CNJG

COUNCIL OF NEW JERSEY GRANTMAKERS

Telling Your CSR Impact Story: An Outcomes Framework for a Portfolio of Programs

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Prepared by:

tcc group

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Agenda

I. Welcome and Introductions

Who We Are

in Tom Knowlton

Partner & Director of
Corporate Services

TCC Group

in Lisa Frantzen

Senior Evaluation Consultant

TCC Group

About Us

- TCC Group is a mission-driven consulting firm that collaborates with leaders to **solve complex social problems**.

- **We partner with companies, foundations and nonprofits** to help design and develop their strategic approach.

- Our knowledge and expertise in the social impact sector helps our clients **create high impact strategies and programs** addressing a range of important issues.

Clients Tackling Complex Social Problems
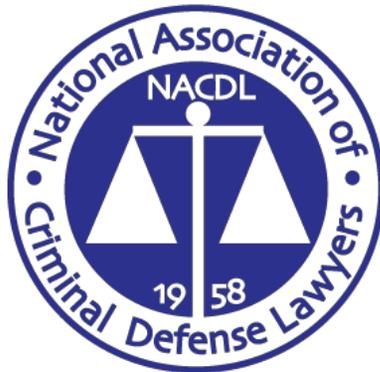
Our Corporate Clients

II. Context and Approach

Why is it important to strengthen your CSR impact story with a program outcomes framework?

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Drivers for this approach:

- Higher stakeholder expectations

- Stronger programs from companies

- Need to reinforce and support company goals

- Ability to build engagement and relationships with stakeholders

TCC's Corporate Citizenship Framework

Purpose and Values

Operations

Products & Services

Community

TCC's Corporate Citizenship Framework

	Description	Stakeholders
Operations	The issues relating to the company operations including environmental impact, workplace, diversity, etc.	Regulators, suppliers, community leaders, employees, advocacy groups
Products & Services	The impact (positive or negative) of a company's products and services on society.	Global / national stakeholders; employees, customers, shareholders, advocacy groups, government
Community	The relationship with the community where the company operates and where employees live and work.	Community leaders, employees, local nonprofits, local government

TCC's Corporate Citizenship Framework

Purpose and Values

Drivers

Operations

Products & Services

Community

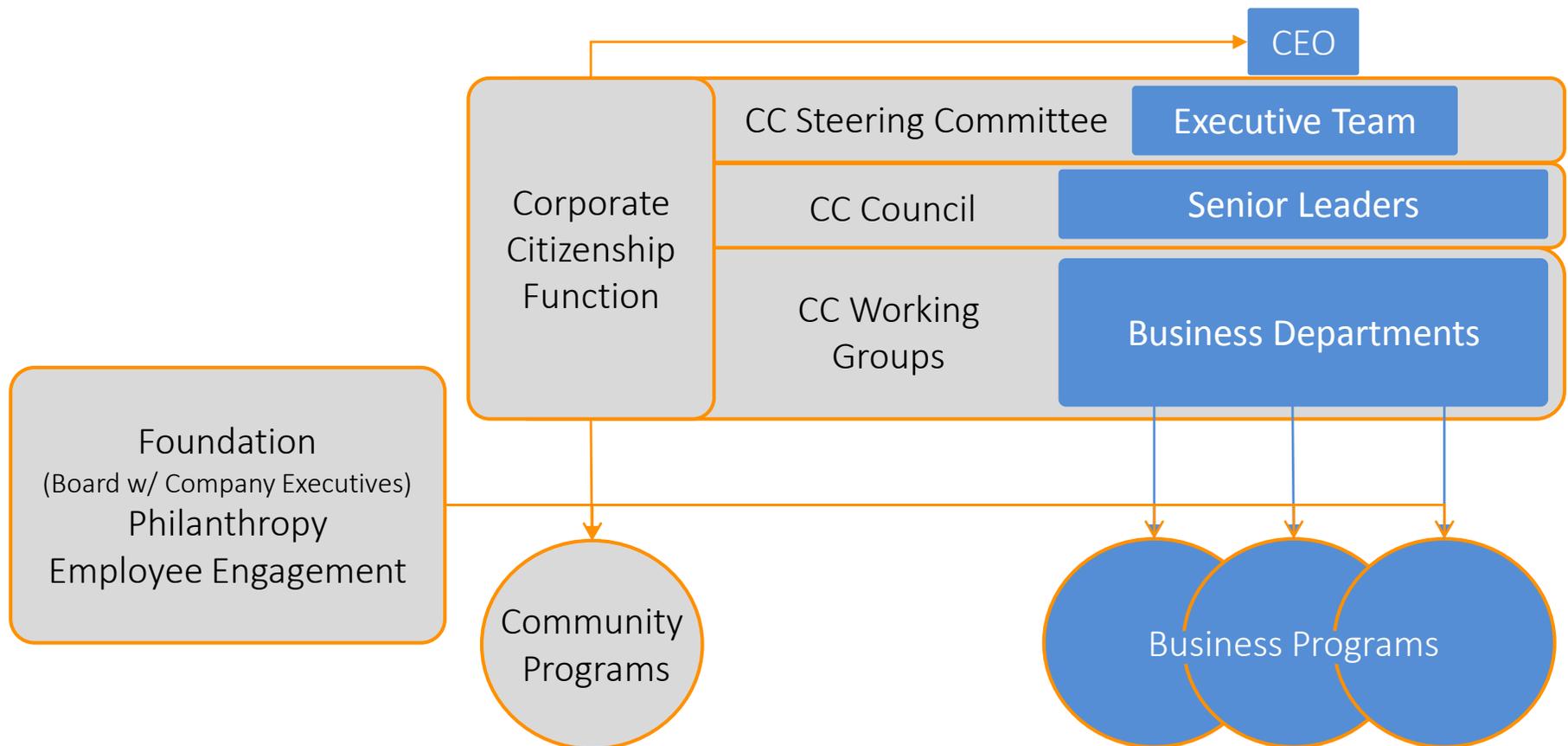|	Operations	Products & Services	Community
Issues	**Operational Impacts on Employees and Community**	**Impact on Society of the Company's Products and Services**	**Issues Important to Priority Community Stakeholders and Employees**
Programs	Company develops policies and programs to address operational impacts	Products and services are developed and refined to reinforce the company's purpose and mission	Programs and activities are designed to meet local/regional priorities

Corporate Citizenship Function

Corporate Citizenship Structure

Culture, Leadership and Adaptive Capacity

Management and Systems Capacity

Sample Corporate Citizenship Structure Model

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Corporate Citizenship (CC) leaders engage company leaders and departments to ensure the effective development and implementation of programs.

