

Measuring Impact

Global Giving Partner Summit – May 21, 2019



Community**Impact**
Consultants

Clients Include:

adidas
Altria Client Services, Inc.
Comcast
ConAgra Foods Foundation
The ELMA Philanthropies
Gulf Power
JP Morgan Chase
Macy's
MasterCard Worldwide
Nestlé Waters North America
The Prudential Foundation
Starwood Foundation
SEFCU



24 years in the philanthropic sector

13 years - Corporate Program Manager – Fortune 10 Company

11 years as a Strategy & Communications Results Consultant

What level of importance is placed on results at your organization?

1. We talk about results but there's not much action.
2. We highly value results and ask all grantees to tell us what results they will achieve.
3. We ask grantees to tell us their results and to a great extent we use their proposed results when we make grant decisions.
4. We have linked results to our foundation strategy.
5. We leverage results achieved through our grant making to inform our strategy.

The evolution and growth in the sector....



Evolution: Checkbook Philanthropy to Results-Focused Investing

Original Philanthropy



Focuses on a variety of causes, based on general interest and is generally satisfied with the noble act of giving back itself



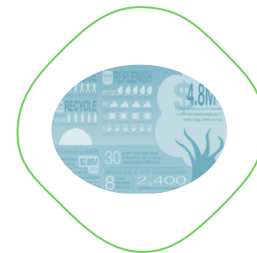
Strategic Philanthropy



Starts to focus and align areas of support with their mission and vision – but then makes decisions based on mission match, anecdotal stories and/or outputs



Results Focused Investing



Focuses on impact & achievement and what will be different for the participants, community or issue they are investing in

Storytelling: Effort vs. Achievement

Strategic Giving

We contributed more than 2,500 grants totaling \$45M annually and 10,000 volunteer hours in 3 key focus areas:

- Hunger
- Domestic Violence
- Homelessness



Results-Focused Investing

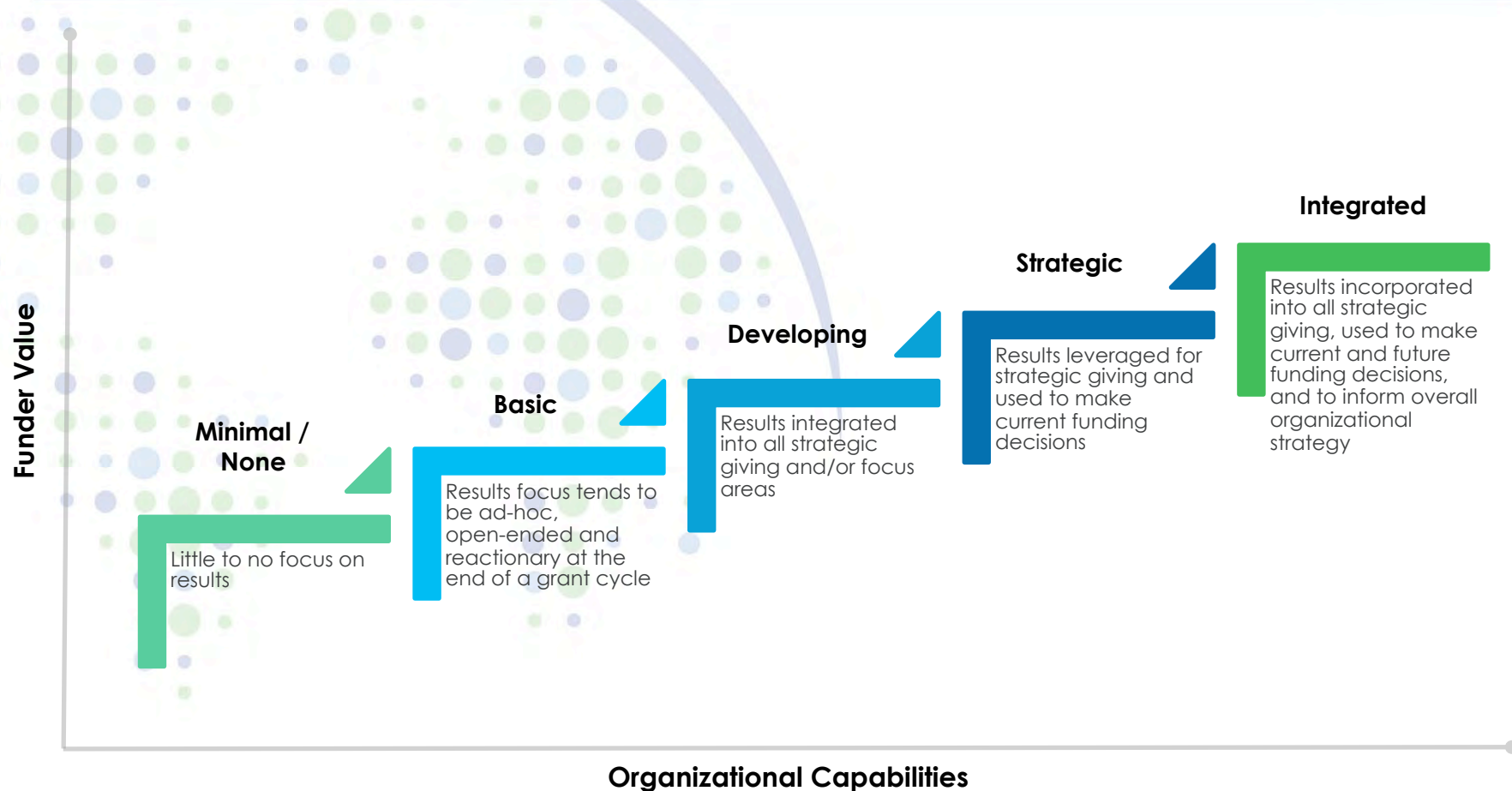
Through our community engagement we have granted a total of \$45M and 10,000 volunteer hours in order to:

- Ensure 100,000 households became food secure and are able to redirect funds to cover other basic needs
- Empower 7,500 women to move from crisis to social and economic stability
- Enable 25,000 local residents to access secure, safe, affordable, long-term housing

How would you describe your organizations role in relation to your grant partners?

1. We are a funder of organizations and programs.
2. We are a funder of programs and some of our grants have clear results.
3. We are a funder of programs and all of our grantees have clear results, which are tied to their funding.
4. We see ourselves as investors in results. Every grant is clear on their results.
5. We are investors in results and we approach and manage our work via grant portfolios, with a strong focus on partnering with grantees to achieve the strongest results possible.

Results Capacity Model – Funder Capacity Levels



What role do results play in your organization's grant funding decision making?

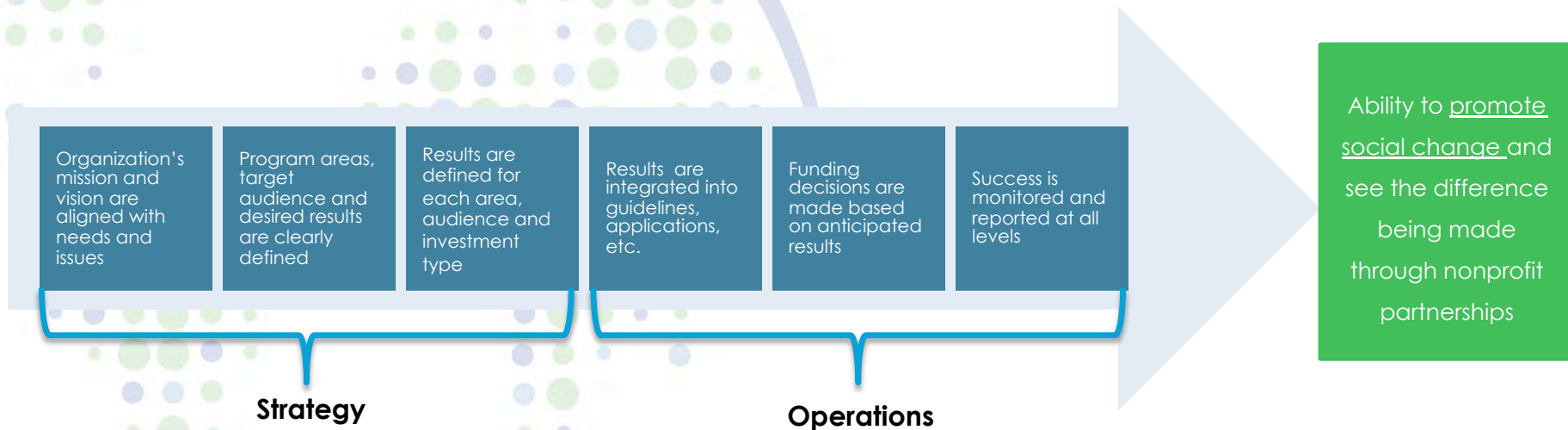
1. We prefer grants with results over those that don't have them.
2. We select grants with results over those that don't have them.
3. We select grants based on potential results.
4. Results inform all grant review, selection and performance.
5. Results inform all grant review, selection, performance and future funding.

