set and attitudes of key staff. This has enabled the organisation to consolidate its business around more profitable contracts and strengthen its foundations for expanding the business in future. Corporate volunteers with technical expertise can play a significant facilitating role both through the development of specific deliverables such as expansion strategies and branding documents and through their ways of working such as mentoring staff and modelling professional practice.

### **Changes in management style of leaders at Kirana and interaction across roles**

During the fieldwork, a focus group discussion was held with the three team leads at the Kirana BPO in Bidadi. The team leads report to the operational manager for the BPO and have responsibility for managing the teams of operatives that work directly on client contracts. As such they fulfil a key role in monitoring and promoting performance.

The discussion found that the team leaders valued their engagement with the IBMers, who provided advice on motivation strategies. As one respondent stated, “we personally feel that we are improving”. The IBM CSC participants introduced ideas around incentives and rewards such as the ‘busy bee’ for high attendance, ‘star of the month’ for the staff raising the most funds and ‘Top Gun’ for the most consistent performers over a quarter. A critical change also came in how the IBMers modelled a way of working that engaged people individually in asking what their needs were rather than just focusing on organisational performance. As a result, team leaders were taking the time to engage members of their team to better understand their personal development needs. This focus on building relationships and personal interaction not only meant that the IBMers designed incentives that were more culturally sensitive but it also led to team leaders adopting a similar way of working.

A new introduction that was referred to in sessions with team leaders, staff and senior managers was a bell on the BPO work-floor; every time a member of staff made a successful sale, they would ring the bell and announce the amount raised, after which other staff would then applaud. For people with visual impairments, this audible way of recognising success was regarded as particularly effective. In addition to the bell a daily leader-board in each team was also used to record the top fundraises. Team leaders claimed that these measures had improved both their own motivation and performance and that of staff; however,

despite some individual stories of increased performance in terms of funds raised, it was not possible to validate these claims across the entire workforce.

A significant change was observed in how the IBMers promoted better communication across the levels of management hierarchy. Whereas staff and team leaders had previously been wary of raising issues, IBMers, through the mentoring of staff, emphasized the importance of dialogue. One team leader stated we “can express our ideas more which makes a big difference”. The team leaders noted how they could now engage management more proactively and that they would listen to their issues. Senior management also appreciated the positive working environment – they observed that relations between staff and team leaders and the Kirana operations manager and team leaders had improved.

**Key Learning:** IBM CSC participants introduced a number of new ideas that were tailored to the specific context through their engagement with staff and team leaders. Through training and mentoring they also encouraged new ways of thinking that improved communication within the organisation and led to enabled team leaders to provide more personalised support, incentives and management.

### Changes amongst staff at the Kirana BPO

From discussions with staff and the operations manager of the Kirana BPO, an initial list of areas where staff (in particular, people with disabilities) had experienced changes since the time of the IBM visit. The list included eleven key areas which were used to structure a focus group discussion and ranking exercise with four members of staff with visual impairments. To increase participations, the eleven areas were written onto separate pieces of card using a Braille writing slate and distributed amongst the participants with each taking it in turns to speak to one of the areas. The following bullet point summarise the discussion around the identified changes:

- **Confidence** – participants said that they felt less confident before the IBM CSC team visited. The IBMers helped them in learning about how to speak to customers and gave advice on how to work as a team and in a team. They were now more confident in speaking which also helped in face-to-face communication as well as outside of work.
- **Skill development** – staff had learnt “proper communication skills” including listening skills and techniques for interaction and handling customers. It was felt that this was something that had specifically come from the IBM CSC team.
- **Respect** – participants spoke of both the importance of being respectful and of experiencing greater respect toward them. As people with visual impairments they felt more respected by customers, neighbours and family members and noticed the difference in people they met when it was revealed that they worked in a call centre. It was noted that family members would often think they could not do anything but became proud when they started working and it became clear they could live an active life.
- **Quality of life** – respondents emphasized that as they were now earning money, “we are not depending on anyone”. Taking care of themselves was seen as an important part in improving the quality of their lives. A number of cases were also reported of staff with disabilities that had initially been living in the provided accommodation but had moved out to their own rented accommodation in the town. There were also cases where staff had met life partners through work and moved in together.
- **Salary** – there had been incremental increases in salary which had been a positive change.
- **Motivation** – participants noted how incentives were now used to motivate staff (referred to as ‘agents’). Leader-boards were used in the centre to promote competition and top performers were

given money. There were attendance ‘busy bee’ prizes and the effect had been that it motivated others to behave in a similar way. IBMers also presented the Kirana BPO with a bell to help with motivation; as one participant stated, “if we ring the bell, everybody will clap together so it inspires us to raise more”.