CEO

Corporate Citizenship Function

CC Steering Committee — Executive Team

CC Council — Senior Leaders

CC Working Groups — Business Departments

Foundation
(Board w/ Company Executives)
Philanthropy
Employee Engagement

Community Programs

Business Programs

Program Development Process

Sample Roles & Expectations Matrix

Stakeholder Engagement	Goal Development Stages				
	Identifying Goals to Refine	Refining/ Developing Goals	Developing Logic Model	Selecting Priority Indicators	Integrating Into CSR Impact Story
CSR Leaders	✓	✓	✓	✓	✓
CEO/Senior Leaders	✓	✓			✓
Executive Champions		✓			✓
Communications		✓		✓	✓
Employees					✓
Trusted advisors		✓	✓	✓	✓
Partner Organizations/ Grantees		✓	✓	✓	✓
Community leaders/Govt. Officials		✓	✓	✓	✓
Direct beneficiaries		✓	✓	✓	✓

● Internal   ● External

Different Levels of Business Goals

Vision / Mission / Purpose Goals

Issue Goals

Program Goals

Program Goal Examples

Cybersecurity Training
Revised Goals

Increase diversity in the cybersecurity industry by engaging and training underrepresented minorities, women and veterans.

Goal 1 – Engage Diverse Students in Cybersecurity

Raise awareness of long-term career opportunities in cybersecurity

Goal 2 – Launch Diverse Populations in Cybersecurity Careers

Provide training, support and access to cybersecurity careers

Philanthropy Approach

Goal 1 – Increase # of Diverse Students Pursuing Studies in Cybersecurity
Raise awareness of long-term career opportunities in cybersecurity by:
- Identifying nonprofits providing in-school and afterschool cybersecurity training/education programs
- Mobilizing employees to volunteer in schools reaching diverse populations

TBD:
- Potential scope and reach based on: existing nonprofits with relevant programs; potential employee volunteers

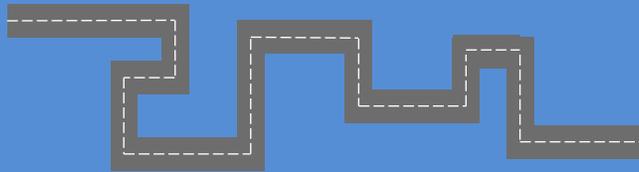**Goal 2 – Increase # of Diverse Individuals Launching Cybersecurity Careers**
Provide training, support and access to cybersecurity careers by:
- Recruiting and training underrepresented minorities, women and veterans
- Developing industry coalition committed to hiring trainees and providing internships and mentoring support

TBD:
- Potential scope and reach based on existing nonprofits with relevant training programs; potential role of community colleges; coalition development

Components of an Outcomes Framework

Logic Model/ Theory of Change

A systematic and visual way to present relationships among the **resources** you have to operate your program, the **activities** you plan to do, and the **changes** or results you hope to achieve.

Set of Core Indicators

Data which provide an **indication of performance** in terms of an agreed vision of success.

III. Program Development

Case Study: Symantec

Identifying the Goal

Identifying the Goal to Refine & Develop

- **Identifying the goal to develop includes the following steps:**

    - Understanding the company's framework

    - Identifying the priority company goals

    - Determining which program best aligns with company goals

    - Determining where goal refinement can have the greatest benefit to the company

- **Determining which stakeholders to engage in the process can be determined based on answers to the following questions:**

    - *How clear is the company's corporate citizenship framework and goals? Is there a need to engage senior leaders or senior CSR leaders?*

    - *Who can help determine where goal refinement can have the greatest benefit to the company?*

Mission
Help businesses harness the power of their information and make the digital world safer

Our People

Your Information

The World

Symantec's Corporate Citizenship Framework

tcc group

	Description	Stakeholders
Our People	Provide a work culture that supports professional training and development, fosters workplace inclusion and equality, and cultivates employee fulfillment.	• Customers (Corporate and Consumers) • Employees • Investors • Governments and Regulators • Community Members, Nongovernmental Organizations (NGOs), and Nonprofits • Suppliers
Your Information	Partner with customers, government agencies, communities and families to protect individuals and their information and ensure confidence in the online experience	
The World	We remain committed to conducting our business in an environmentally sound manner, upholding ethical and social standards in our company and supply chain and contributing to communities where we live and work	

Symantec's Corporate Citizenship Framework

Mission: Help businesses harness the power of their information and make the digital world safer

	Our People	**Your Information**	**The World**
Drivers			
Issues	**Diversity & Inclusion; Retention**	**Cybersecurity Workforce Gap; Online Safety**	**Energy & Greenhouse Gases; Supply Chain; Community Investment**
Accountable	Human Resources	Cybersecurity Training: Philanthropy Online Safety: Consumer Business Unit	Environment: Workplace Solutions Supply Chain: Product Teams and Procurement Community: CR
Supporting	Corporate Responsibility Department: Environmental Responsibility/Diversity & Inclusion/Employee Engagement/Philanthropy/Stakeholder Engagement		
Resources	Philanthropy; Employee Volunteers; Product Donations		

A Priority for the CEO

"*Symantec is the global leader in cyber security. What we do, at Symantec, is not just a job – it's a calling, demonstrated by our mission to keep the world's information safe and reflecting our fundamental commitment to make the world a better place.*

While the threat to information grows exponentially, there is a real shortage of qualified candidates to join the fight against cybercriminals. ***For the past two years, we have fostered the talents of young adults – including people of color, women and veterans to help fill the workforce gap in cyber security.***"

Greg Clark, CEO
Symantec

Symantec's Cyber Career Connection (SC3) program was selected for the following reasons:

- The program strongly aligned with and supported several priority issues for the company relating to Talent & Culture and Diversity & Inclusion

- The program goals were broad and general; the CSR team knew the impact goals could be strengthened

- The CSR team had accountability for this program, and knew the goal could be refined and developed through an internal process

Discussion Questions

- Does your company have a clearly defined corporate citizenship framework with clear goals?

- Has your company identified priority goals?

- Which program best aligns with priority company goals?

- Where can goal refinement have the greatest benefit to the company?

Refining & Developing the Goal

Refining & Developing the Goal

- Refining and developing the goal includes the following process:

    o Assessing priority stakeholder expectations – what do they expect the company to accomplish and how can this program align with and support that company goal?