Setting Strategy

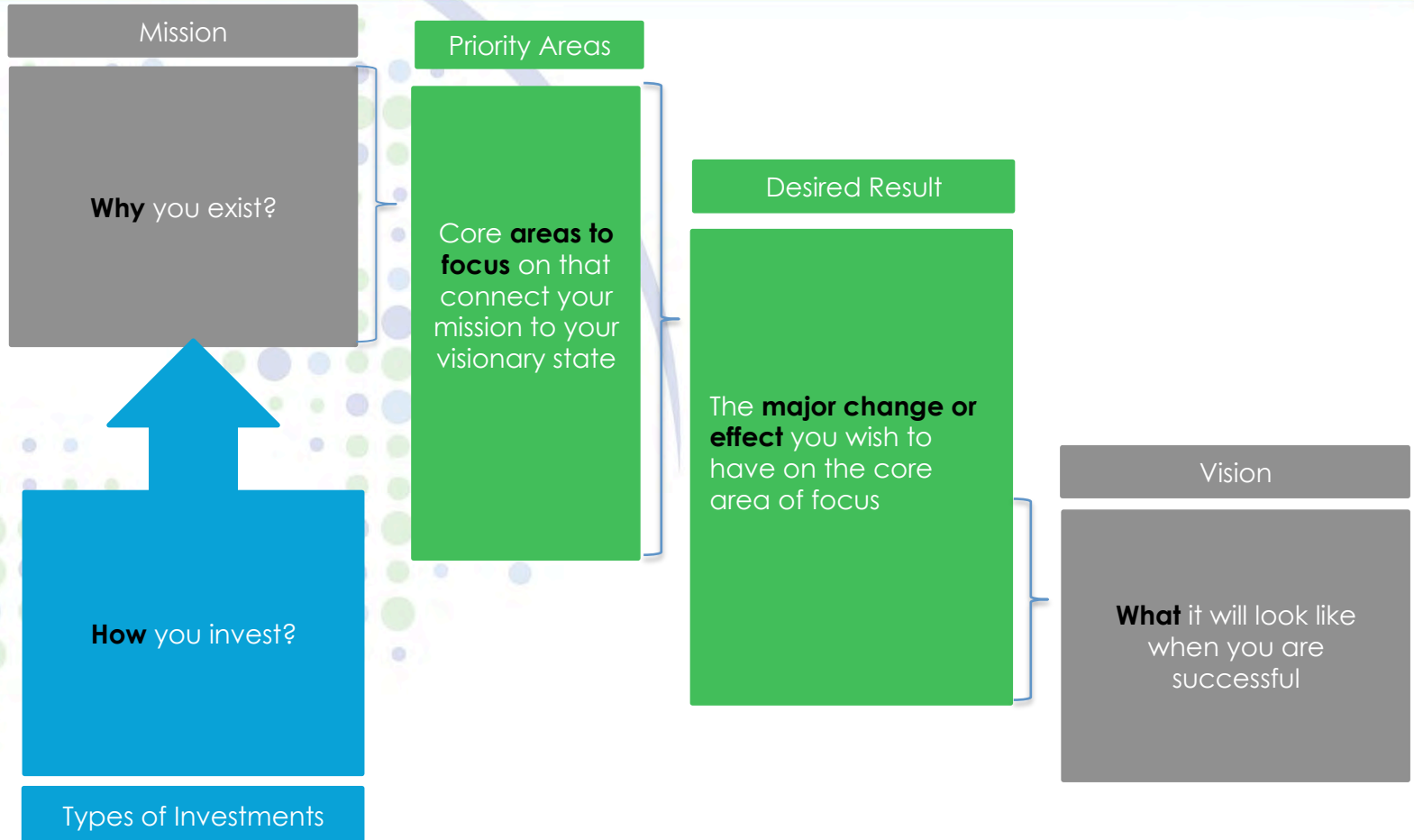
How does your organization measure success?

1. Grant making success is based only on whether grantees are meeting needs.
2. We measure success by utilizing an outside evaluator to confirm results were achieved.
3. We measure success by both grantee results and learning (making needed changes to achieve stronger results).
4. Grantee results and learnings are transferred among grantees – from high performers to low performers.
5. Grantee results and learnings are integrated into our work and used to continuously improve practices and adjust our giving strategy.