- **Training** – the training provided by the IBMers was valued as it helped to improve the confidence of staff. It helped in convincing customers and how to answer questions. However, it was observed that there had been little additional training over the last six months.
- **Productivity** – participants felt they had increased their productivity month-by-month. One male member of staff said that their monthly fundraising total had increased from 50-60,000 Rps at the time of the IBM visit to 125-150,000 Rps at present. The other male and one female members of staff noted an approximate doubling of funds raised over the same period (from 30-40,000 Rps to 75-80,000 Rps). The second female staff member reported a more modest increase.
- **Workplace** – the discussion revealed high levels of satisfaction with the workplace environment but also little evidence of change during or after the IBM visit.
- **Responsibility** – staff now had monthly targets and they felt they had more responsibility. As more established members of staff, they also took more responsibility in the induction process for new staff.
- **Aspirations** – participants highlighted an increase in their aspirations in terms of personal development and future career options. A shared view was the desire to improve oneself and how this may lead to more opportunities. All four members of staff highlighted an aspiration to eventually get a government job as it was perceived as providing a wider skills base and was a more comfortable and secure position. A couple of members of staff had moved on to get government jobs over the last year and this had encouraged others to consider a similar move.

Following the general discussion of the areas, the participants were asked to identify and rank their three most significant changes since the IBMers finished their placement in March 2015.

**Table 2: The three most significant changes from March 2015 to June 2016 for the four staff with disabilities**

| Kirana staff member | 1 <sup>st</sup> most significant change | 2 <sup>nd</sup> most significant change | 3 <sup>rd</sup> most significant change |
|---------------------|---|---|---|
| Female (1)          | Quality of life                         | Confidence                              | Skill development                       |
| Female (2)          | Salary                                  | Motivation                              | Respect                                 |
| Male (3)            | Responsibility                          | Quality of life                         | Skill development                       |
| Male (4)            | Quality of life                         | Responsibility                          | Confidence                              |

An increase in quality of life is ranked top by two of the four members of staff and features second for another. Increased responsibility, confidence and skill development were also seen as significant. Increased salary was noted as the lead change for one of the female member of staff.

These responses point toward significant positive changes for members of staff since the IBMers conducted their work. As one participant commented, “we can say slowly and steadily wins the race, so we are making incremental changes and we are stepping out with success”. During facilitation, attempts were made to get participants thinking about the degree to which changes were possibly linked to the work of the IBM CSC participants. From this, the areas of skill development, improved confidence and valuable training emerged as key changes that staff had personally experienced from their engagement with the IBMers. The session with the team leaders also revealed that the IBMers’ work on improving motivation techniques had had an impact through them to members of staff with some indication that this had led to increased productivity.

On the latter, attempts were made to triangulate the claims for increased productivity. However interviews with senior staff revealed that the high performing 20% of the workforce can bring in up to 80% of funds and that average monthly totals varied greatly particularly according to how new the employees were to the business. Variation in roles with some focusing on new customers and others on established customers also led to significant differences. More detailed analysis of performance data would be required to substantiate the claims of increased productivity, although it should also be noted that both senior management and team leaders agreed with the claims of staff with disabilities that productivity had gone up.

**Key Learning:** Positive changes for staff with disabilities were reported which can be attributed, at least partly, to the actions of the IBM CSC participants. Changes such as increased confidence and improved skills were more easily identified as resulting from direct engagement with the IBMers. It is highly likely that these changes also played a significant role in contributing to other positive outcomes such as improved quality of life, increased respect and raised aspirations. Responses also indicate that work CSC participants undertook with team leaders on incentivising and motivating staff has subsequently had a positive impact on staff motivation and productivity levels.

