

WHITE PAPER

Building a Skills-Based, Remote Volunteer Program - A Look Into 12 Years of Partners in Food Solutions Operations





**We see volunteers
and clients
accomplish large,
complex projects
together through
remote teamwork
because we set
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collaboration in
mind.**

In 2007, U.N. Secretary General Kofi Annan and General Mills CEO Ken Powell had a transformative conversation at the World Economic Forum in Davos, Switzerland. Annan asked Powell to consider how a large food company like General Mills could help address food security issues in Africa. It led Powell and General Mills to figure out a way to leverage their assets to help. Partners in Food Solutions (PFS) was then conceived of by a small group of ambitious and innovative General Mills employees who found that offering the specialized knowledge of their company's employees to existing food processing companies in Africa could be the most effective way to help strengthen the food system on the continent, benefiting everyone from farmers to consumers. They created a remote, skills-based volunteer program to provide business and technical support for small-and-growing food companies in Africa.

From these early days as an internal General Mills initiative, PFS has grown to a consortium of seven world class food companies – Ardent Mills, Bühler, Cargill, DSM, General Mills, The Hershey Company, and J.M. Smucker Company – with more than 800 years of collective experience. PFS now has 25 employees around the world. We also work with more than 30 field-based contract staff via our partner programs. The global PFS team works to connect food industry professionals from our corporate partners with promising food companies in Africa. Since our founding 12 years ago, we have made significant investments in staffing, processes, and technology as part of our organization's "philosophy of innovation." Throughout that time, over 1400 volunteers have shared their time and expertise to reach over 1,500 African clients.

This paper is based on input from the three key teams that make our day-to-day work successful: our Volunteer Operations team who recruit and match volunteers, our Program Associates who oversee volunteer engagements across several programs and countries, and our Program Managers who serve as trusted advisors to clients and craft the projects that they work on with our corporate volunteers. This is a diverse, dynamic group of global professionals who are each deeply committed to bringing as much value as possible to both clients and volunteers. This paper is intended to share our best practices around building and continuously improving a remote, skills-based volunteer program.

For any organization looking to create this type of volunteer program, our operations team has reflected on best practices that we've developed through much trial and error over time. This is our examination of the core components of our work in the order they tend to take place within a project cycle.



VOLUNTEER RECRUITMENT

We continuously recruit new volunteers in order to expand our pool of available experts to work with our clients. We often do this recruitment through diverse and engaging events and communications. Recruitment efforts include informational sessions with corporate partner employees, events featuring influential business leaders, field staff or clients, engaging key corporate leaders in identifying potential volunteers with needed expertise, and featuring PFS prominently at corporate events such as Bühler Networking Days or the General Mills Bell Technology Conference. Many of these events have now switched to a virtual format which has allowed us to more easily include our African field staff and clients, who otherwise would not be able to attend in-person events regularly.



Effective recruitment methods can vary by partner. At some corporate partners, our leadership champions are our primary recruiters of volunteers. At others, it is more word of mouth, where the PFS volunteer experience speaks for itself. Volunteer promoters who have had a great experience are often willing to help us find other great volunteers among their internal networks. In Europe, where PFS has a smaller volunteer footprint and there is a less established culture of volunteerism, we've positioned a PFS staff member there who had previously worked for a corporate partner to be more hands-on with Europe-based corporate partners and volunteers.

Once a volunteer registers, a variety of informational materials, tools and volunteer guides are shared. Optional onboarding sessions with a Volunteer Associate is also available. These onboarding materials are not customized to clients and can serve as great informational guides for new volunteers.



SCOPING VOLUNTEER OPPORTUNITIES WITH A CLIENT

Volunteer engagements need to have clear goals so that we can match clients with the right expert. A field-based Program Manager and the client will work closely together to understand key pain points that the business is experiencing and ultimately articulate clear problem statements. From there, a Program Manager will draft one or more project charters to serve as a detailed roadmap of each project. These charters shape the volunteer engagement by setting objectives and defining project steps that are achievable within the scope of the remote volunteer model.