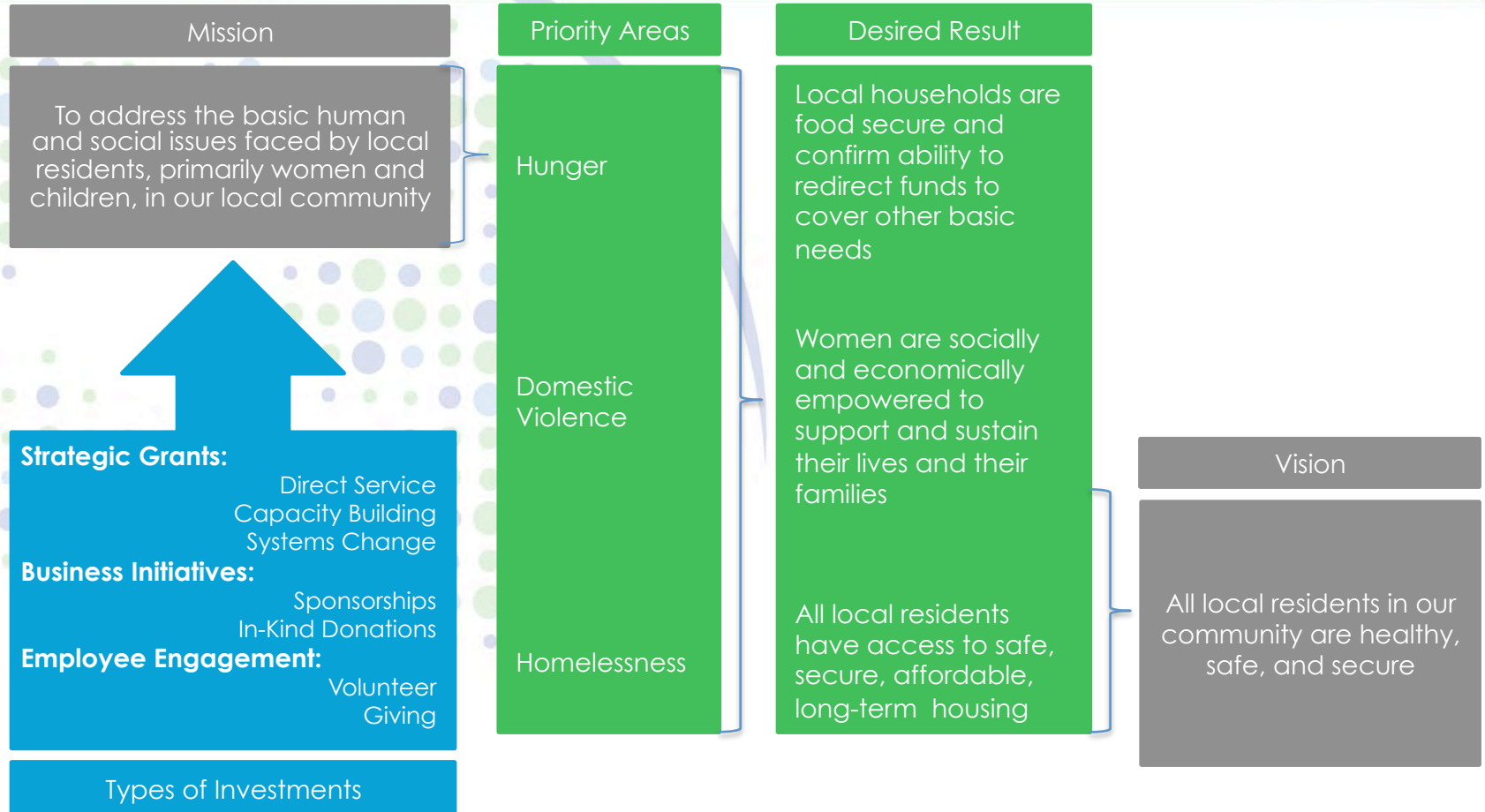
Getting to Impact: Roadmap to Results

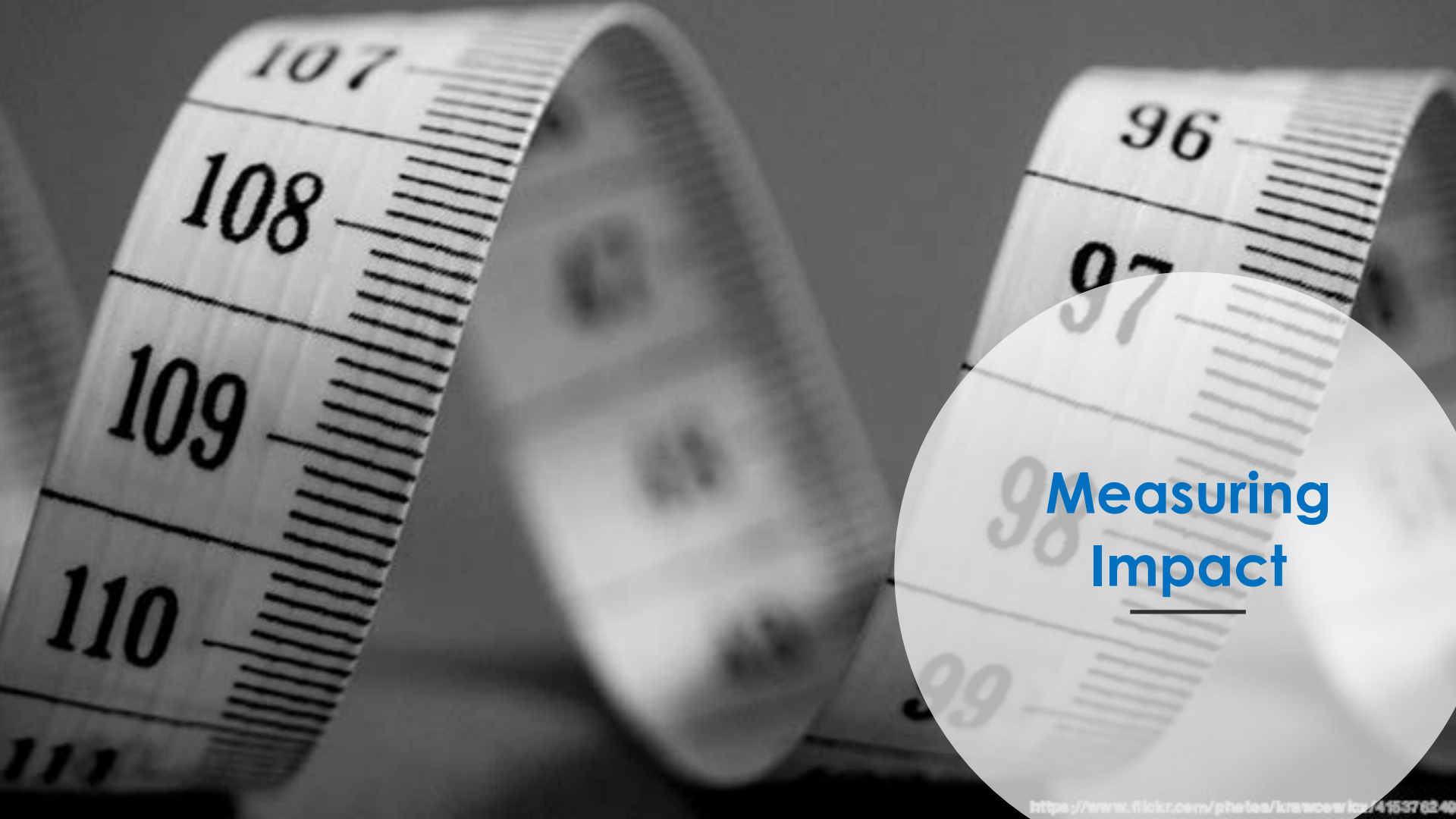


Setting Strategy



Social Impact Strategy



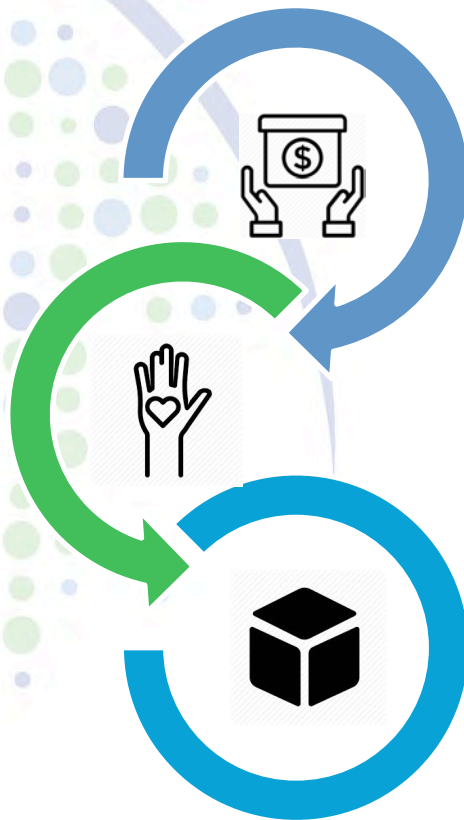


Measuring Impact

Employee Engagement

**Grantmaking
(financial contributions)**

In-Kind Donations



Measurement Framework: Key Terms

Output

A **summary of a program's activities**, often expressed in terms of units

Measures / Indicators

A **continuum of change** that demonstrates progress towards desired results and impact

Results

A **desired change in status, condition or behavior** in response to a particular set of programs or activities

Impact

A **powerful or major influence or effect in individual participants, communities or sector** through the concentration and focus of multiple results

Measurement Framework: Key Terms

Example of an Output:

10,000 individuals in a community receive job skills training

Example of a Result:

70% or 7,000 obtain an entry level job or internship within 2 months of training completion

Example of an Impact:

Ten years later, unemployment rates in the community have decreased by 15%

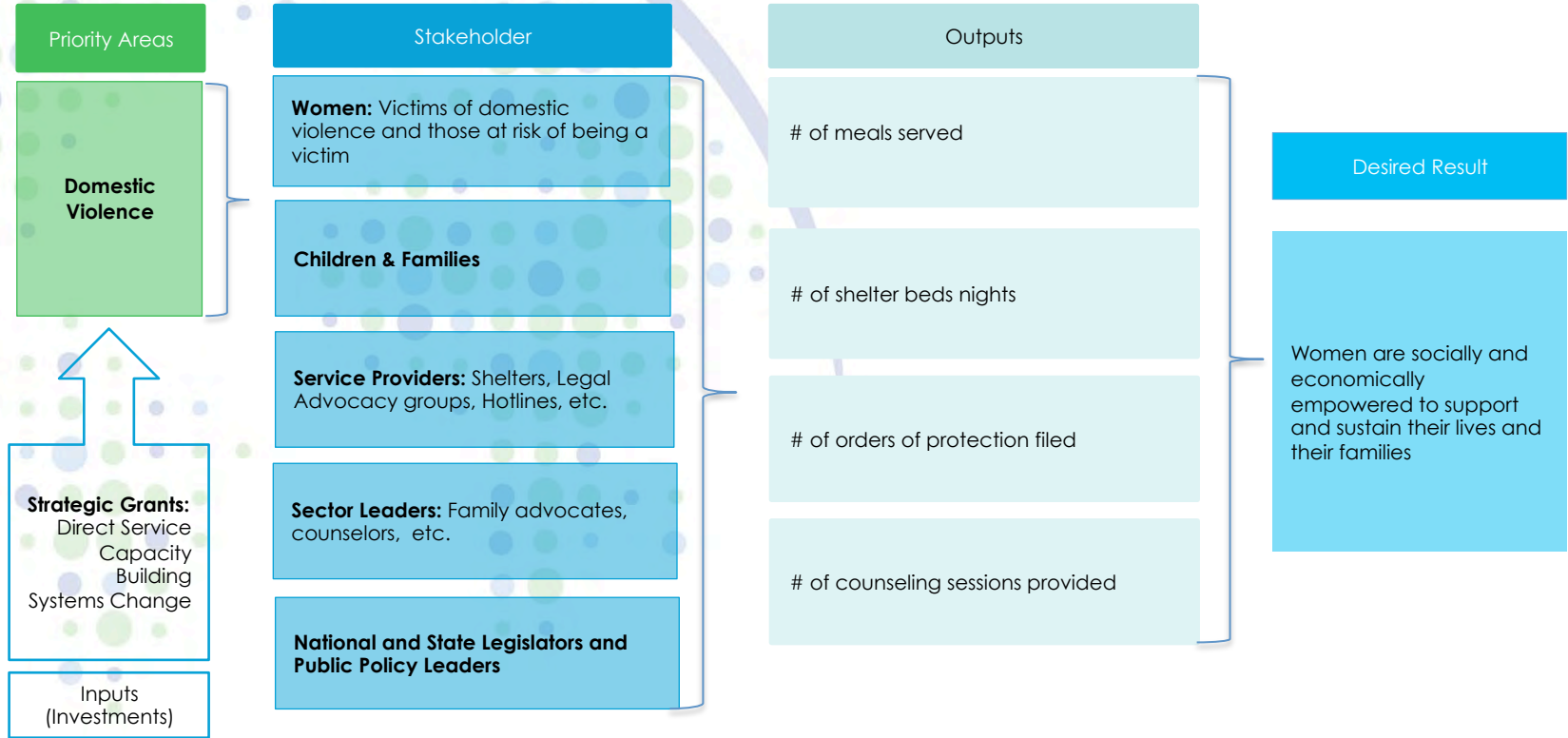
What story do you want to tell?