## Challenges

The evaluation came across a number of challenges experienced by Samarthanam/Kirana that had hindered progress since the IBMers concluded their work in March 2015. Some of these had been unexpected and had a direct impact on the ability of the organisation to meet the targets and recommendations as set out by IBM, whereas others were ongoing challenges.

In terms of the latter, the research found that of the 20 people currently (as of June 2016) using the in-house accommodation provided by the Kirana BPO, 15 were men and only 5 were women. The reason for this gender disparity was apparently that most of the people who used the in-house accommodation were people with disabilities who had travelled a long way (i.e. over 100 km) to take up the job – rural youths tended to be recruited more locally. For staff with disabilities there were often issues in negotiating with their families when starting work and women with disabilities were much less likely to be allowed by their families to travel a long distance; families often felt protective and wanted them nearer to home. Interestingly, managers at the Kirana BPO had actively engaged with some parents of people with disabilities to reassure them about concerns and convince them of the benefits of allowing their sons and daughters to take on paid employment.

Another factor in the gender disparity was that Samarthanam had actually established smaller satellite centres in the regions where some of the people with disabilities had been relocating from. Given the choice, people with disabilities and particularly women with disabilities were working at their nearest centre. An associated challenge that the new centres were seeking to address, was a reduction in the numbers of people with disabilities applying and being recruited. In Bidadi, a semi-rural location outside of Bangalore, senior managers felt that there was limited number of people with disabilities within the local community that could take up a post – barriers such as resistant family members and low levels of literacy made it difficult to increase on the supply-side. Since the IBM CSC visit in 2015, the percentage of staff with disabilities had decreased by 18% from 65% to 47%. Although people with disabilities still made up nearly half of the workforce, engaging future employees with disabilities was likely to continue to be a challenge.

In terms of unexpected challenges, the Kirana BPO experienced some issues with existing clients that contributed to a loss of 'seats' (staff) and missed opportunities for expanding contracts. One example involved a client that defaulted on contractual payment and another involved a client that was bought out by



another business; as a result, the positive relationship which they hoped would lead to more contracts was lost. Finally, negotiations on contracts with the government as part of its 'skilling' agenda had not progressed as quickly as expected, which had impacted upon expansion targets, but it was still hoped that this may provide a platform for significant future growth.

**Key Learning:** The complexities surrounding issues such as disability and social inclusion can have a significant impact on business models and, as such, need to be thoroughly understood and suitable strategies put in place.

### **Influencing contextual factors**

Two critical factors influenced the business trajectory of Samarthanam/Kirana following the IBM visit in 2015 – the emerging government initiatives focusing on skilling and digitisation and the further evolution of Corporate Social Responsibility (CSR) projects and programmes following the introduction of the requirement in 2014 that corporate organisations over a certain size spend 2% of their profits on CSR activities. Both of these wider contextual changes had an impact on Samarthanam/Kirana's business expansion targets as set out in the strategy produced by the IBMers but encouragingly the changes also present opportunities for future growth.

Regarding links with and emerging opportunities with government, Samarthanam/Kirana has made significant headway in engaging with the 'skilling' agenda and this has partly been made possible through the wider programming work of VSO India. As part of VSO's strategy to increase the economic opportunities of people with disabilities, two professional volunteers from another corporate organisation were placed with the national Ministry for Rural Development where they provided assistance on the implementation of the DDU-GKY scheme, an initiative launched in 2014 that focuses on increasing the employability of rural youth through skill development. For Samarthanam, this engagement and exposure was immensely valuable as it led to them applying and becoming accredited as a Project Implementing Agency (PIA) for the DDU-GKY scheme – status that will also increase their reputation amongst potential donors.

The development of this relationship with government also presents possibilities for Samarthanam/Kirana to become involved in the state's reenergised Digital India campaign which will involve the digitisation of administrative records – something that the Kirana BPO is well-placed to do as part of its data entry work. The pace of change and implementation are still unclear but early discussions hint at exciting prospects for expansion if Samarthanam/Kirana is able to secure government contracts for this work.

