Measuring Impact: Getting Beyond the Monetary Value of Volunteering
Session Agenda

• Welcome & Introductions
• Measuring Impact - Corporate Surveys:
  – UnitedHealth Group Health & Volunteering Study
  – Deloitte Volunteer IMPACT Research Series
  – Citi Global Employee Engagement Survey
• Q&A
• Small Group Discussion
Measurement is an Important SR Component

Social Responsibility Framework at UnitedHealth Group:

**SR – A STRATEGIC CROSS-FUNCTIONAL BUSINESS DISCIPLINE**

- Business Context Issues
- Key Social Needs
- Core Competencies

**WHAT ISSUES DO WE ADDRESS?**

- Chronic Disease Prevention & Care
- Diverse Health Workforce
- Community Investments (Local Level)

**WHAT ACTIVITIES DOES SR INCLUDE?**

- Giving
- Volunteering
- Business Innovation

**HOW DO WE MEASURE SUCCESS?**

- Social Impact
- Employee Engagement
- Reputation
SURVEY BACKGROUND & METHODOLOGY
• Study released today by UnitedHealth Group & Optum Institute
• More than 3,300 U.S. adults participated
• Conducted by Harris Interactive 2/9-3/18/2013
• Expands on findings established in a 2010 survey by UnitedHealthcare and VolunteerMatch

Read the full summary at:

www.uhg.com/socialresponsibility
Volunteering can help people to feel healthier

Employers benefit by supporting volunteering
Volunteering Linked to Four Dimensions of Health

Volunteers say that they feel better—physically / mentally / emotionally.

Volunteering helps people manage and lower stress levels.

Volunteers feel a deeper connection to communities and to others.

Volunteers are more informed health care consumers and are more engaged and involved in taking care of their health.
## Four Dimensions of Health

<table>
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<tr>
<th>Dimension</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>HEALTH</strong></td>
<td>• 76% say that volunteering has made them feel healthier</td>
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<td></td>
<td>• 94% say that volunteering has improved their mood</td>
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<tr>
<td><strong>STRESS</strong></td>
<td>• 78% say that volunteering has lowered their stress levels</td>
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<td></td>
<td>• 63% report that they felt calm and peaceful most of the time in the last month</td>
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<tr>
<td><strong>PURPOSE</strong></td>
<td>• 96% say that volunteering enriches their purpose in life</td>
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<td></td>
<td>• 95% say they are helping to make their community a better place</td>
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<td><strong>ENGAGED</strong></td>
<td>• Volunteers are more knowledgeable than non-volunteers about their health and chronic conditions</td>
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<td></td>
<td>• They discuss their health with their doctor more frequently than do non-volunteers</td>
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Employers Benefit from Volunteering

TIME MANAGEMENT SKILLS

STRONGER RELATIONSHIPS WITH COLLEAGUES

PEOPLE AND TEAMWORK SKILLS

PROFESSIONAL JOB SKILLS

VOLUNTEERING BUILDS...
Deloitte Corporate Citizenship

Measuring Impact

Points of Light National Conference on Volunteerism & Service

June 2013
Measuring Impact

- Data & measurement inform & validate Deloitte’s Corporate Citizenship strategy
- **Inside Our Organization**: Showcases Business case/ROI for Stakeholders
- ROI Database – populated by CC champions
- Pro Bono ROI Surveys – populated by pro bono teams & nonprofit clients
- Talent Surveys – Intern job acceptance surveys; Employee satisfaction surveys
- Employees – Social media vehicles, e.g., Ambassador program; Facebook “likes”
- **In the Community**: Advances CSR/Positions Deloitte: Thought Leader/Innovator
- Volunteer IMPACT Research Surveys – Findings highlight business case for CSR & employee volunteerism
- 2013 Survey results to be released this summer
What we found so far*

Social Impact
- 95% of nonprofit clients cited projects as extremely or very successful

Client Touch
- 84% of projects resulted in significant relationship or exposure gains materially related to new business efforts

Our People
- 96% found experience a ‘positive contributor’ to job satisfaction
- 81% cited substantial team-development gains with new or existing colleagues
- 79% of participants gained significant job-relevant skills and 72% of projects developed material tools, quals, or substantive training results

*Figures based on FY09/FY10 results, projects, and data collection
Deloitte Volunteer IMPACT Research Series

Key Element of “Think, Invest, Advance”

Eight years of research that focuses on corporate community involvement

Topics have included:
- The link between volunteerism & employee engagement
- Pro bono work as a de facto “currency”
- Volunteerism as a training & development tool

Research offers opportunity to influence the dialogue, help others make the case

Advancing the Field: Corporate Community Involvement

Advancing the field is a key component of Deloitte’s commitment to building the business case for, and progressing the dialogue about, corporate skills-based volunteerism and pro bono. Through compelling research on issues of strategic importance, Deloitte advocates for skilled volunteerism to strengthen the nonprofit sector and for the strategic use of community involvement to achieve business goals.