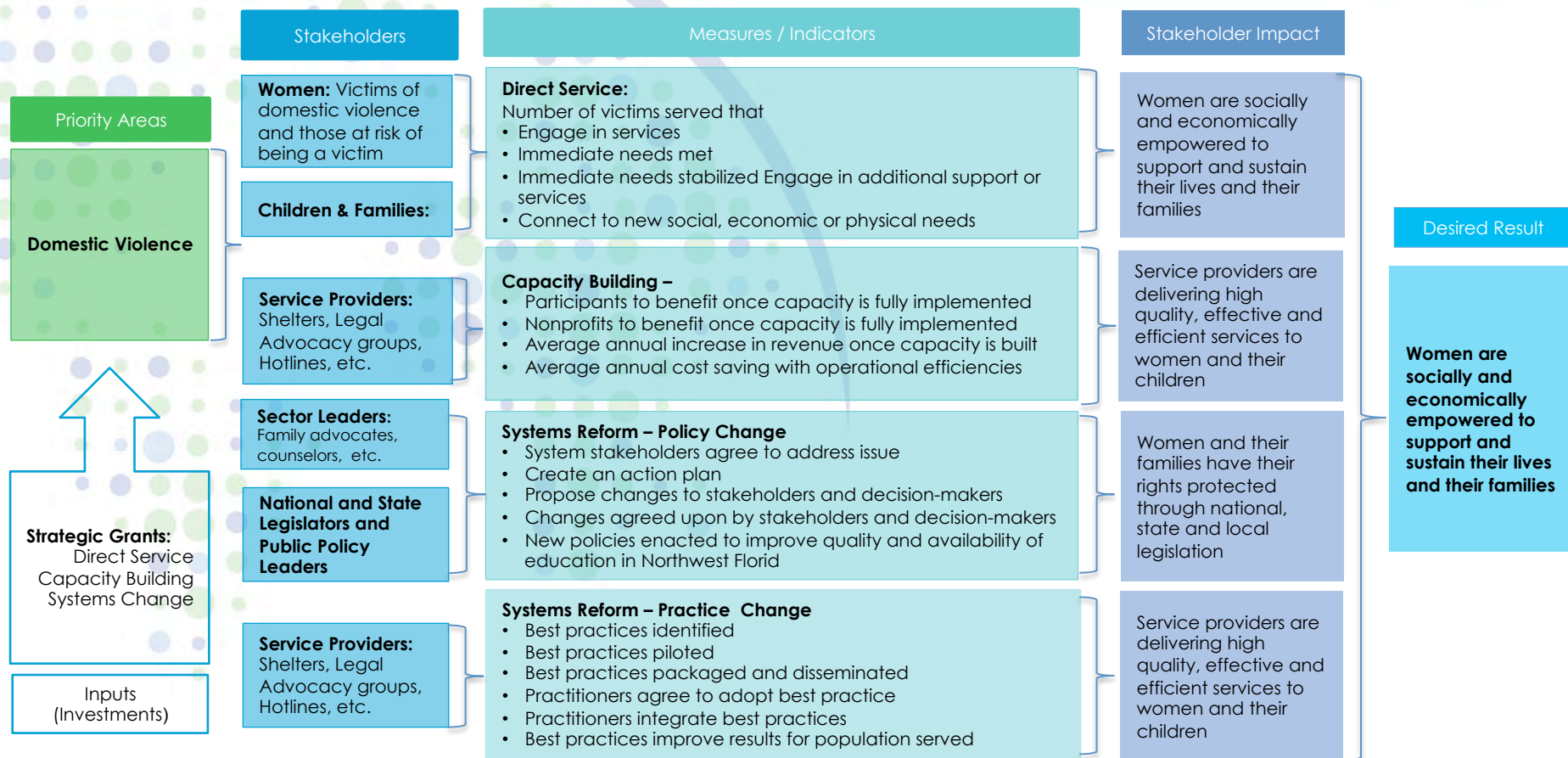
We made a \$25,000 grant to a local domestic violence shelter.

Our \$25,000 investment helped 133 women move from crisis to social and economic stability.

Social Impact Strategy – Focus Area Results



Social Impact Strategy – Focus Area Results



Types of Financial Support: Grantmaking



Programmatic (Direct Service)

What will be different for the program participants?

Projects include existing programs that work directly with individual participants to achieve a specific result.



Capacity Building

How will the NPO be different and what will this enable them to do better?

Projects include efforts that increase or improve the existing capacity of the organization to achieve results.



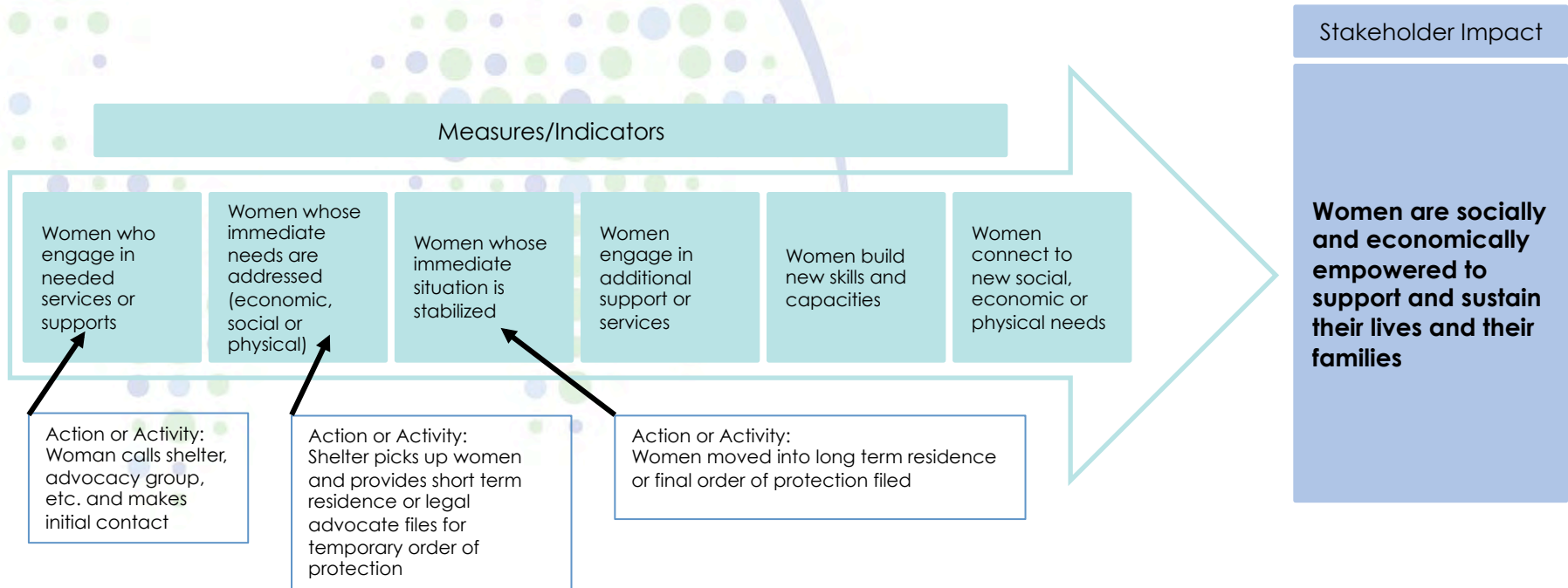
Systematic Reform

How will the NPO's work inform change on a macro-level, including influencing policy or changing practitioner practices?