The second contextual change has been the growth of the 2% levy on the profits of corporate organisation for CSR initiatives. Introduced in 2014, senior staff at Samarthanam observed that as it entered its second year, there was growing interest from corporate clients to spend the funds more effectively and place more emphasis on development results. As senior leader stated, "it's literally gone beyond cheque-writing; it's actually doing something on the ground". This has been significant for Samarthanam as corporate businesses are increasingly looking to support more strategic programmes rather than just donate money. With the end of the financial year in March 2015 and a need to invest the 2% by that time, Samarthanam had been successful in securing a number of new contracts which look set to greatly expand the Kirana social enterprise by the end of 2017. Final proof will be whether Samarthanam/Kirana succeed in their plans over the coming twelve months, but this contextual change certainly provides the opportunity to do so.

**Key Learning:** Samarthanam/Kirana's development of links with government through VSO's wider programmatic approach highlights the importance of taking a systemic approach to interventions. By linking together interventions, the programme has taken a more holistic approach – something that can be further strengthened in future. Such an approach has also had unexpected positive changes for Samarthanam/Kirana by developing relationships with government. Significant opportunity also exists to make more of the 2% levy on corporate profits by offering high quality and strategic programmes to invest in.

### The distinct contribution of volunteerism

The evaluation specifically investigated the distinct contribution of the IBMers in relation to their voluntary participation in the CSC scheme, which meant the initiative embraced a component of volunteerism. This was approached through a series of questions regarding the culture of volunteering within the organisation, how the IBMers interacted with staff from Samarthanam/Kirana and an assessment of the ways they contributed to change (using a tool developed from the Valuing Volunteering research).

Discussions with senior staff revealed an organisational culture that highly valued the contribution of volunteers. The organisation had relied completely on the efforts of volunteers when it was established and they still play a significant role. As one founding member stated, “volunteers come with no expectation and just want to give; most volunteers come with passion that you can't pay for”. As such, within the organisation at least, volunteers were perceived positively.

There was also evidence that the IBM CSC participants had been particularly effective in developing proactive working relationships with members of staff. For example, it was observed that the way the IBMers engaged with the team leaders at the Kirana BPO was different to how managers had previously worked with them; rather than focus purely on operational delivery issues, the IBMers took the time to ask the team leaders about their individual aspirations, what they wanted and what they enjoyed. This ‘softer’ more personal approach appears to have been especially valuable in developing better working relationships – relationships that helped to increase the confidence of team leaders and provide a platform for skill transfer.

An exercise was undertaken with two senior members of Samarthanam/Kirana staff using a tool structured around eight areas of change to ascertain the distinct contribution of the IBM CSC participants. The following bullet points provide a summary of the findings:

- **Service quality and effectiveness** – IBMers provided a range of useful materials and outputs including the expansion strategy, internal branding document, pipeline management excel sheet and sales presentation. As a result of their work, Samarthanam/Kirana is now implementing review meetings with team leaders every two weeks and one member still receives mentoring support from one of the CSC participants.
- **Inclusion** – the IBMers had less impact in this area as the organisation was already explicitly focused on the social inclusion of marginalised groups, particularly people with disabilities and unemployed rural women.
- **Innovation** – the IBMers brought a third party view which created space for critical thinking. The introduced lots of new ideas including a bell in the office, the use of certificates, incentives and prizes to increase motivation, Facebook updates and new business thinking such as an increased emphasis on cost-effectiveness and a feasibility model.
- **Collaboration and networking** – IBM CSC participants helped in developing the relationship with a new corporate client and their involvement as an independent third party helped to ‘mix things up’ and open the way for future change

- **Ownership, agency and confidence** – the endorsement of the IBM CSC external experts helped to build confidence across the organisation and specifically in talking to clients and the sense of belief in future direction. It was also noted that their work helped some staff to open up (through the use of more informal talks) and staff (agents and team leaders) were now happier to raise issues and make suggestions. Staff were more motivated and had ownership of targets.
- **Participatory practice** – the IBMers worked collaboratively and spent quality time with the team which meant that the final reports were not just a product of their expertise – they were joint efforts. Unexpectedly this has also led to Samarthanam/Kirana introducing better documentation of the learning of other volunteers.
- **Social action** – there had not been much continued action in relation to increased social action.
- **Inspiration** – senior leadership were inspired and motivated by the commitment they saw in the IBM CSC team. It was observed that team leaders appeared to be motivated in a similar way.