We have found that setting up successful engagements should always start with two things – first, the client’s motivation to engage. We often say that we work on a “pull model,” meaning that we only work on projects that a client asks for and prioritizes. In effect, they “pull” the expertise from us, we don’t “push” them into prescribed generic solutions. Second, engagements should be clearly structured from the beginning using well-scoped project charters that include transparent and realistic timelines, objectives, and deliverables. Every project starts with a kick-off call where our Program Managers walk the client and volunteers through the project charter to preview what’s ahead and answer questions.

IDENTIFYING AND MATCHING VOLUNTEERS’ SKILLS TO AN OPPORTUNITY

When registering with PFS, volunteers self-identify their primary areas of expertise. Client projects are organized into the same expertise categories, and that is how we narrow the pool of potential volunteers for a given assignment. From there, the volunteer operations team reviews volunteer profiles where they have shared their educational focus, commodity expertise, other relevant expertise and motivations for getting involved with PFS. Together, these typically tell us whether the individual would be a good fit for the scope of work and whether they would be using their preferred skills on a project. We also have an interactive page on our online volunteer hub where volunteers can select opportunities that interest them. We do not extensively vet the volunteers’ skills because they have already been hired by a world-class food company. We also place two to three different volunteers on a project to offer complementary expertise to meet the client’s needs.

PFS has diversified volunteer opportunities to engage volunteers whose skills are not as frequently requested by clients. Any employee of our corporate partners can volunteer with PFS. We offer several options for generalist roles that do not require a specific area of expertise. We have the Client Lead role, who leads all volunteer engagements with one client. A volunteer of any background can be a successful leader in facilitating the remote teams serving a client. These volunteers utilize and develop skills in project and relationship management. Mentorship is another opportunity where volunteers can serve, regardless of their expertise, as long as they are a good match with the person who they are mentoring. We have also utilized volunteers in developing other PFS programmatic offerings – for example, a group of learning and development professionals from General Mills and Cargill came together to support our partner organization, TechnoServe, in developing a new format for sector-wide training that focused on experiential and outcome-based

learning. Those volunteers helped create the curriculum that was subsequently used in four countries to train hundreds of clients on food quality and safety.

Offering a variety of volunteer engagement types gives our volunteers more ways to get involved. It also helps us attract talent that covers both a wide range of knowledge areas as well as individuals with very specialized expertise. In fiscal year 2020, approximately 30 percent of engaged volunteers participated in more than one project or other engagement. These volunteers offered expertise in 25 different areas in their engagements with clients. However, 50 percent of all projects fell under just one category, research and development, which includes food safety and quality, product development, and process development.

There are times when we need volunteers who have experience working in processing plants or may be located outside of a company’s headquarters location. Our remote volunteering model gives them the opportunity to participate without having to travel. We often find that volunteers located outside of their company’s headquarters or regional hubs find even greater satisfaction in having a PFS volunteer opportunity through their company because other options might not be available to them. In order to reach these people, PFS builds relationships with company leaders and creates virtual events. Hosting dynamic virtual events promoted across the company can level the playing field for sites where the PFS team doesn’t often visit. It not only builds community within the company but gets people connected to the PFS cause. Building relationships with site leaders and plant managers to create buy-in and build awareness has helped us reach an important pool of technical experts.

VOLUNTEER ONBOARDING

The PFS model works because of our ability to connect teams from around the world remotely. Since our founding, technology and internet connectivity has come a long way and so have people’s attitudes towards remote engagements. When the COVID-19 pandemic hit, PFS volunteers were already ahead of the curve, comfortable with working remotely on international, cross-cultural teams, working across time zones, tackling language barriers, and innovating creative solutions on teams that never meet in person. Given these dynamics, we know it’s essential to prepare volunteers and set expectations for an experience outside of their comfort zone. We also have found through surveys of our volunteers that the impact their work has on clients is the primary motivating factor for volunteering.



They want to spend their time working on real solutions for our clients, not attending workshops or onboarding meetings. Over time, we have found that mandatory training isn't necessary for our volunteers. Instead, we focus our onboarding on setting appropriate expectations and encouraging volunteers to take on a learning mindset to build cross-cultural communication skills.

In an effort to set reasonable expectations early on, we share the following messages with all new volunteers:

- Everyone has something to offer
- Volunteering with PFS is flexible
- Projects can stretch your comfort with ambiguity and test your problem-solving skills
- You can gain exposure to emerging markets
- You can grow cross-cultural skills
- Challenges often lead to great opportunities for professional and personal growth
- You might not find a role that fits right away
- Communications logistics can sometimes be a challenge
- Be patient, but not too patient. Things might be slow but don't be afraid to ask questions of PFS staff, your team or client.