Projects include applied research and public policy efforts that lead to positive change in our priority areas and communities.

Programmatic Results

- Directly tie to strategy and desired impact for those served
- Focus on participant achievement recognizing change happens along a continuum
- Clearly describe what is different for participants once they have received program services

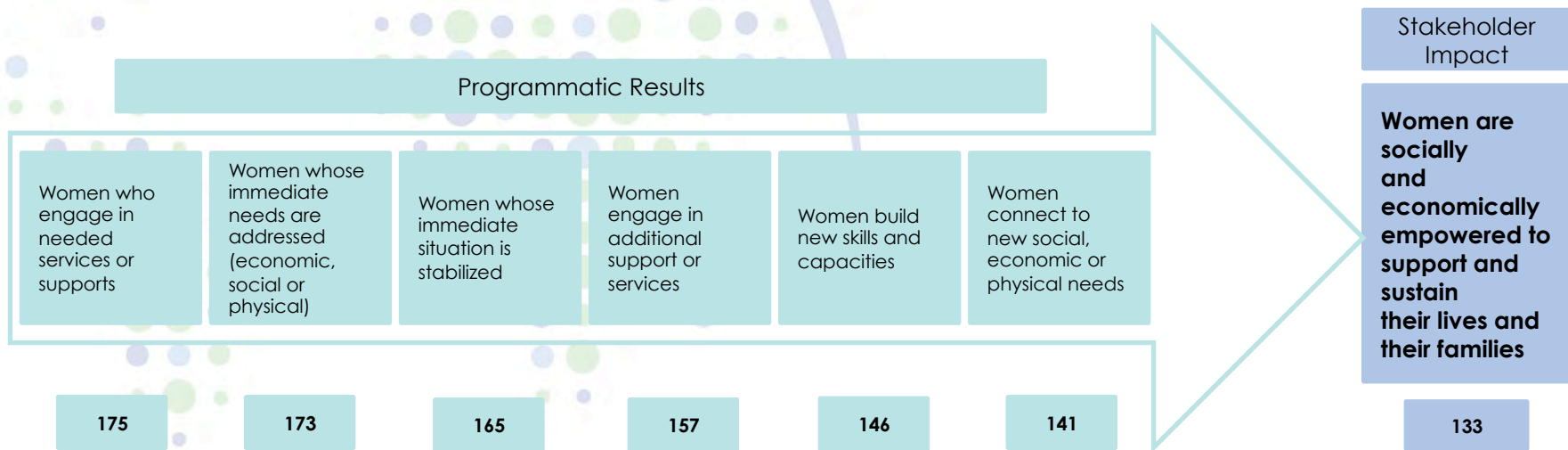


When does your organization ask for results?

1. We sometimes get results information after the grant has ended.
2. We get results from all grantees in the final report.
3. Some of our grantees clearly project their results prior to the grant and then clearly report on them at the end.
4. Every grantee clearly projects their anticipated results and reports actual results at the end of that grant period.
5. Grantees report against results they can influence even when outside of the grant period.

Programmatic Results

- Directly tie to strategy and desired impact for those served
- Focus on participant achievement recognizing change happens along a continuum
- Clearly describe what is different for participants once they have received program services



- **Reduced costs:** Improvements in efficiency, whether in the area of internal operations (e.g., reduced overhead) or program services (e.g., time saved and re-allocated), that will make the organization more sustainable.
- **Increased revenue:** Through diversified sources of income generation or other steps, the organization builds income from new capacity. Think of revenue gains also in terms of volunteers and donated resources for which you would otherwise pay.
- **Increase number served:** New capacity may enable the organization to serve a larger part of the community in need.
- **Increased results for those served:** An improvement may prompt better results in two distinct areas: more people achieve the result you intended and/or additional results are achieved by existing people.
- **Decreased time to get to results:** Reducing the time it takes to enable participants to achieve results is a benefit to those you serve and may even enable you to increase the number of people you reach or reduce costs to the organization.

What will be different for the NPO and those served once capacity implemented?

Capacity Building Results

Example: ***DPT Tickets System and App Project*** - As part of implementing our strategic plan which places an emphasis on growing and diversifying our productions and audiences, we **need to be more interactive and communicate with a new generation of theatre-goers**. In today's fast paced, instant access society we need a way to interact with our potential audience members that is 'normal' to them and provides them with instant, detailed access to specific performance information as well as personal seat location. Using either the **new online system or mobile app**, they will know what performances are scheduled, select date/time and specific seat locations, as well as be able to provide audience reviews and feedback via the mobile app to engage with their fellow theatre-goers.

Anticipated Results:

By the end of the first quarter of 2016, our new on-line ticketing system and mobile app will be launched and fully operational bringing in an estimated **additional \$150,000 or 20.6% in revenue for 2016**.

Policy Change

Stakeholders, including practitioners, experts and policy makers :

- Confirm the value of potential solution
- Agree on best practices/standards/changes and an action plan to move them forward
- Agree to proposed changes/resource re-allocation

Practice Change

Practitioners:

- Test/pilot best practices
- Agree to adopt best practices
- Integrate best practices into their work

Goal of both: Improved outcomes for those served

Long-Term:

- We would like to see the inclusion of business literacy training in at least 75% of the schools in rural Colombia by 2016 and expansion to at least 2 other countries by 2018.

Short-Term:

- By the end of the grant period, fifteen schools will pilot and integrate new curriculum elements successfully and teachers will demonstrate competency and comfort using the new curriculum in the classroom.

SYSTEMS
REFORM

Through our funding we have helped enact legislation to protect domestic violence victims in all 50 states.

CAPACITY
BUILDING

We have provided more than 5,000 legal advocacy groups and shelters training on new legislations and infrastructure to help support the victims.

DIRECT
SERVICE

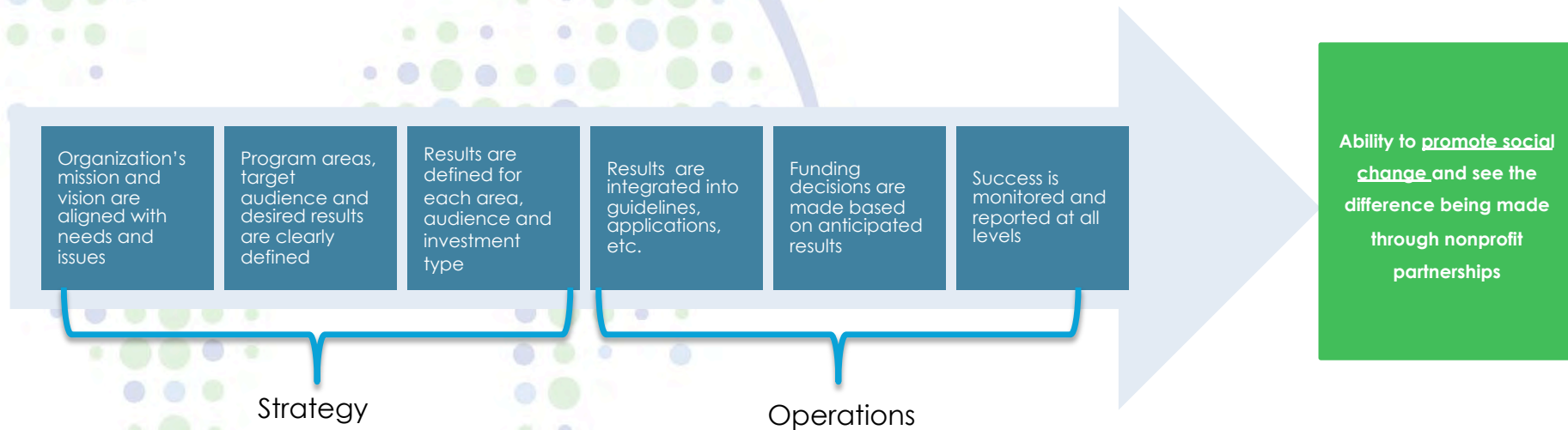
With the new legislation and tools in place, our grant partners have empowered more than 25,000 victims to move from crisis to social and economic stability since enacting the legislation in August 2017.

Overall Impact Story

Does your organization regularly provide support to grantees to track measure and improve results?

1. No support is explicitly provided.
2. We are available to answer questions about requirements for tracking and measuring results.
3. We integrate results tracking into our application and reporting requirements.
4. We provide training and/or technical assistance to our grantees to build their capacity to track and measure results.
5. We provide funding for external support that grantees can use to identify, track and improve results.