In addition to Deloitte's ongoing research, several notable articles have been published:

- Leveraging the Link Between Corporate Volunteerism, Employee Engagement and the Bottom Line
  Tune in to the latest episode of Deloitte Insights to learn more about the survey and the connection between volunteerism, employee engagement and the bottom line.

- Deloitte Volunteer IMPACT research series
  For several years, the Deloitte Volunteer IMPACT research series has focused on measuring important aspects of corporate community involvement.

- Deloitte CEO responds to Wall Street Journal
  In a Wall Street Journal Letter to the Editor, Deloitte LLP CEO Barry Salzberg responds to a story titled “What’s Wrong with Charitable Giving—and How to Fix It.”

- Chronicle of Philanthropy podcast
  Evan Hochberg, national director of community involvement at Deloitte addresses the need to improve the effectiveness of volunteerism.
Millennials who frequently volunteer are more likely to be proud, loyal, and satisfied employees as compared to those who rarely or never volunteer.

- Millennials who volunteer are more likely to be satisfied on the job. Is there a connection?

Volunteerism is more than an employee perk; evidence is mounting that it’s a recruiting tool, it impacts image and reputation and now there is a connection to career satisfaction.
The Business Case in Numbers

66% of the Gen Y workforce say they would prefer to work at a company that provides opportunities to apply their skills to benefit nonprofit organizations¹

82% of executives surveyed said good corporate citizenship helps the bottom line²

70% of employees surveyed said they feel better about working at their company as a result of their pro bono volunteering experience³

52% of surveyed executives said corporate citizenship is part of their business strategy.²

91% of Fortune 500 human resources managers said volunteering knowledge and expertise to a nonprofit can be an effective way to cultivate critical business and leadership skills⁴

Sources:
2. Center for Corporate Citizenship at Boston College, 2004
Making the survey results actionable

Three things your company can do

**Take an inventory**
Review your existing volunteer program and ask yourself whether your corporate culture places a value on volunteerism.

**Tie efforts to other initiatives**
Look for opportunities to align volunteer initiatives with other business priorities, such as recruiting, leadership development and training.

**Make sure policies match philosophy**
Walk the talk. No single way to do this but if the company is going to espouse the value and reap the rewards, it must create the opportunities and build the support mechanisms for its people to participate.
Additional Resources

Pro bono report: “Community – It’s our business: Insights and reflections on doing pro bono work”

Volunteer IMPACT Research: 2004-2011 executive summaries and survey results
Citi Volunteers

Employee Volunteer Survey
Citi Volunteers: Overview

Purpose
- Support global volunteer initiatives and provide the resources needed to empower Citi employees to make a positive difference in their communities
- Champion the Citi Foundation’s “more than philanthropy” approach – people, product, philanthropy

Goals
- Increase volunteer activity
- Make a positive difference; measure impact
- Deepen relationships with community organizations and key stakeholders
- Build employee morale
- Provide unique professional development opportunities
- Build brand awareness and enhance company’s good corporate citizen image
How We Operate

Multi-layered, embedded structure that has enabled volunteerism to become part of Citi’s corporate culture

- Volunteer Leaders/Senior Champions
  - 700+ around the world

- Citi Community Development/Public Affairs

- Centralized Resource Unit

- 150 CDO/PAO
  - 90+ Countries

- Volunteer Councils; Green Teams; Diversity Networks

- Employee-led Networks, Volunteer Councils

- Citi Volunteers
Why a Global Employee Volunteer Survey?