In addition to this messaging, we have developed concise guides for the most common volunteer roles to help them in getting started. PFS staff do one-on-one onboarding for volunteer leaders who are facilitating projects with a client or who are serving in specialized roles such as mentors. By not requiring up-front training, we minimize the work that volunteers need to do to get started once they sign up for an engagement. In all volunteer experiences, teams have a direct connection with a PFS Program Associate who is available to support them at any time throughout the course of the engagement. Because everyone feels more comfortable when they have more information, we make every effort to share details on the client and project as early as possible. Using client profiles, project charters and pictures, we try to build context from the very beginning. This is all collected and shared by our Africa-based Program Managers who are trained food technologists working directly with our clients in person. Having staff on the ground who can serve as a bridge between clients and volunteer teams ensures that this remote work is effectively addressing the needs of the client.

One of the distinctive offerings of PFS' remote, skills-based volunteering with African food companies is the opportunity for volunteers to connect with the dedicated staff at the client company, who are industry professionals of similar disciplines who have different backgrounds and work in a much different operating environment than the volunteers. In order to prepare volunteers for this novel opportunity, we've encouraged them to focus on exercising and developing the following skills:

- Open-mindedness
- Patience
- Flexibility
- Listening with a learning mindset
- Open communication

Our onboarding approach focuses on encouraging an open-minded learning mindset as well as constructive communication amongst our project participants. Our volunteers and clients bring their own individual experiences and approaches to work, in addition to the cultural context in which they live. We encourage teams to learn how to productively collaborate and get to know each other on a more personal level.

Overall, skills-based volunteering is a human-centered experience and we have found that our volunteers often just need encouragement to exercise and develop their learning mindset in order to be ready to be effective in their projects.

ENGAGING CLIENTS AND VOLUNTEERS ON REMOTE PROJECTS

Success for a remote, global team is all about developing positive working relationships. One of PFS' first volunteers from General Mills, who continues to serve our clients even into his retirement, is Dave Cummings. He says, "Team members that never meet in person might not naturally develop relationships. Despite that, PFS virtual teams often develop strong team dynamics." We have found that PFS must play a critical role in fostering a sense of teamwork. We see volunteers and clients accomplish large, complex projects together through remote teamwork because we set up teams with collaboration in mind.

One extraordinary benefit of remote volunteerism is connecting industry professionals who otherwise would not normally work together – across functional areas, geographies and corporate partners. This happens all the time at PFS. Many volunteers have shared with us how they would have never connected with a number of people even at their own company had they not been connected through a PFS volunteer experience. It is normal for volunteers from three different corporate partners, even living in three different states or countries, to join a project together and suddenly find that, while working on a problem for a client, they are also building connections with people in similar careers. For example, on one project to help a dairy company in Kenya develop a better animal feed there were volunteers from different companies working together remotely from three different countries: the United States, South Africa, and India. This is a feature of PFS that attracts volunteers to our program and enhances their experience. Their project not only benefits the client who received the service, it also brings the opportunity to collaborate and network with other members of their team.



SHARING PROJECT IMPACT

Much of what we understand about creating a positive remote volunteer experience was learned through a recent consumer insights study led by internal General Mills consumer insights and innovation consultants. The in-depth study mapped and studied the entire volunteer experience and interviewed volunteers from all corporate partners, from different areas of expertise and at all career stages and levels of responsibility. The group learned that volunteers have a variety of needs that help foster a satisfying volunteer experience, outlined in the graphic below.

Since this study, PFS has focused on sharing the tangible impact that volunteers have had on client businesses in order to demonstrate the value derived from their volunteerism. We heard from volunteers that they get the most satisfaction from understanding their impact on clients and communities, rather than attending events, or being appreciated over email. After engagements are completed, we have started following up with clients six months later to check on them. We’ve also created a feature in our Salesforce database for

capturing impact stories from clients which are then shared in our newly launched online volunteer hub, where volunteers can learn about the impact of the projects they worked on. We know that the impact of our projects are often not fully realized until after volunteers have recommended a solution. In an effort to understand implementation and the impact that is realized after a volunteer project, we regularly follow up on closed projects and share updates with volunteers that show the value their work has for a client over time.