- Determining which stakeholders to engage in the process can be determined based on answers to the following questions:

    o *Who is accountable for the company goal – who do you need to work with to determine the programmatic goal that best aligns with the company goal?*

    o *Which stakeholders are driving the goal? Do they need to be involved in helping to set the goal?*

    o *Which senior leaders will communicate the impact of the goal? Which ones will be a champion and also support the use of resources to achieve the goal?*

Cybersecurity Training

Excite, engage and educate 1 million students in STEM education through global nonprofit partnerships, with an emphasis on computer science and cybersecurity, by 2020 with an investment of $20 million.

Phase 1 – Excite: Introduce students to cybersecurity and computer science

Phase 2 – Recruit, Train and Certify: Trainings

Phase 3 – Prepare for Jobs: Internships

Phase 4 – Launch Careers: Job placement support services

Cybersecurity Training
Revised Goals

Increase diversity in the cybersecurity industry by engaging and training underrepresented minorities, women and veterans.

Goal 1 – Engage Diverse Students in Cybersecurity

Raise awareness of long-term career opportunities in cybersecurity

Goal 2 – Launch Diverse Populations in Cybersecurity Careers

Provide training, support and access to cybersecurity careers

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Raise awareness of long-term career opportunities in cybersecurity by:
- Identifying nonprofits providing in-school and afterschool cybersecurity training/education programs
- Mobilizing employees to volunteer in schools reaching diverse populations

TBD:
- Potential scope and reach based on: existing nonprofits with relevant programs; potential employee volunteers

Goal 2 – Increase # of Diverse Individuals Launching Cybersecurity Careers
Provide training, support and access to cybersecurity careers by:
- Recruiting and training underrepresented minorities, women and veterans
- Developing industry coalition committed to hiring trainees and providing internships and mentoring support

TBD:
- Potential scope and reach based on existing nonprofits with relevant training programs; potential role of community colleges; coalition development

Goal 1 – Increase # of Diverse Students Pursuing Studies in Cybersecurity

- Raise awareness of long-term career opportunities in cybersecurity, with a focus on reaching underrepresented minorities

Approach: Reach/educate diverse students in underserved communities with information about cybersecurity careers; build employee engagement component where possible.

- Partner with national nonprofit capable of reaching students. Selection criteria include:

   o Experience working in schools or after school programs, middle school age and older

   o Primary focus on reaching minorities and underserved communities

   o Ability to organize volunteers where appropriate

   o Reach aligns with Symantec employee locations

   o Experience/knowledge in STEM and technology preferred

Goal 2 – Increase # of Diverse Individuals Launching Cybersecurity Careers

- Provide training, support and access to cybersecurity careers

Approach: Recruit, train and provide support and access to cybersecurity careers for underrepresented minorities, women and veterans

- **Training Program** – Identify nonprofits and community colleges capable of meeting training standards and reaching target audiences

- **Career Access Program**

  o Develop industry coalition committed to hiring trainees and providing internships and mentoring support.

    ▪ Coalition members agree to minimum hiring requirements as well as providing support to training partners

Discussion Questions

- What are the expectations of priority stakeholders and how can this program align with and support that company goal?

- Who is accountable for the company goal – who do you need to work with to determine the programmatic goal that best aligns with the company goal?

- Which stakeholders are driving the goal? Do they need to be involved in helping to set the goal?

- Which senior leaders will communicate the impact of the goal? Which ones will be a champion and also support the use of resources to achieve the goal?

Outcomes Framework

What is an Outcomes Framework?

A framework that clearly maps out the **desired benefits (outcomes)** that the initiative/program is trying to achieve, the **causal links** to achieving those outcomes, and the **measurements** that will be used to assess progress towards the end goal.
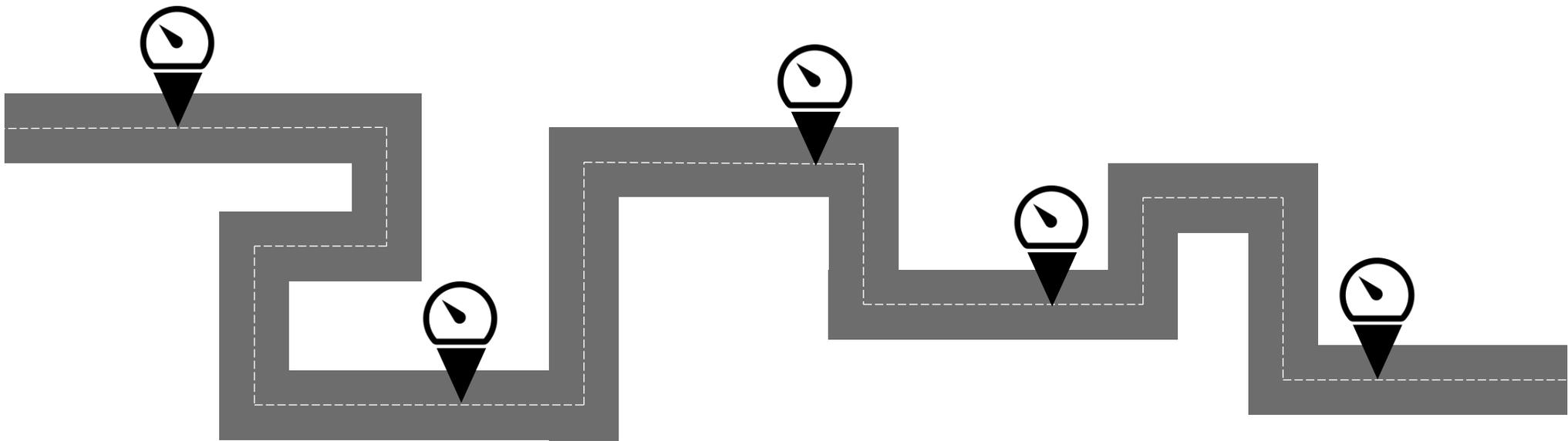
Why do we use an Outcomes Framework?

- **Clarify** our strategy and desired outcomes

- **Test** a series of **hypotheses** or working assumptions about our program

- **Learn** about the program **and refine its design** and activities

- Understand **which partners** make the best fit for achieving our goals

- **Show the value** of the work to internal stakeholders

- **Tell the story** of the work
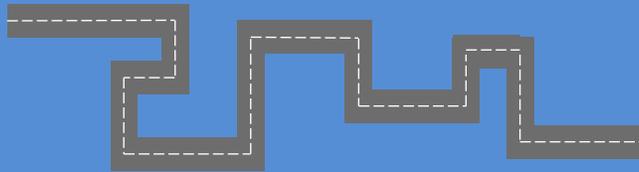
Components of an Outcomes Framework

Logic Model/ Theory of Change

A systematic and visual way to present relationships among the **resources** you have to operate your program, the **activities** you plan to do, and the **changes** or results you hope to achieve.