The discussion revealed that it was not just the written outputs produced as part of the IBM placement that were important. Other critical factors were how the CSC team developed those resources collaboratively, introduced new ideas and practices, engaged staff with a more personal touch to create positive relationships, increased confidence and modelled a way of working that inspired those around them.

### **Unintended and unexpected impacts**

An impact that senior members of Samarthanam/Kirana repeatedly emphasized was how the IBMers had made them rethink their approach to supporting and retaining the knowledge of their other volunteers. Samarthanam works with thousands of volunteers every year (who volunteer from a couple of days upwards) but unfortunately much of the experience and knowledge that they gain is lost to the organisation when they finish volunteering.

The way in which the IBM team produced the expansion strategy and other associated documents has led to Samarthanam adopting similar practices across their volunteering models. Samarthanam has now started building in time for reflection in all its volunteer placements and asks volunteers to document what they have learnt. As one member of staff commented “the documents are there forever so we can always go back to refer”.

Another unexpected impact was the continuing contact between one staff member and one of the IBM CSC participants. This took the form of ongoing professional distance mentoring and sharing of practical resources. The staff member involved was keen to stress how this had helped with their confidence and professional development.

**Key Learning:** Modelling professional practice and encouraging reflective processes have the potential impact upon host partner organisations, even some time after the initial placement. More explicitly engaging partners in how they may learn in such a way may leverage greater positive outcomes.

### **Sustainability**

Visiting Samarthanam/Kirana fifteen months after the IBM CSC participants completed their placement allowed for an informed judgement to be made about the sustainability of the work undertaken. One challenge is that measuring sustainability purely in terms of whether the recommendations and growth targets set out by the IBMers were implemented or met would completely miss the deeper changes in organisational thinking. Ultimately, long-term sustainability is not about implementing recommendations in a future world where those recommendations may lose their relevance. As the case of Samarthanam/Kirana

demonstrates, the sustainable positive impact has been a change in organisational mind-set that means senior leadership are now more confident, better prepared to adapt to evolving contexts and base their decisions on evidence.

Challenges and changing contextual factors have meant that Samarthanam/Kirana has not met the ambitious growth timescales set out in the IBM expansion strategy. But there is evidence that recommendations are still being acted upon, such as the recruitment of a Kirana business development manager, and the strategy document rather than becoming obsolete is still referred to by senior staff as providing an important reminder and reference point.

The evaluation found evidence of promising plans and opportunities for future growth and a sense that Samarthanam/Kirana – due to changes in the strategic thinking of senior management – was on stronger foundations to grow than it had been before the IBM CSC team conducted its visit. The true test will be assessing where the organisation is able to move toward by the end of 2017. If growth is only minimal over this time then it will raise questions as to the real long-term impact of the IBMers' work.

**Key Learning:** The most significant visible change was the change in decision making and strategic mind-set of senior staff. This should prove to be valuable for future growth and is potentially more important than simply implementing the recommendations of the IBM CSC team.

## Conclusions, key learning and recommendations

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### Learning for livelihoods programming

In Varanasi, the IBM CSC work with the Human Welfare Association revolved around developing a branding and marketing strategy for seven artisan crafts and a financial management tool for women's self-help groups (SHGs).

Regarding the artisan crafts the research found differing dynamics and challenges related to each of the seven product value chains. Whilst the partner organisation was clearly very knowledgeable on some of the challenges facing particular crafts, such as increased foreign competition and the fraudulent use of hand-made labels, there was little evidence of a more holistic approach to understanding the value chains and designing interventions accordingly. Without such analysis and understanding, it is difficult to ascertain whether the work of the IBMers in trying to increase sales through branding and marketing was the most effective approach. The advice and support provided tended to apply across all seven crafts and, whilst there was some evidence of positive changes such as the use of social media in communicating directly with buyers, it is likely that the intervention may have had more impact if activities were informed by a thorough a value chain analysis and tailored to the dynamics of each of the seven crafts.