In order to maximize volunteer time toward creating solutions for clients, we have learned we must minimize any administrative or logistical obstacles in our process that impact volunteers. This means limiting the steps it takes to sign up and join a project, and having PFS staff perform the administrative and technical tasks related to work with clients. In making these opportunities successful, it’s important to show the volunteers that there is a robust support system available. We want to empower our volunteers to share their expertise and make an impact, and that means giving them all the tools and resources to do so, without getting in their way.



CHALLENGES WITH THE MODEL

Remote programming faces multiple challenges. Here is what we've learned and what we have done to mitigate any issues.

1. Technology. Clients may be located in rural areas where they struggle to connect by phone or internet and Program Managers have to fill in the gaps when clients unexpectedly, or even regularly, are not able to connect to meetings. Even volunteers may struggle with connection issues or using a virtual meeting app like Zoom. We've developed a connectivity guide to share with volunteers and clients about how to join virtual meetings. Additionally Program Managers often do the extra work of collecting updates and requests from their clients before calls in case a client is ultimately unable to join.

2. Over commitment. Clients are still managing their businesses and often addressing significant challenges while also taking on a project with remote volunteers. Sometimes teams need more action or communication on the part of the client, who might be addressing other high-priority concerns. Likewise, volunteers are often full-time working professionals who have families and personal commitments that might affect their availability for meetings or work on project deliverables. Most of these challenges can be addressed with proactive and transparent communication, and setting expectations around time commitment and timelines for project deliverables.

3. Context around the problem. While we prioritize sharing information, pictures, and background at the beginning of the project, sometimes it takes having longer back and forth exchanges or sending videos for volunteers to really understand what is happening on the ground with the client so that they can find the best solution. There is no perfect substitute for being in person, although we've even gone so far as to do 360 degree, virtual reality video of our clients' facilities. Overall, our clients work in very different environments than our volunteers, and sometimes we have to make extra efforts to bring the client's working conditions to life for volunteers.

4. Barriers to implementation of projects. Sometimes clients are unable to implement project steps or volunteer recommendations. This can often be due to lack of resources, whether it is financial or logistical. Exogenous shocks like flooding, power shortages, poor harvests, or harm to a client's facility can interfere with the client's work. We try to work with clients on projects that they feel they can resource themselves, and we remain flexible to accommodate their needs as they address unexpected challenges that hinder their ability to implement.



PFS ADAPTATION OVER TIME

PFS is constantly evolving as we improve our processes and practices to create client engagements that drive impact and create a satisfying volunteer experience. This is what one of our first volunteers, Indra Mehrotra, calls a “philosophy of evolution.” Indra has seen PFS programs take on more structure and scale quickly by continuously adopting elements and methods that are successful, while eliminating things that do not serve our goal of creating impactful volunteer and client engagements. For example, until 2016, PFS had no administrative staff to facilitate client and volunteer engagements and relied on volunteers to manage much of our operations. We realized that the value volunteers bring is in sharing their expertise with clients, not taking on the task-heavy management of client and volunteer engagements. Recognizing that, we began to hire more operations staff to fill that need. Since then, we have built up a team of Program Associates, all based in Africa, who keep the volunteer teams connected and informed as they work with our clients.

In 2016 we shifted from exclusively doing programming with our implementing partner in the field, TechnoServe, to launching our own Direct Model program, hiring our own full-time permanent Africa-based staff. These Program Managers are career food technologists and, importantly, also serve as the relationship managers with our clients on the ground. They source and vet new clients and are ultimately responsible for building productive relationships by identifying high-value opportunities that our corporate partner volunteers can support with remote engagements. Having our own staff in place, we are able to cultivate enduring relationships with our most engaged clients.

While Program Managers focus on the relationship with the clients in their own country, Program Associates focus on the team dynamic and information sharing between clients and volunteers across several countries. Because they have deep engagement with many different

volunteer/client working groups, Program Associates share key lessons on how we can improve operational practices and are often the first to highlight impact stories to be shared with volunteers and other stakeholders.