Getting to Impact: Roadmap to Results



1. Ask for **consistent metrics** within a program area – key to being able to compare programs/grants, roll-up data and determined your overall impact is asking for “apple to apple” measurements
2. Add some **results focused questions** to your strategic applications:
 - Who they intended to impact (participant or problem overview)
 - What impact they intend to have on them (results statement)
 - How they will get there (project elements)
 - When will they know they’ve succeeded (verification)
3. **Monitor outcome progress throughout the grant term** – don’t wait to the end of the grant term to determine if your grantee is succeeding. Make the relationship a partnership and have check-ins throughout the grant term.

Employee Engagement



**Grantmaking
(financial contributions)**

Employee Engagement – What is it?

Employee engagement is the emotional commitment the **employee** has to the organization and its goals.

This emotional commitment means engaged **employees** actually care about their work and their company.

Types of Support:

Volunteerism:

- **Community Events:** walkathons, festivals, donations (i.e. clothing, books, etc.), marathons, etc.
- **Hands On:** General non skill specific volunteering such as playground clean-up, serving food at a local soup kitchen, etc.
- **General Skill:** Basic business/life skills such as tutoring, general office duties, mentoring, etc.
- **Pro Bono Expertise:** Highly specialized skills such as Legal, Financial, Graphic, etc.
- **Board Service:** Provide both strategic and financial support to grow and sustain the NPO

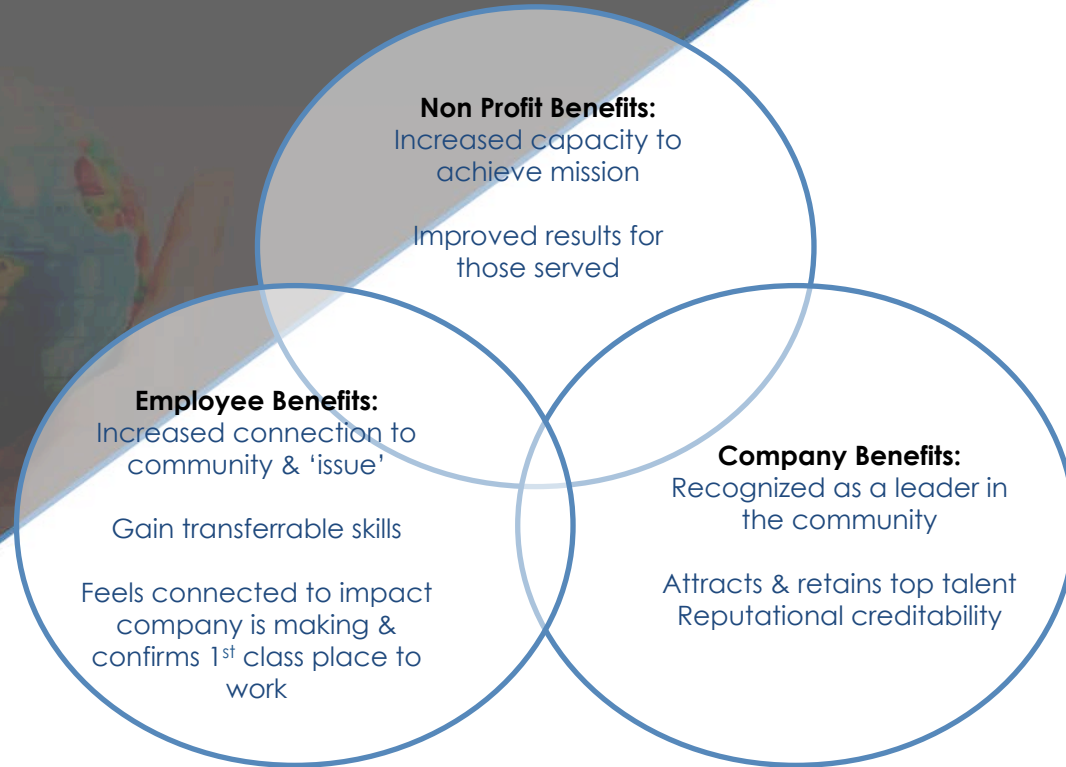
Giving:

- **Matching Gifts:** matching donation of employees charitable gift made to a non-profit organization by an employer
- **Volunteer Recognition Grants (Dollars for Doers):** company grants to nonprofits where employees and retirees volunteer on a regular basis in recognition of volunteer time

Employee Campaigns:

- Giving drives organized by employer that enable the employees to contribute to shared goal, i.e. United Way, Employee Fund, etc.

Employee Engagement - Benefits



Employee Engagement – Volunteerism Results



Types of Volunteerism

Hands On

General Skill

Pro Bono Expertise

Board Service



Employee Results

Increase connection
to the community

Develop and use new
skills in the workplace

Confirm the company
is a first choice place
to work



Business Results

Recognized as a
leader in community

Attracts and retains
top talent

Increased reputational
credibility



NGO Results

Reduce Costs

Increase Revenue

Improve results for those
served

Improve infrastructure
and strategic direction

Results: Hands On Volunteerism

Project Description

25 company employees volunteer at a local food bank to unload food delivery trucks and 25 additional employees to package merchandise for distribution at the pantry

NPO Results

Savings of \$3,500 in staffing costs and \$5,000 increase in revenue from cash grant for employee day

Employee Results

- 42 out of 50 employees confirmed better understanding of local community hunger needs
- All 50 employees state they are proud of the company supporting the local community and giving back
- Team building for 2 departments to work better together

Business Results

Press mention in local paper connecting event to the company

Results: General Skills Based Volunteering

Project Description

Partnering with 6 local middle schools to provide mentoring to 90 students (grades 7-9) on core STEM subjects.
15 mentors per school for at least 24 months.

NPO Results

- 82 out of 90 students increased their grade by at least one letter in one or more of their STEM subjects.
- 86 out of 90 students confirm mentor had a positive impact on them.
- 5 out of 6 participating schools signed up for another 24 month program.

Employee Results

All 15 employees fulfilled their overall commitment and state they are proud of company supporting the local community and giving back, in addition, 7 of them committed to another 24 month engagement.

Business Results

- 4 Press mentions in local paper connecting company to the program
- Company and program recognized by local community chamber as a good corporate citizen

Results: Pro Bono (Skilled) Volunteering

Project Description

Our 4 junior developers worked with a local domestic violence organization to develop a new mobile responsive website for the organization, including developing site analytics and links to other key resources for victims

NPO Results

- Savings of \$7,500 in consultant costs
- Traffic to site increased 30% in first month since launch resulting in 15% increase in cases from previous year and \$1,500 increase in revenue from previous year

Employee Results

- Skill development and team building for junior staff, 2 of which have now signed on to volunteer regularly at the organization

Business Results

- NPO recognized company and volunteer efforts at it's annual gala

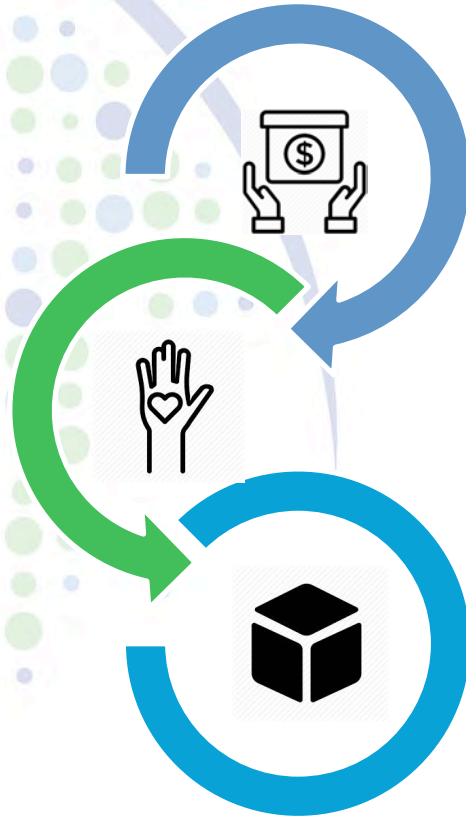
Best Practices: Measuring Employee Engagement

- Only measure results those events you plan and have control over (company organized and planned)
- Agree upfront with NGO partner on goals of project and verification method
- Collect outputs for all

Employee Engagement

**Grantmaking
(financial contributions)**

In-Kind Donations



NPO Results for In-Kind:

Reduce Costs

Increase Revenue

Improve results for those served

Types of Support

Products:

- General Products – supplies, technology, food, etc.