**Recommendation:** Ensuring a robust evidence base is in place when designing interventions is vital. Without fully understanding the processes in a value chain, for example, there is a risk that interventions will be less effective or, at worst, lead to unintended negative outcomes. When working in value chains, an in-depth and practical analysis needs to be undertaken – there is significant potential for corporate employees or volunteers with professional expertise to play a role in facilitating this analysis. Furthermore, if consecutive cycles or a series of interventions were linked it would enable initial efforts to focus on developing the evidence base and programme logic to inform subsequent work.

For the women's self-help groups, the research found strong evidence that IBM support in developing an easy-to-use financial management tool for the groups had benefitted the groups that were visited during the fieldwork, both in terms of their increase in number and the quality of life of their members. Although it was not possible to visit a large sample of SHGs, findings suggest that groups that were not visited in-person are also experiencing at least some of the benefits that the research encountered.

It is important to note that success was also heavily dependent on another contextual factor – the recently launched credit scheme of a national bank (that offered better rates than local money lenders and micro-finance institutions) to self-help groups as long as they could provide the necessary documentation to open a bank account. The IBM financial management tool providing a stepping stone to accessing this bank scheme and it highlighted the importance of understanding how interventions can work with and mutually support other contextual drivers. The research found that the financial management tool was an appropriate and realistic project deliverables within the project timescale which had a long-term sustainable impact because it addressed a genuine need within the functioning of the SHGs.

**Recommendation:** Project deliverables need to be designed around identified and evidence-based needs as well as what is practically possible within the placement window. Better understanding wider contextual drivers (within complex systems such as women's economic empowerment) presents opportunities to design interventions that can work with other change processes. This requires deeper engagement with local and national development contexts and, potentially, greater collaboration with other development actors in order to develop mutually supportive and complementary interventions.

In Bangalore and the case of the Kirana social enterprise, the IBM team had a significant impact in introducing a more business-focused mind-set to local partner Samarthanam. Beforehand, Samarthanam had placed more emphasis on the social impact of their work, had generally accepted business where it was offered and paid little attention to the profitability of contracts. As a result of the work of CSC participants, the partner greatly increased its awareness of the need for financial viability and cost-effectiveness and now only pursues contracts that will deliver this. Challenges remain surrounding the supply and demand of labour but again the partner appears to have a better grasp for how to overcome them; partner staff stressed how having their work reviewed and endorsed by the IBM experts had given them increased confidence to be more proactive in their approach. Whilst ambitious growth targets had not been met, the research considered the increased critical thinking within the organisation along with opportunities presented by the government's Digital India campaign and CSR levy on corporate profits to be laying stronger foundations for future growth.

**Recommendation:** Corporate professionals and volunteers, when perceived as bringing a well-informed independent viewpoint, can add significant value in building organisational confidence and a sense of belief in future direction. This can also be achieved in a short timescale. Using volunteers in similar appropriate contexts should be explored as an effective approach.

### **The importance of fully integrating gender into programmes and interventions**

Gender and social inclusion was a recurring theme throughout the research. For the self-help groups in Varanasi, evidence was found that the focus on women's economic empowerment had yielded positive results. Representatives from a number of SHGs referred to increased feelings of independence and pride as well as more income and being less reliant on local money-lenders. The number of groups had also increased dramatically, although this was partly in response to the offer of credit from a national bank mentioned above.

The case of the seven artisan crafts in Varanasi was more complex and raised some concerns. In some artisan craft value chains, women and men play very specific roles in the production process with businesses often structured around the family unit. In visits to a select number of craftspeople it appeared that men took on the dominant role in the overall process. A major concern was that, whilst the intervention may have been successful in raising the incomes of some artisans and this may have positively impacted on some women involved or connected to the production process, there appeared to be limited efforts to redress unequal gender power imbalances that kept women in secondary roles in the value chains. It should be noted that HWA did indicate some forthcoming work to look at gender roles and other interventions that specifically support more women-dominated crafts that did not form part of the fieldwork visits. However, it was a concern that such issues had not been more fully assessed or understood in the initial design of the IBM placement intervention.