Set of Core Indicators

Data which provide an **indication of performance** in terms of an agreed vision of success.

Start with your goal.

Symantec. **Cybersecurity Training Program Goal 1 Logic Model**

Impact

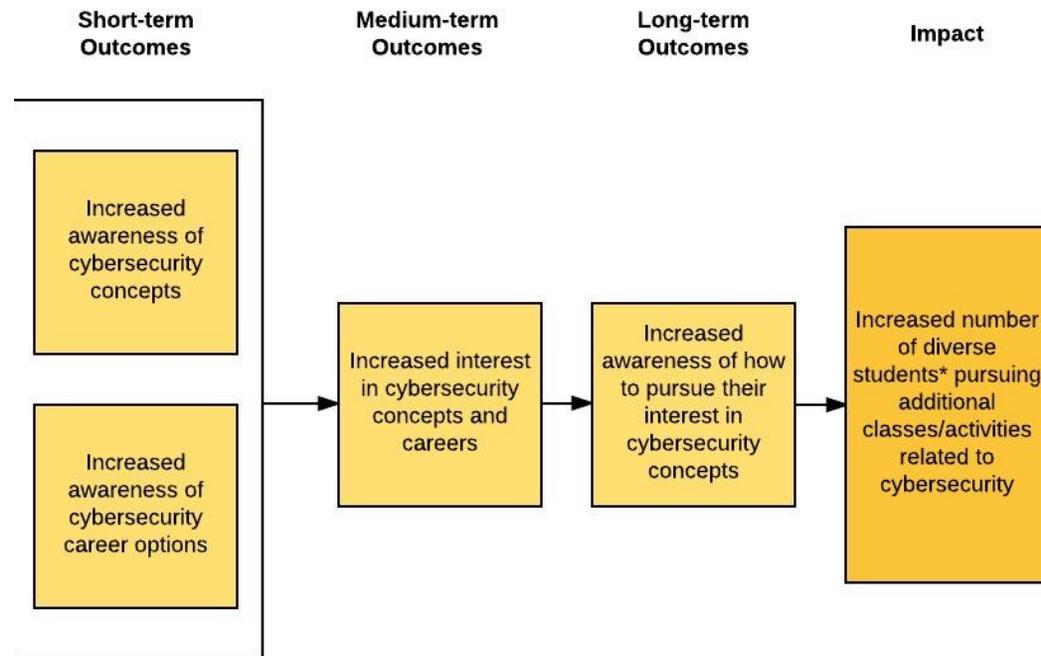Increased number of diverse students* pursuing additional classes/activities related to cybersecurity

*Diverse students = underrepresented minorities and girls, ages 10-18

Building a Logic Model

Then build the logical sequence of outcomes that must occur to reach your goal.

Symantec.

Cybersecurity Training Program Goal 1 Logic Model

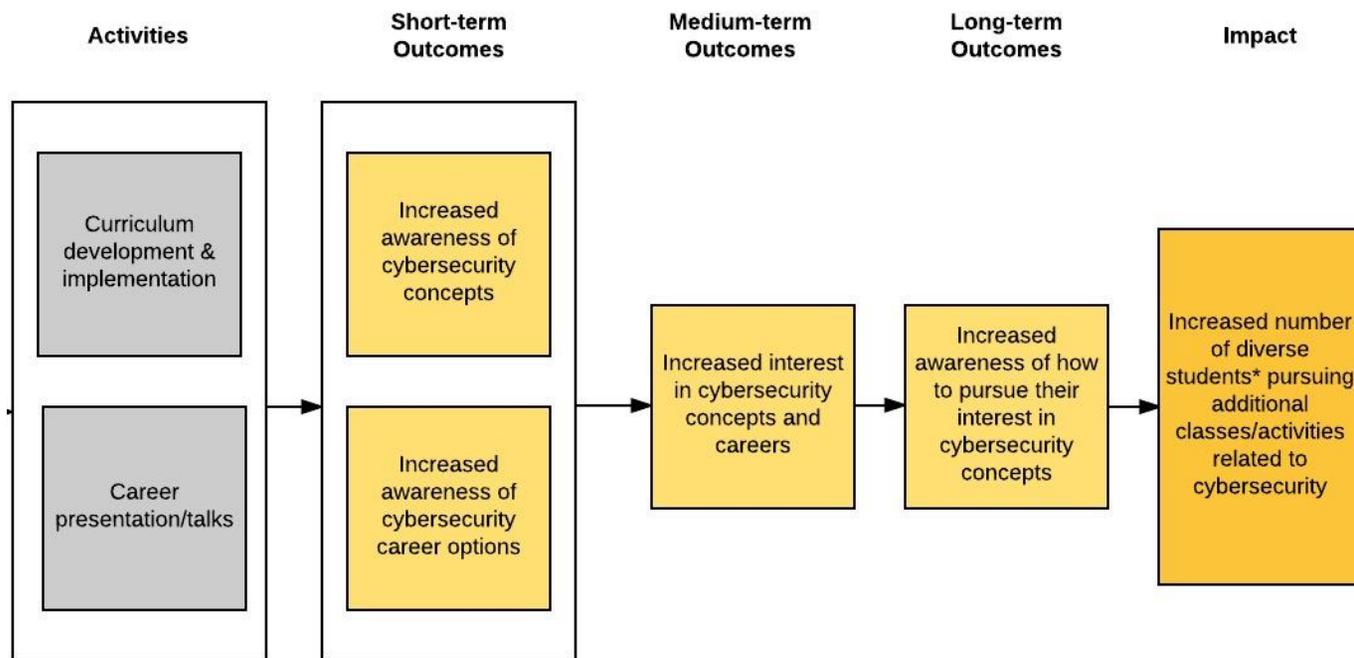| Short-term Outcomes	Medium-term Outcomes	Long-term Outcomes	Impact
Increased awareness of cybersecurity concepts	Increased interest in cybersecurity concepts and careers	Increased awareness of how to pursue their interest in cybersecurity concepts	Increased number of diverse students* pursuing additional classes/activities related to cybersecurity
Increased awareness of cybersecurity career options			

*Diverse students = underrepresented minorities and girls, ages 10-18

Building a Logic Model

Now think about the types of interventions that will help create these initial desired changes.