We have also evolved the ways in which we work with African processors. Since working with Bain & Company on a multi-year strategic plan in 2018, we have focused our organization on identifying the clients with the highest potential in the markets where we work, and then forming enduring relationships with those clients to drive more impact over time. In order to identify these clients, we vet them according to the following criteria:

1. Capable and ethical leadership
2. Commitment to “pull” for PFS support
3. Access to finance needed to implement recommendations
4. Technical staff capacity
5. Focus on safe, affordable, nutritious foods
6. Potential to have more than \$500,000 USD in annual sales but do not exceed \$5 million
7. Supply chains that include local farmers
8. Demonstrated desire to engage with and improve their local community

Overall, high-potential clients are mid-sized food companies who understand their own business’s needs and strategy, and may not otherwise be able to solve certain challenges on their own. Our volunteer opportunities fit into a client’s high-priority business needs so that the client is highly motivated to collaborate with volunteers. Since implementing this strategy, we have found that these clients achieve greater success. They produce more nutritious foods and source from more local farmers. High-potential clients are more likely to implement volunteer recommendations and create more satisfying volunteer experiences because their technical staff are able to more productively engage with volunteers, and they have access to resources needed to act on recommendations.

CONCLUSION

Naturally, there are challenges that we cannot plan for. The coronavirus pandemic is an example of an exogenous shock that clients could not have foreseen or avoided. We've seen many clients increase their engagement with PFS as they look to adapt and seek advice from the experts in our volunteer pool. We've also seen some clients become very focused on navigating the new business landscape they find themselves in, and some have had limited bandwidth to engage. That might be due to things other than a lack of time or focus, but because they've had to lay off staff or cease production during lockdown. Our core value of flexibility and emphasis on communication have helped us adjust volunteer expectations and to focus on finding new solutions to the challenges clients are facing.

Overall, we've found that remote, skills-based volunteering has the biggest potential for impact with clients who are highly engaged and can work with PFS to scope out opportunities where volunteers can help them fill in knowledge gaps and complement expertise or know-how that is missing from within their staff. In order to accelerate that impact, PFS has made our own operations as efficient as possible, devoting extra energy to finding the best volunteer fit for projects and clearly defining the parameters and goals of projects. Both clients and volunteers stand to gain in different ways by being able to connect through this unique and valuable opportunity. In order to maximize the impact a team can have, PFS invests significantly in the front-end scoping, expectation setting for volunteers and clients, and smooth communication to ensure that the team that ultimately comes together can simply focus on their collaboration.

In summary, here are some key steps in shaping collaborative and successful opportunities for volunteers and clients to work on together remotely:

1. Build your team. In order to build bridges between African entrepreneurs and volunteers from global food industry companies, you need a strong operations team who can clear the way for volunteers and clients to connect and get to work on the opportunity ahead of them.

2. Increase the odds of project success by working with high-potential clients who understand their own company well but would not otherwise be able to effectively solve a problem on their own.

3. Explore client needs thoroughly. Many requests from clients can start out very abstract or high-level, described from a CEO perspective. Program Managers invest time up front to develop close relationships with clients to understand the company and what exactly the issues are that they need help with.

4. Define concise, achievable goals for teams to work on. For PFS, this goal should be able to be addressed with volunteers from just one to two primary areas of expertise, and the timeframe for completion of all the steps should be measured in months, not years.

5. Use simple project management tools like a project charter to break the opportunity down into discrete, feasible jobs assigned to the appropriate stakeholder.

6. Evaluate what type of volunteer expertise is needed and invest the time into finding the right experts.

7. Avoid scope creep throughout the project. There should be elements of the engagement that are clearly out of scope that volunteers know they will not have to address for the sake of executing on the core project objectives.

8. Stay flexible. As clients and volunteers start working on solutions together, the path to the right solution for a client might take a new shape. The team may need to add new volunteers or add additional steps.

9. Communicate. Given the remote model, it's not always obvious how everyone's work is coming along and what the status is. Proactively sharing updates and keeping the lines of communication open by email, messages, or calls to keep the momentum of the project moving forward. Having open communication also helps the team acknowledge if the project is still addressing the goal they originally targeted.

10. Grow. Intellectual philanthropy is a two-way street and everyone involved has something to learn!



Connecting Expertise with Opportunity

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