**Recommendation:** An intervention cannot be labelled as gender-sensitive simply because women are involved in the programme or project. For livelihoods work in a value chain, for example, increasing production and profitability does not automatically promote gender equity if women are playing low value-add and secondary roles within the production process. As a priority, issues and dynamics relating to gender and social inclusion need to be thoroughly understood and put at the heart of intervention design and implementation.

In Bangalore, the research found gender targets to be well-integrated into the recruitment of staff for the Kirana call centre. More interesting was how the challenge of recruiting people with disabilities varied according to gender. In many cases, recruiters had to engage with and reassure families of people with disabilities in order to convince them that working for the call centre was a good idea and had many associated benefits. However, men were more likely to travel a longer distance to work at the call centre – where hostel accommodation was provided – than women. This has implications in terms of gender disparities in the catchment area of the centres and warrants further analysis as Samarthanam seeks to expand its Kirana BPO social enterprise.

**Recommendation:** The dynamics of social inclusion can be complex. For Samarthanam, there is likely to be value in better understanding how such dynamics may impact upon the catchment areas for their BPO call centres. Exploring and mapping variations according to gender and social inclusion may assist in decision-making on potential locations for centres.

### **The team-based placement model and the distinct contribution of volunteerism in facilitating change**

In terms of length of placement, although some said that four weeks was adequate, opinion generally favoured slightly longer placements in the region of six weeks. Some partner staff remarked that this would have better enabled the IBMers to achieve particular deliverables. However, when key objectives and outputs are well-defined and practical, partner expectations are realistic and volunteers or participants are motivated, then four week placements can be sufficient.

The IBM team model appeared to work well, particularly for the IBMers, who noted that they gained extra insights and developed valuable relationships with people within their organisation from other parts of the world.

Something that often receives less attention but which was found to be particularly important were the ways in which participants work in their placements. It is understood that in some cases IBM CSC participants visit

the partner organisation and then work from the relative comfort of their hotel. However, for IBMers in Varanasi, they made the conscious decision to work in a space at the partner's office. This appears to have had a significant impact as local staff and volunteers were able to see how they worked as a team rather than just receiving the final report at the end of the placement; partner staff reflected that seeing the IBMers work alongside them in the same conditions gave them extra motivation.

In Bangalore, one senior manager observed that the CSC participants could connect and work well at all levels across the organisation. After modelling this way of working, the partner organisation has subsequently adopted a similar approach. Senior management, staff and their team leaders all said it had contributed toward a more open working environment with a more positive attitude to generating and receiving feedback.

The ability to build and work through relationships was identified in both case studies as a key component that facilitated successful engagement, and something which was enhanced by the CSC participants' voluntary involvement in the scheme. In Varanasi, staff noted how IBMers listened to self-help groups and, in Bangalore, using a more personal touch when working with team leaders meant that IBMers built trust and a better platform for increasing confidence and sharing skills. The CSC participants were also found to bring about change in numerous ways that went beyond the more obvious production of project documents such as branding and expansion strategies. The IBMers brought new ideas that they collaboratively tailored to local contexts, modelled professional working practices and showed commitment that inspired and motivated local staff, built the confidence, ownership and level of critical thinking in organisations and helped develop external links to other organisations.

**Recommendation:** Serious consideration needs to be given to placement length. Whilst four weeks may be sufficient, this is dependent on specific well-defined project objectives (which may still need some flexibility to be adapted once the placement begins), realistic partner expectations and the motivation of volunteers or participants in the scheme. The pre-placement orientation process should also be seen as crucial to maximising time spent on placement – facilitating initial discussions between participants and partner organisations, sharing relevant documentation and awareness raising on professional and cultural contexts are all important components.

**Recommendation:** The ways in which participants in such initiatives work should be given greater emphasis in placement design. Engaging as much as possible with the local context – including partner staff and local communities – is a key component of the volunteer/participant experience and, just as crucially, promotes informal skill transfer to and motivation of staff in partner organisations. This is inextricably linked to the distinct contribution of volunteers in working through relationships to bring about change.