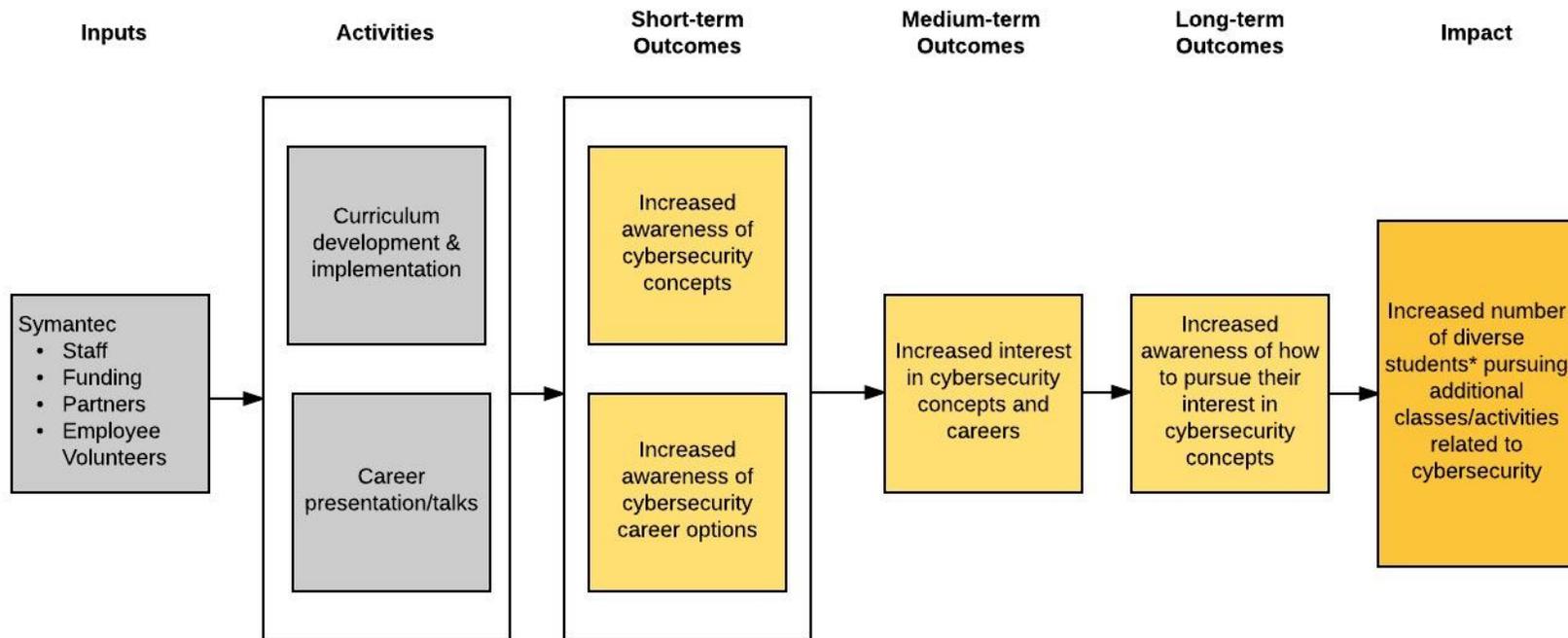Cybersecurity Training Program Goal 1 Logic Model

Activities	Short-term Outcomes	Medium-term Outcomes	Long-term Outcomes	Impact
Curriculum development & implementation	Increased awareness of cybersecurity concepts	Increased interest in cybersecurity concepts and careers	Increased awareness of how to pursue their interest in cybersecurity concepts	Increased number of diverse students* pursuing additional classes/activities related to cybersecurity
Career presentation/talks	Increased awareness of cybersecurity career options			

*Diverse students = underrepresented minorities and girls, ages 10-18

Building a Logic Model

Finally, add in the investments that you will make to support these interventions.

Symantec.   Cybersecurity Training Program Goal 1 Logic Model

| Inputs	Activities	Short-term Outcomes	Medium-term Outcomes	Long-term Outcomes	Impact
Symantec • Staff • Funding • Partners • Employee Volunteers	Curriculum development & implementation Career presentation/talks	Increased awareness of cybersecurity concepts Increased awareness of cybersecurity career options	Increased interest in cybersecurity concepts and careers	Increased awareness of how to pursue their interest in cybersecurity concepts	Increased number of diverse students* pursuing additional classes/activities related to cybersecurity

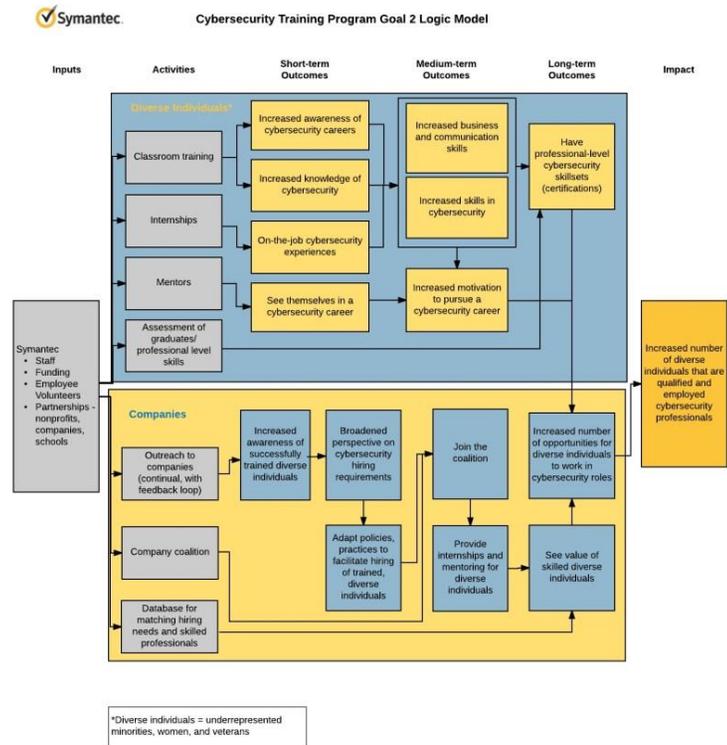*Diverse students = underrepresented minorities and girls, ages 10-18

Completed Logic Model(s)

You may have more than one logic model if your goals vary or if your target populations are different.

