



# Creating Cross-Sector Talent Development Wins



Since 2004, Common Impact has partnered with Fidelity Investments to develop and execute specialized skills-based volunteering programs that serve its community engagement, talent development, and team building goals.

Fidelity requested a program calibrated for the unique expertise of its Corporate Technology Group (CTG) that would enhance their professional capabilities through support of a nonprofit in the New England region where the company has a high concentration of staff.

Common Impact and Fidelity partnered to identify nonprofit technology projects that aligned with CTG's leadership and professional development goals. Common Impact then conducted targeted outreach to interested nonprofits and reviewed their project scopes to match the CTG volunteers with the one that could most benefit from their existing expertise while also providing upskilling opportunities: Achievement First.



# The Project

Dedicated to providing equal educational opportunity for all, Achievement First is one of the top performing public charter school networks in the U.S. operating in Connecticut, New York City, and Rhode Island. The majority of its students are Black and Latinx children from low-income households who will be the first in their families to graduate from college.



Credit: Achievement First

Achievement First was facing challenges using several disparate and disconnected systems to manage its finance and HR functions, such as payroll and talent management. The organization sought a vendor selection framework for a new enterprise resource planning (ERP) system in order to streamline these functions, improve organizational efficiency, and serve its community more effectively.

Common Impact worked closely with Achievement First to understand its current operations, resources, and capacity. From those conversations, Common Impact scoped a four-month team consulting project that would mobilize the Fidelity CTG skills-based volunteers - all of whom were senior-level executives with vast ERP experience - to assist Achievement First in identifying the right product for its particular needs and prepare the organization for the complex platform migration.

# The Approach



7 volunteers

The Fidelity volunteers each dedicated 4-8 hours per week to the Achievement First project. They began by seeking to understand the high-level architecture of Achievement First's systems and conducting deep dive sessions with key stakeholders from its finance, HR, and technology teams.



4 months

The volunteers found that the Achievement First staff was doing a significant amount of manual data entry, lacked access to standard functions like timesheet and expense tracking, and had difficulty cataloging/processing/systemizing and transferring data internally, all of which resulted in processing delays and put vital data at risk.



\$101K+  
social return  
on investment

To solve for these challenges, the team conducted an analysis of five potential SaaS products Achievement First could use to unify its finance and HR functions under a single system: ADP, Oracle Cloud, Oracle Net Suite, SAP, and Work Day. They evaluated desired functionality, integration & reporting, data security, and end-to-end process flows and distilled their findings into a custom ERP vendor selection framework that enabled Achievement First to easily compare products based on its unique needs.



# The Impact

The Fidelity volunteers took great pride in supporting Achievement First and its mission to bring about educational equity. 83% plan to continue lending their expertise to this and other nonprofits and 100% said the experience made them feel more inclined to recommend Fidelity as a great place to work.

Throughout the project, the volunteers benefited from hands-on upskilling, internal and external networking, and exposure to unfamiliar situations that challenged them to think creatively. 100% considered it a valuable professional development engagement that enabled them to grow in their technical and interpersonal skills. "It is a great opportunity to enrich your skills, build a good network, and give back to the

community," one Fidelity volunteer shared. Best of all, the team's efforts will generate deep and enduring change for Achievement First long beyond their four months of partnership.

"Achievement First is incredibly grateful for [the Fidelity volunteers'] effort and expertise in putting together such a comprehensive set of tailored deliverables that we can implement right away. Change management is a big investment and crucial to get right."

- Sheila Zeidman,  
Achievement First

## Volunteers Reporting Improved Workplace Skills

Problem solving and decision making	100%
Working in a cross-department environment	100%
Workplace tools, applications, and processes	80%
Project management	75%
Clarifying roles and objectives	75%