## The role of VSO

Partner organisations, Samarthanam and HWA, were very satisfied with the support provided by VSO and saw them as bringing significant added-value to the process. The Human Welfare Association in Varanasi noted how they would not have initially understood the motivations of IBM – as they saw them as a profit-orientated and IT-focused company – but VSO helped in seeing the social development angle of the work and in understanding that IBM were offering expertise in areas other than IT. As HWA's director stated, "VSO has created a platform for understanding between HWA and IBM volunteers from design up to implementation".

Samarthanam in Bangalore regarded their own passion for volunteerism as aligning well with VSO's mission and, as with HWA in Varanasi, stressed the importance of VSO in playing a mediating and facilitating role. As one of their senior managers said in relation to the role of VSO, "I prefer to have a catalyst to understand the needs of the corporate and the NGO – the blend is very important".

**Recommendation:** VSO should look to further embrace and develop its expertise as a key facilitator and catalyst in employee-based volunteer schemes. Helping to find alignment across organisational mandates, develop evidence-based shared objectives, managing expectations, integrating different schemes into more systemic programmatic interventions, providing high-quality pre-placement briefing and induction and organising during-placement logistics are all areas where VSO adds value and can look to develop further.

### Developing systemic programming approaches

The evaluation found encouraging evidence that the first two IBM CSC cycles with VSO in Varanasi and Bangalore both formed part of and had helped in the development of a more integrated and systemic programmatic approach. For example, VSO's work with Samarthanam was closely linked to VSO India's strategy of working with people with disabilities that also involved significant collaboration with government. Through this collaboration, VSO India was able to place two volunteers from another corporate client with the Ministry of Rural Development, thereby integrating volunteers and participants from different schemes into a coherent programmatic approach. VSO India thereby added value beyond the sum of its parts by leveraging the contributions of multiple schemes and focusing them toward bringing about systemic change. This case also highlights how an organisation such as VSO can play a key facilitating role and how multiple partners can support distinct interventions whilst also contributing to greater change.

Senior members of Samarthanam staff observed that these links had helped in their gaining of accreditation as a government 'skilling' provider. For VSO India, it meant that in the subsequent IBM CSC cycle in Mysore, they could place participants with Programme Implementation Agencies (PIAs) of the Ministry of Rural Development. This has helped further strengthen relationships with government and future cycles are set to strategically align and support the national programme. The roll-over affect across IBM cycles did not feature within the individual case studies but points to the importance of embracing the potential of such schemes as long-term integrated interventions.

**Recommendation:** Significant potential exists to increase the impact of such schemes, beyond individual partner organisations, by adopting a more integrated, systemic and programmatic approach to bringing about change. Rather than standalone cycles, the placements should be seen from a longer-term perspective and linked together – potentially across different employee-based volunteer schemes and other development interventions. Facilitating and brokering organisations such as VSO have a potentially key role to play in managing this process.

### Overall assessment of impact

In both the Varanasi and Bangalore cases, the evaluation found notable examples of positive development impacts. Furthermore, although other contextual factors have been important, to a reasonable degree of confidence it is fair to say that the work of IBMers contributed to these changes. In terms of learning on the role of corporate employee-based schemes, the evaluation found it useful to consider outcomes and impacts in terms of three interrelated categories.



Firstly, there were the key deliverables and often expected changes that came about as a result. In the case of Varanasi, this was the use of the financial management tool by self-help groups and the subsequent positive impact on their members. The production of branding and marketing advice was also seen to help some artisans in directly communicating with buyers, thereby reducing transport costs. In Bangalore, the business expansion strategy provided an evidence base and reference point, whilst the pipeline management and excel spreadsheets helped with financial planning and review.

Secondly, there were the more unexpected consequences of those key deliverables. In Bangalore, this could be seen in relation to the effect the expansion strategy had on organisational critical thinking, processes and confidence. And thirdly, there were changes resulting from the ways in which the participants in the scheme worked. In Varanasi this occurred through motivating local staff by working alongside them, and in Bangalore, the personal touch in building relationships helped to build trust, whilst their commitment inspired others to work in similar ways.

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