Goal 1 Logic Model

Goal 2 Logic Model

Considerations for Logic Model Development
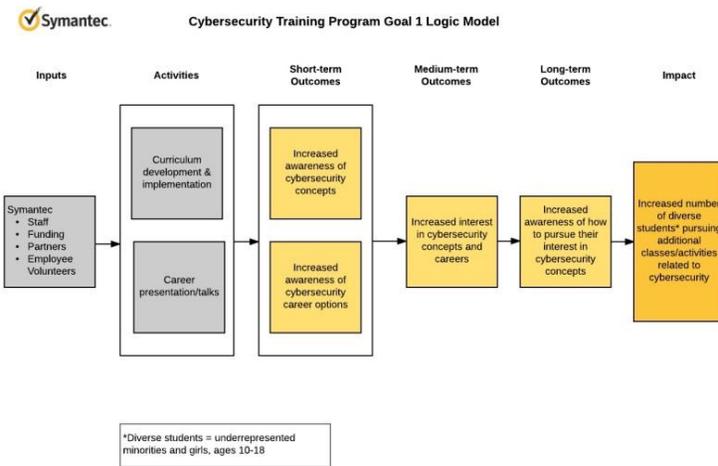
- Work with internal stakeholders

- Work with grantees or external partners

- Build on existing evidence

- You can have more than one logic model

- Logic models are not meant to be static

Discussion Questions

- What experiences do you have in working with logic models?
- What benefits have you derived from having a logic model?
- What challenges have you faced and how did you resolve them?
- What stakeholders have you included in developing or using your logic model?

Prioritizing Data Collection

What is one type of data that you wish you had?

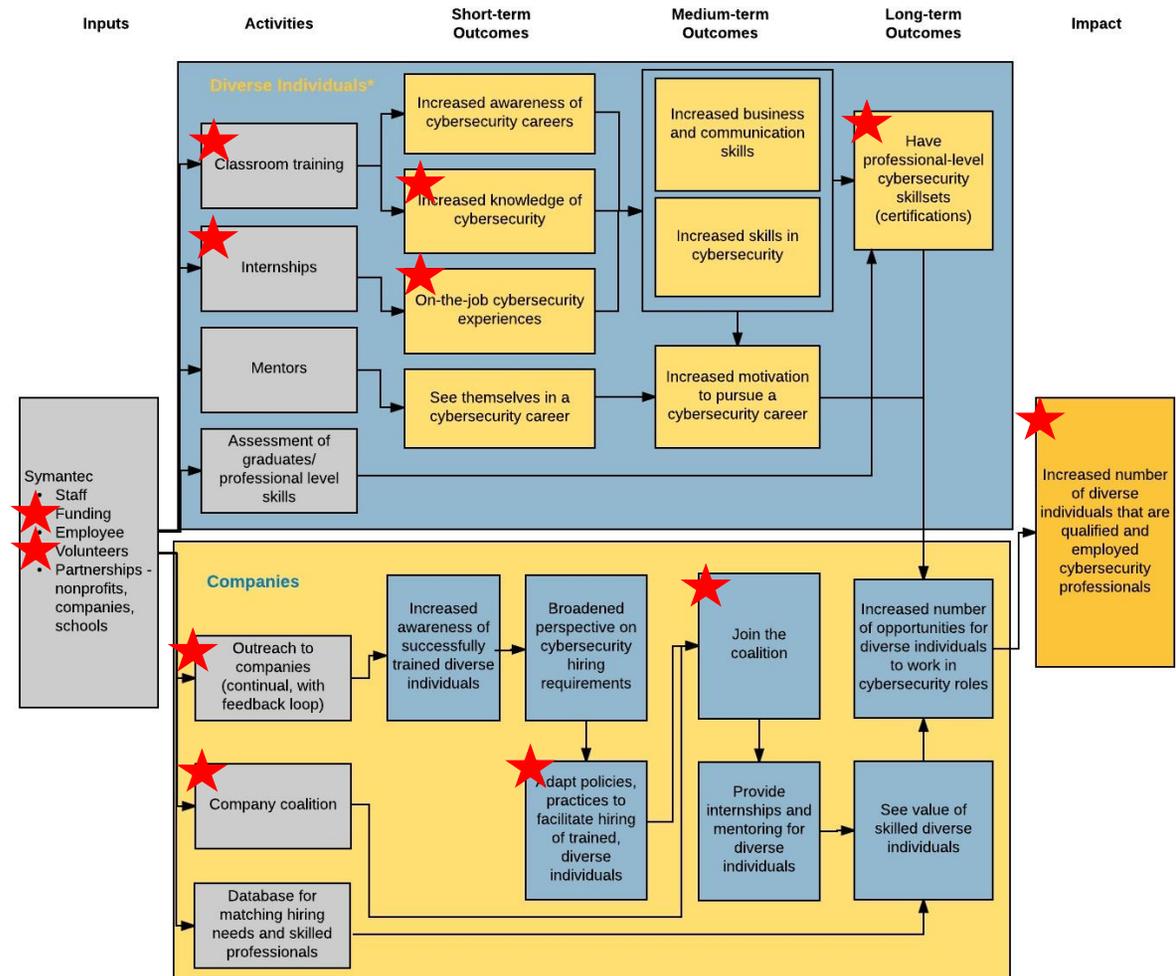*With which audience would you share that data?*

Prioritize sections of the logic model according to:

- Importance

- Feasibility to collect data

- Usability

Developing Your Core Indicators & Data Collection Plan

Indicator	Data Source	Timeframe for Collection
% of participants who apply the cybersecurity skills in a job setting	Salesforce	Annually
Narrative description of participants' experiences	Student interviews or survey	Annually

Symantec. Cybersecurity Training Program Goal 2 Logic Model
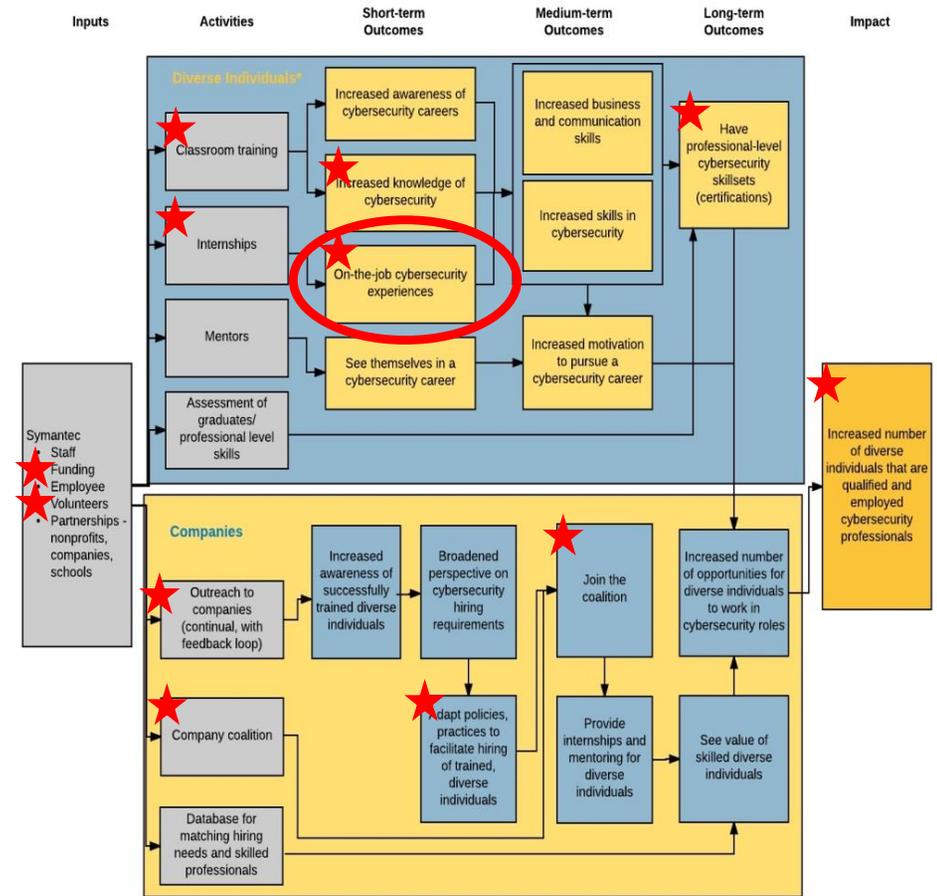
*Diverse individuals = underrepresented minorities, women, and veterans