Patient Assistance Programs (PAPs):

- Health care companies providing drugs or services to patients for free

Public Service Announcements (PSAs):

- Media companies providing air time for PSAs at no cost to the NPO

Facilities/Space:

- Use of company facilities and the resources at the facility such as technology, staff, refreshments, etc.

Capturing Results: In-Kind Support



Product

Example:

Food provided to local animal shelter

NPO Results:

Savings of \$75K annually

Participant Results:

All shelter dogs receive nutritious meals to improve their general health



Patient Assistance Programs (PAPs)

Example:

Anti-viral meds provided to those with living with HIV and below the poverty line

NPO Results:

Reduced cost to clinic of \$100K

Participant Results:

100 persons living with HIV see a reduction in viral loads



Public Service Announcements (PSAs)

Example:

Broadcast company provides local domestic violence organization with 100 hours of free PSAs

NPO Results:

Savings of \$250K annually
Able to reach wider audience

Participant Results:

700 women hear ads and reach out to organization



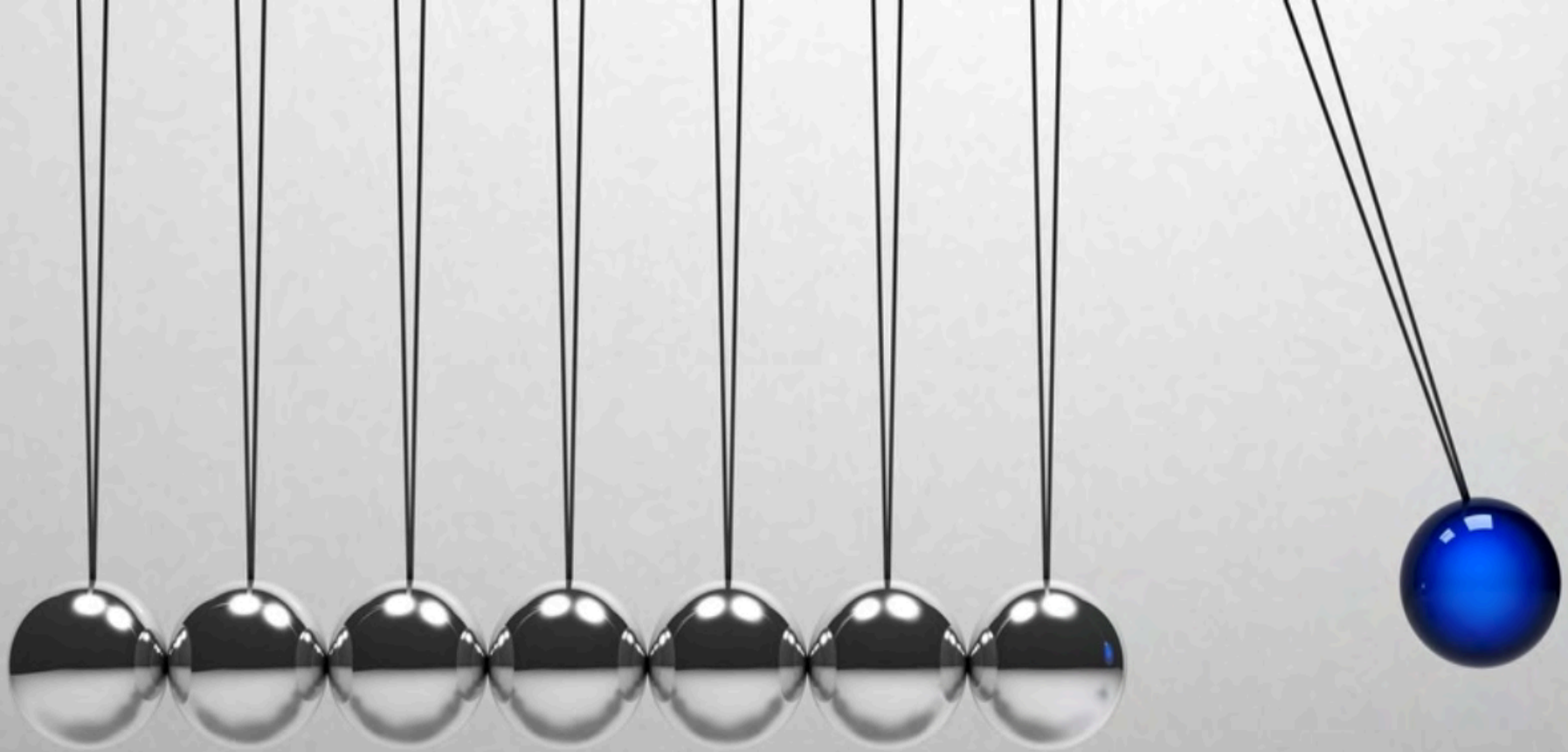
Facilities/Space

Example:

Local Arts organization uses company space 4X per year to hold Board Meetings

NPO Results:

Savings of \$20K annually on rental space



Tell Your Organization's Impact Story

How does your organization communicate success?

1. We rarely share the results of our grant making.
2. We sometimes share individual grant examples of program results.
3. We regularly share our strongest examples of good results.
4. We regularly “roll up” results information and share it with Board, staff and grantees.
5. We regularly “roll up” not only aggregate results data, but we publish “results stories” and we publicize all of it on our website, in annual reports, or other marketing materials.

Through our community engagement we have granted a total of \$45M and 10,000 volunteer hours in order to:



Ensure **100,000 households became food secure** and are able to redirect funds to cover other basic needs



Empowered **7,500 women** to move from crisis to **social & economic stability**



Enable **25,000 local residents** to **access secure, safe, affordable, long-term housing**



Environment \$4.8M

Bring about meaningful and systemic improvements in environmental sustainability through support for research, dialogue, standards and actions around the following areas of focus:

\$'s Granted	Area	Results We Seek	Anticipated #'s to Achieve
\$1.75M	Reduce	Total persons or organizations involved	1,224
\$1.24M	Recycle	Total increases in recycling and reuse	237,042 lbs.
\$0.92M	Replenish	Total bodies of water, land mass, trees or species replenished	221,123 trees planted 307 acres preserved 15 species replenished 5 bodies of water replenished
\$0.15M	Sustainable Design	Total system-wide solutions created or promoted for urbanization	3 new global solutions to address urbanization issues 820 communities to benefit
\$0.05M	Green & Blue Social Enterprise	Total green and blue social enterprises generating sustainable livelihoods	30
\$0.68M	Measure & Set Standards	Total number of organizations or countries signing on to use those standards	8 sets of standards developed 2,400 organizations or countries signing on to

Education \$7.0M

Invest in educational and training endeavors where Alcoa, as a mining, manufacturing and innovation company, can offer our expertise and make a difference, specifically in the areas of:

\$'s Granted	Area	Results We Seek
\$2.9M	STEM	Total youth gaining transferable skills
\$2.3M	Environment	Total persons trained to sustain environment
\$0.02M	Safety	Total young adults pursuing Environment, Health and Safety
\$0.7M	Workforce Development	Total person improving the status in engineering or manufacturing
\$0.6M	General Education	Total students who improve achievement or 21st century skills
\$0.3M	General Job Readiness	Total person that improve employment status

Community Enhancement \$3.8M

Develop localized strategies to address unique and specific community needs and interests in the following areas:

\$'s Granted	Area	Results We Seek
\$1.9M	Critical Social, Health & Urgent Care Services	Total persons using critical services/supports to stabilize lives
\$1.1M	General Youth	Total persons that use environment to strengthen their growth and development
\$0.5M	Community Safety	Total persons trained to develop safety in the community or organization
\$0.25M	Arts & Culture	Total underserved persons



MASTERCARD WORLDWIDE PHILANTHROPY June 2013 Investment Overview

For more than four decades, MasterCard has been a driving force at the heart of commerce, making the global economy safer, more efficient, more inclusive and more transparent for all. Our philanthropy reflects our commitment to the benefits of the global economy are shared more widely and reach youth and adults who are socially disadvantaged. MasterCard Corporate Philanthropy seeks to drive inclusive growth through community outreach. During the 1st half of 2013, 15 grants totaling \$4.47M were awarded to benefit approximately 33,000 underserved youth and adults.