- **To Confirm**
  - Employee motivations
  - Employee interests
  - Employee satisfaction
  - Professional development impact
  - Management support
  - Correlations between length of service and depth of engagement
  - Awareness of volunteer policies and technology tools
  - Cultural differences across Citi regions

- **To Inform**
  - Program development, e.g. skill-based programming
  - Communications
  - Direction for Citi’s Global Community Day
How Did We Do It

- **Timing:** October 2012: survey open for 2 weeks

- **Target audience:** 250,000 employees across 90+ countries

- **Tool:** In-house survey technology; invitation via email sent from Global HR Head and CEO/President of Citi Foundation; English only and not anonymous

- **Content:** 18 questions with only 1 of them being open ended

**Summary of 2012 Survey participants**

10,222 employees participated from across 93 countries
Results: Motivation, Interests and Development Opportunities

Top three reasons why employees volunteer
1. Opportunity to make a difference in the community
2. Achieving a better work/life balance
3. Developing greater pride in Citi

Top three factors that would further engagement
1. More time
2. Varied activities that include friends and family
3. More colleague or manager encouragement

Favored Types of Volunteerism – Interest

<table>
<thead>
<tr>
<th>Type</th>
<th>Count (Volunteers)</th>
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<tbody>
<tr>
<td>Hands-on volunteerism</td>
<td>7,382</td>
</tr>
<tr>
<td>Skill-based volunteerism</td>
<td>4,363</td>
</tr>
<tr>
<td>Nonprofit Board</td>
<td>3,009</td>
</tr>
<tr>
<td>Online volunteering</td>
<td>2,106</td>
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Development Opportunities
49% of respondents said that their Citi sponsored volunteer opportunity improved their skills, subject matter knowledge or level of job responsibility.
Results: Regional Differences and Culture

56% of respondents volunteer frequently (monthly) or occasionally (once or twice per quarter); Regionally this translated to:

- 66% NAM
- 55% LATAM
- 43% Mexico
- 41% EMEA
- 39% APAC

Regional Differences

North America has the highest level of respondents that volunteer frequently or occasionally, yet engagement in Global Community Day in this region is amongst the lowest in the world.

Conversely, Asia Pacific rated the lowest in terms of respondents volunteering frequently or occasionally, but the region has the highest level of participation for Global Community Day annually.

Many factors are contributing to this inverse relationship including volunteer culture and private vs. corporate engagement practices.

Culture

91% Agree that volunteer opportunities should be made available through Citi
90% Agree that volunteerism is important on a personal level
73% Agree that their local management team is supportive of volunteerism
Results: Communications and Technology

Preferred Method of Communication

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<tr>
<th>Method</th>
<th>Count</th>
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<tbody>
<tr>
<td>Directed emails</td>
<td>8,401</td>
</tr>
<tr>
<td>Leadership communications</td>
<td>2,268</td>
</tr>
<tr>
<td>Intranet page</td>
<td>2,003</td>
</tr>
<tr>
<td>Volunteer Management System (VMS)</td>
<td>1,648</td>
</tr>
<tr>
<td>Citi’s 2.0 platform</td>
<td>591</td>
</tr>
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**Communications**

76% of respondents were aware of Citi’s Employee Volunteer Day benefit, but only 38% say they have utilized the benefit.

**Technology**

Globally, 70% of respondents are not involved in employee led-programs (i.e. Green Team, Diversity Network, Volunteer Council, Citi Clubs)

61% are aware of Citi’s Volunteer Management System (VMS); 41% use it and of these, 32% utilize the system only for Global Community Day.
## Survey Takeaways

### What we have learned

- Diverse workforce - flexible volunteer programs
- Employees are interested in skills-based but episodic work is preferred – utilize Global Community as spring-board to year-long campaign
- Tackle “time” constraints using digital and micro-volunteering programming
- Great potential to further mobilize volunteerism using non-traditional networks
- Communications on volunteerism needs to be timely, relevant, clear and personal; further focus on impact of activities

### Things to consider

- **Scope** – start at the end
- **Data Validity** – methodology and participant anonymity
- **Communication** – pre, during and post
- **Technology** – accessibility
- **Languages** – match your footprint
- **Timing** – fatigue
- **Cost** – third-party support
Small Group Discussion

In small groups, participants are invited to consider your own experiences with measuring impact:

• How can you apply the survey information presented today within your own organization?

• What are your own best practice experiences/results around measuring impact, beyond the dollar value of volunteering?

• Identify existing barriers to measuring impact – are there ways to overcome them?

• What examples or approaches for measuring impact have been particularly effective for you?
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