Considerations for Developing a Set of Core Indicators

- Can be aggregated across grantees

- Give a strong indication of outcome achievement

- Can be mix of qualitative and quantitative

Discussion Questions

- Have you been through an indicator development process? If so, was it tied to a logic model?

- Could you see yourself using an indicator development process such as this? If so, what benefits do you foresee?

- Do you foresee any challenges?

- What stakeholders would you involve in a process like this?

Integrating Into CSR Story

Using Dashboards

Symantec Cybersecurity Training Program   August 2017

MOCK DASHBOARD FOR ILLUSTRATION PURPOSES - ACTUAL DATA NOT USED

	2015	2016	2017

Program Inputs

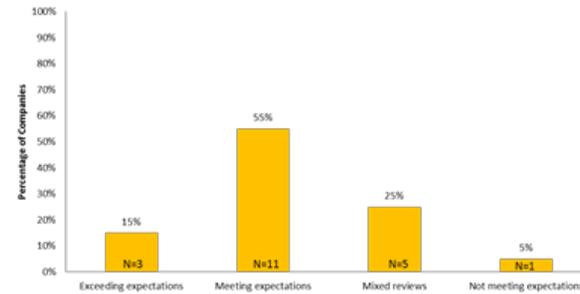|	2015	2016	2017
# of dollars invested('000s)	50	100	150
# Symantec employees who volunteer annually with the Cybersecurity program	475	635	1096
# total hours invested by Symantec volunteers	1900	3800	5500
# of program partners	3	4	4

Short-term Outcomes - 2017

% of students that increase their awareness of cybersecurity concepts — **88%**

% of students that increase their awareness of cybersecurity careers — **75%**

Program Participants - 2017

Total # of program participants — **300**

% Female/Male

- Female: 55%
- Male: 45%

Racial/ethnicity diversity of participants

Black or African American	White	Bi-racial or multi-racial	Asian	American Indian or Alaska Native	Native Hawaiian or other Pacific Islander
45%	27%	15%	7%	5%	1%

Companies' overall impression of the cybersecurity interns

	Exceeding expectations	Meeting expectations	Mixed reviews	Not meeting expectations
	15% (N=3)	55% (N=11)	25% (N=5)	5% (N=1)

Narrative description of participants' experiences - 2017

"I'm really excited to come into my job. I don't even mind that I work the night shift."
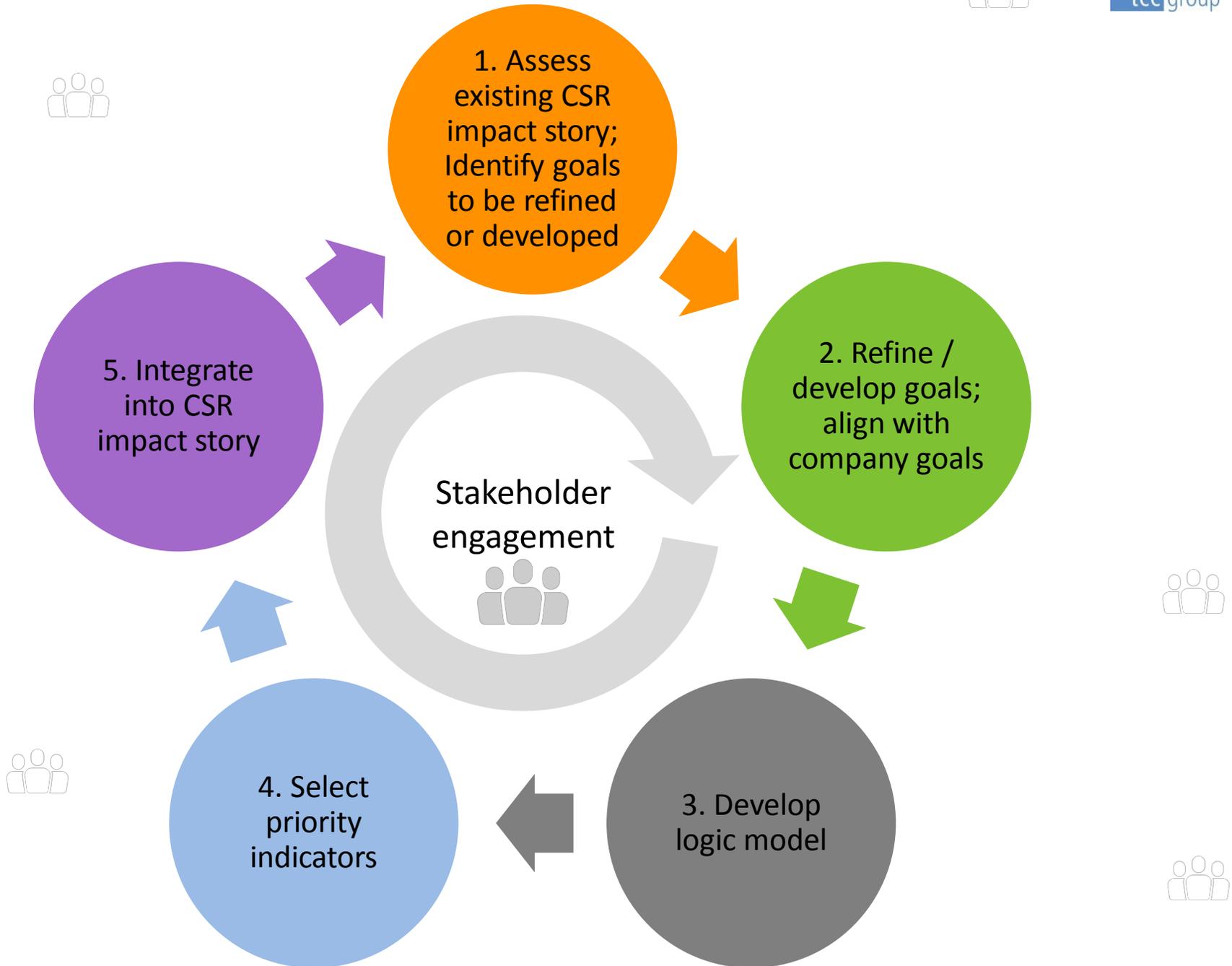
"The training provided me with a good foundation of cybersecurity skills. Although I still have a lot to learn, I feel more confident in my knowledge and skills."