Global Highlights

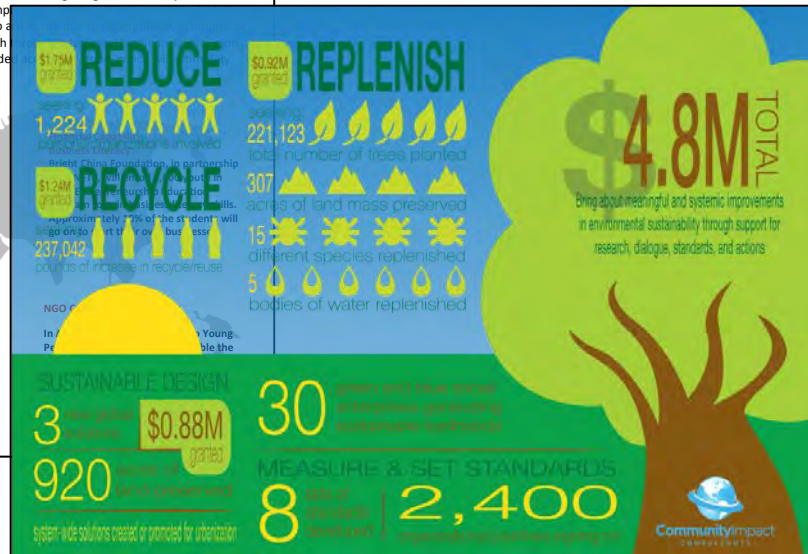
Disaster Relief & Community Outreach

300 MasterCard Purchase employees volunteered in Breezy Point, Queens to help give back after the massive destruction of Hurricane Sandy. Helping Habitat for Humanity to clean up and rebuild the community.

Financial Capability - Entrepreneurship
Partnering with Junior Achievement in Nigeria, we seek to help 300 young women obtain access to capital and start an estimated 50 new businesses creating approximately 150 new jobs.

Access to Products & Technology

In Colombia, we partnered with Grameen Foundation to provide 8,000 farmers in the cacao or coffee value chains with access to products and capital.





PERU ODYSSEY 2017 PROGRAM REPORT



A Fresh Chapter's mission: To heal the emotional scars of cancer through volunteerism, meaningful travel, and programs designed to reframe adversity and redefine what's possible.

In October 2016, 10 Lilly Employees alongside 10 non-Lilly patients, survivors, and volunteers in Lima supporting cancer patients as well as other underserved populations. Fresh Chapter and its ongoing support and resources, participants heal, connect, and find passion for service, while redefining what is possible after cancer.



LILLY EMPLOYEE SPOTLIGHT RIPPLE IMPACT

MICHAEL POLKOWITZ
CANCER SURVIVOR
SENIOR ONCOLOGY KEY
ACCOUNT MANAGER, LILLY



Healing My Cancer Story:

"I was able to - for the first time - write down and share what anger and disappointments me about my cancer diagnosis. I could begin to move forward and heal (and understand and appreciate from others impacted by cancer) the challenges of having cancer and surviving cancer."



Impact of Volunteerism

- Engaged with 100+ cancer patients and caregivers at Casa Hogar in Lima, including preparing and serving daily meals
- Exchanged stories with patients undergoing treatment at the Instituto Nacional De Enfermedades Neoplásicas cancer hospital in Lima



Impact to Lilly

- Formed a connection with an 8-year-old boy (with advanced soft tissue sarcoma) and his mother in Peru, which inspired and motivated Michael to successfully launch Lartruvo™ in New York upon his return.
- Shared experience with 100+ oncology colleagues at Lilly



Impact to Michael's Family

- Encouraged his son Bradley to participate in a volunteer trip to Ecuador during the Spring 2017 thru Free the Children

A Fresh Chapter and Connecting Hearts Abroad provided me with an incredible personal and professional life-changing experience. My time in Peru changed my perspective, positively impacted my family and reinforced my calling to cancer.

- MICHAEL POLKOWITZ

PROGRAM RESULTS

A Fresh Chapter has implemented a performance management methodology to continually assess program results, which is also supported by the standardized PROMIS Facit-Sp validated instrument for measuring spiritual well-being.

58%
increase in
belonging

"It's amazing how complete I feel. There is much more joy, confidence, clarity and purpose. Sometimes you don't know what you're missing until you have time to stop. I'm honored that Lilly would care enough about their employees to invest in them this way. The appreciation is beyond words."

44%
increase in
meaning

"I have felt my outlook on life change, and I have been able to let go of control more easily. I have been able to let go of a lot of negative feelings."

46%
increase in
resilience

"Since returning home, I feel an increase in my confidence. I am more willing to take on challenges and even feel excited about doing hard things."

"The program inspired me to push through obstacles that I face."

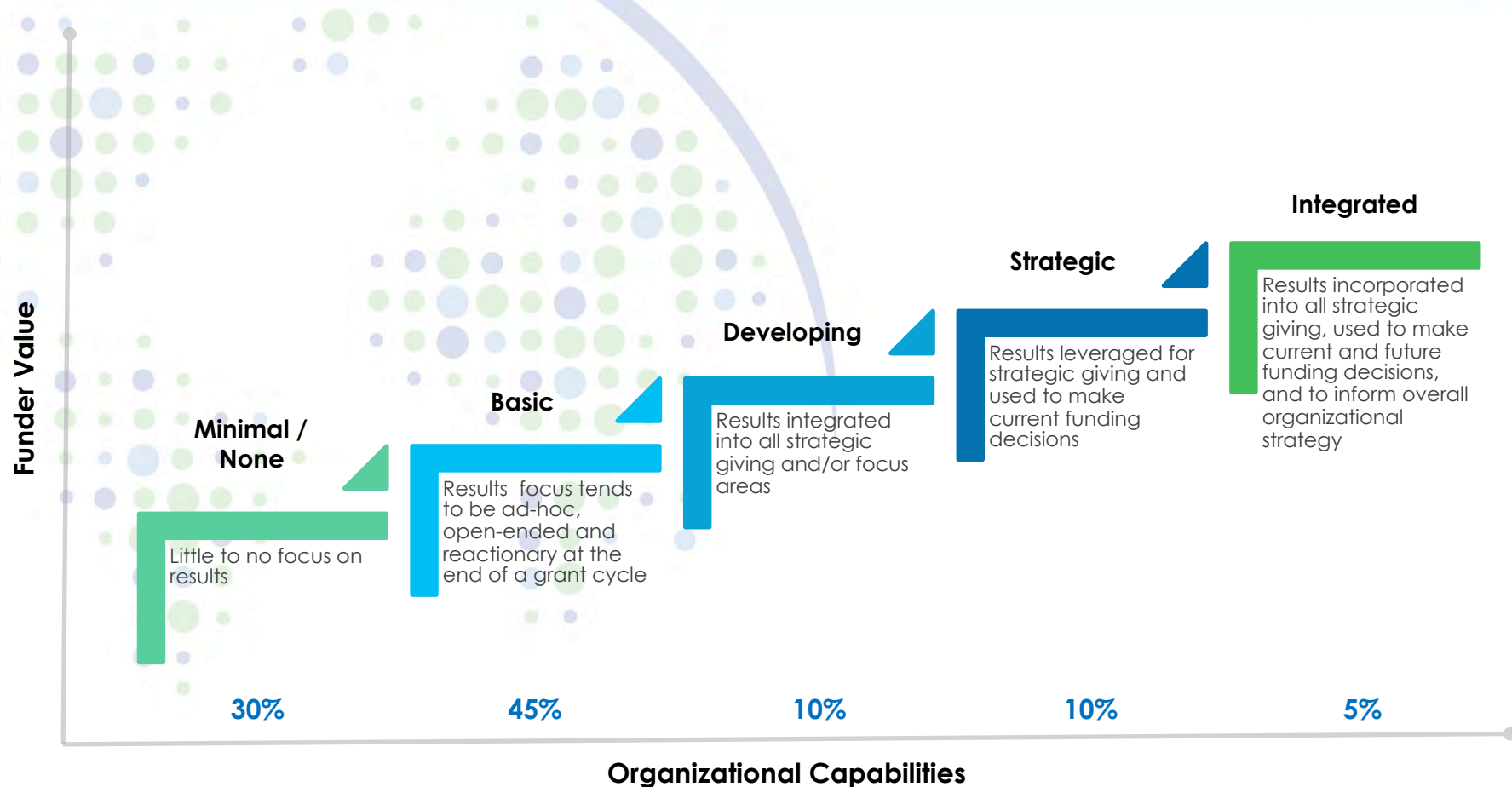
Since you were impacted by cancer, have you felt a **decrease** in the following*:

	Pre-Program	Post-Program
Belonging	4.00	2.64
Meaning	2.60	1.37
Resilience	3.57	2.00

Scale:
4 - Very Much
3 - Quite A Bit
2 - Somewhat
1 - A Little Bit
0 - Not At All

*Average across 16 participants and a series of AFC and Facit-SP questions

Results Capacity Model – Funder Capacity Levels





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Contact Us



CommunityMeasurement.com



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