Integrating New Goal into CSR Story

- The revised SC3 program goal is being included in the Corporate Responsibility Report.

- The CSR team is ensuring senior leaders are knowledgeable about the new goal and communicating to stakeholders via internal steering committees.

- The CSR team is working with their major nonprofit partners to more clearly track and communicate outcomes.

Summary Overview

Program Development Process

1. Assess existing CSR impact story; Identify goals to be refined or developed

2. Refine / develop goals; align with company goals

3. Develop logic model

4. Select priority indicators

5. Integrate into CSR impact story

Stakeholder engagement

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Session Takeaways

Clarifying Your Goals

Share your Mission / Vision:
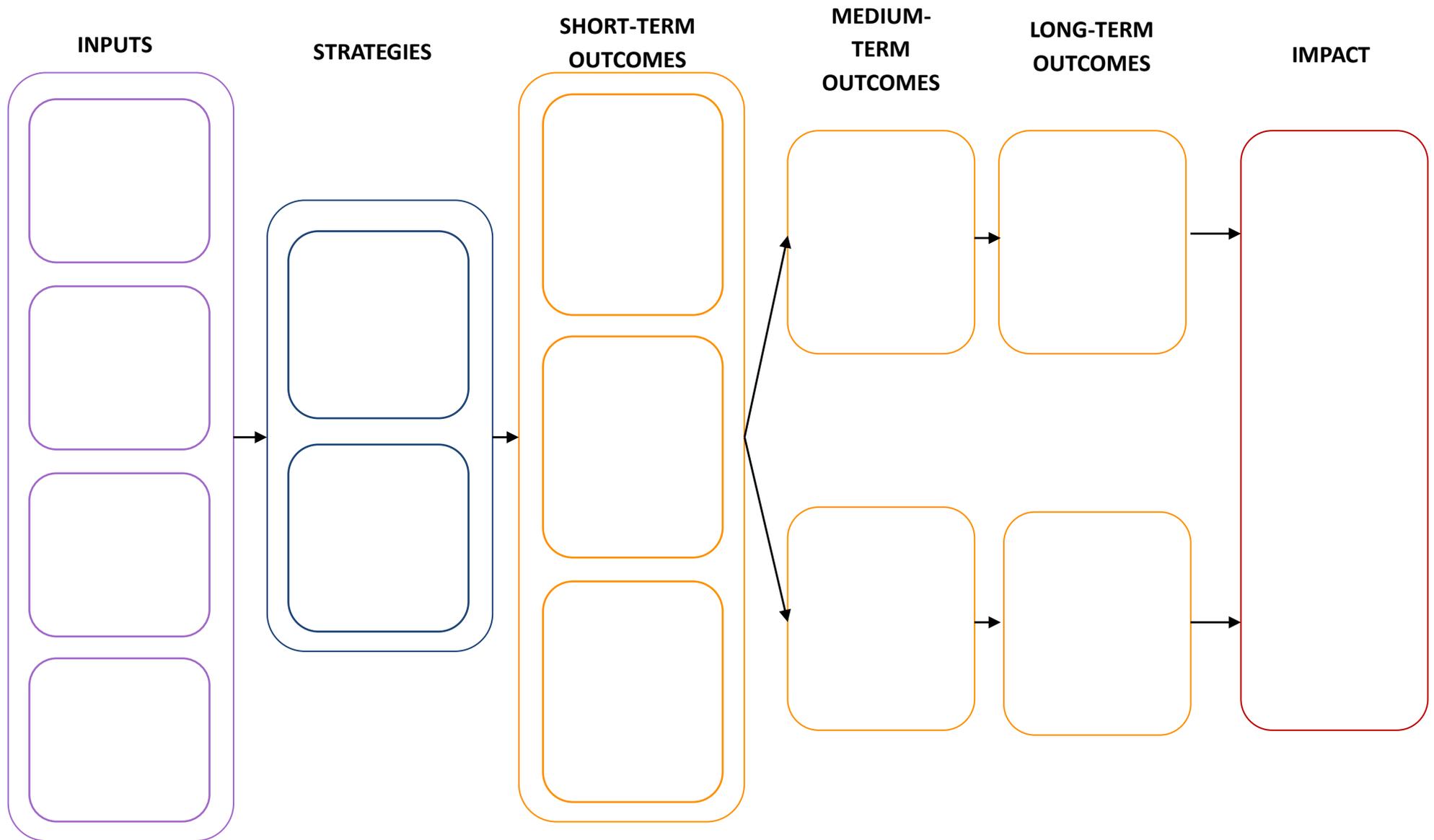

Purpose

Community

Operations

How might you define these three pillars?

List all of the issue areas / initiatives underneath each pillar.

Identify the measurable goals for each issue area.

Building Your Outcomes Framework

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INPUTS   STRATEGIES   SHORT-TERM OUTCOMES   MEDIUM-TERM OUTCOMES   LONG-TERM OUTCOMES   IMPACT

UPON COMPLETION OF YOUR LOGIC MODEL—Circle your priority areas based on: importance; feasibility to collect data; and usability.

Develop a Set of Core Indicators

For each priority area that you circled in your logic model, identify the core indicator(s) for each. Core indicator(s) are data that provide an indication of performance in terms of an agreed vision of success.

Core indicators: 1) can be aggregated across grantees; 2) give a strong indication of outcome achievement; and 3) can be a mix of qualitative and quantitative data (e.g., short-term outcomes, investment dollars, grantee stories).

Indicator	Data Source	Timeframe
EXAMPLE: % of students with increased positive attitudes towards school	Education portfolio grantees	Annually

Create a Communications Plan

Audience	Content Type	Core Indicators	Timing	Responsible
EXAMPLE: CSR Team	Internal Review	All progress indicators, grantee feedback	December	Entire team

Questions?

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