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Introduction

With the recent economic recession and ever-increasing competition for funding, nonprofit professionals are now, more than ever, being asked to do more with less. We are challenged to help more people, recruit more volunteers, raise more money, and increase our awareness and advocacy efforts. United Way of Central Indiana (UWCI) is meeting this challenge—not by focusing on working harder, but by working smarter. To do this, members of UWCI’s Research Department developed an extensive longitudinal analysis that examined trends, patterns, and relationships in program performance, volunteer engagement, and donor engagement efforts of ReadUP, one of United Way of Central Indiana’s signature education programs. What makes this study unique is its examination of cross-functional efforts within a particular program, providing the opportunity to institute cohesive strategies and efforts across departments.

Using data analytics, researchers sought to understand each of the separate facets of the Give, Advocate, Volunteer spectrum, but also explored correlations across these areas to understand how they relate to one another. By studying these efforts cross-functionally, researchers were able to establish recommendations about the program, while also informing larger efforts to engage donors and volunteers in United Way’s mission in a deeper, more intentional way. This work allows the UWCI team to strengthen cross-functional efforts, maximize resources, and strengthen the legitimacy of United Way as an effective change agent within the community.

Methodology

Using its ReadUP tutoring program as a case study, United Way of Central Indiana performed a comprehensive longitudinal analysis to determine how resources can be used more productively to positively impact efforts along the Give, Advocate, Volunteer spectrum. ReadUP is a volunteer-based tutoring program designed to improve literacy of third, fourth, and fifth grade students across 31 elementary schools in central Indiana. The program is managed and administered entirely by United Way, resulting in two-fold benefits: In addition to contributing to community impact efforts in early grade literacy, the program provides an excellent opportunity for volunteers and donors to engage in United Way’s mission directly. With multiple opportunities for constituents to engage with United Way of Central Indiana, the ReadUP program is uniquely positioned to bridge organizational efforts along the Give, Advocate, Volunteer spectrum.

The analysis focused on three key areas: program performance, donor engagement, and volunteer engagement. Knowing that positive program performance is crucial to advocating for United Way, a program evaluation of ReadUP explored numerous data points to target areas of greatest success. Researchers then analyzed how improved donor and volunteer engagement in the program would be useful in maximizing program outcomes. Finally, the relationships
between donor and volunteer engagement were further investigated to understand the broader impact of engagement on an organizational scale.

The data set included three years of program performance history and seven years of donor and volunteer engagement history. The data were collected and analyzed for key trends, patterns, and relationships. Findings were then triangulated with past studies and anecdotal information from volunteers, donors, and UWCI team members. Once meaningful correlations were established, a series of recommendations were developed in an effort to collectively inform organization-wide strategies related to giving, advocating, and volunteering.

**Data and Results**

During the 2012-13 school year, the ReadUP program reached more students, recruited more volunteers, and engaged more donors than any previous year. Yet the outcomes for students remained frustratingly stagnant. Sixty-seven percent of participating students passed a state-wide high stakes test at the end of the year, consistent with the years before it. While this number was good relative to comparable non-participant students, it wasn’t great. Yet an in-depth exploration of where program successes were yielded far more interesting results:

- Students receiving 50+ tutoring sessions consistently outperformed their non-ReadUP peers and their peers who received fewer tutoring sessions
- Students who were one year behind or less passed 76% of the time, making them far more likely to succeed in the program than those who were further behind and needed more specialized intervention
- Students in third grade consistently outperformed fourth and fifth grade ReadUP participants with an 81% pass rate (compared to 58% with fourth and fifth grade students)
- Equally interesting, students in third grade also outperformed their non-ReadUP third grade peers, regardless of reading level at the beginning of the school year or socioeconomic status, effectively closing the achievement gap

Using this data, researchers established recommendations to target third grade students who were no more than one year behind, with an emphasis on recruiting more tutors at the beginning of the year to maximize number of sessions received. The proportion of third graders in the program increased from 5% in the early years of the program to 81% in the last academic year. Sixty-two percent of students are projected to receive 50 or more sessions, increasing from 13% in the previous year. By implementing this strategy, the percentage of students meeting end of year benchmarks is projected to increase to 82%, up from 67% in previous years.
However, implementing this strategy placed greater pressure on the organization’s volunteer coordinators, whose strategy shifted from recruiting 1,000 volunteers on a rolling basis to focusing on beginning of year recruitment to maximize the number of sessions students receive. This would ensure students received tutoring at the beginning of the year and maintain the same tutors through the end of the school year.

To improve volunteer recruitment and retention strategies, researchers analyzed volunteer engagement patterns to better target volunteer audiences that are most likely to remain engaged over time, decreasing the need to constantly find new volunteers. The data uncovered:

- 55% of ReadUP volunteers had no prior engagement with United Way
- Of those whose first engagement with United Way was as a ReadUP tutor, only 18% volunteered for more than one year
- Only 4% ever engaged in donor activity following their ReadUP experience

Despite efforts to recruit new volunteers to engage in United Way efforts, the data suggest that those without prior involvement in United Way’s mission work don’t necessarily engage in a deeper way beyond their year of long-term volunteerism. However, the inverse seems to be true: efforts to engage donors more deeply with United Way’s mission through long-term volunteering encourage greater long-term engagement overall:
43% of ReadUP volunteers had prior engagement as donors with United Way.

Of those who had prior engagement as donors, 29% volunteered for more than one year, surpassing the retention rate of those volunteers who hadn’t engaged previously.

In addition to having a higher retention rate, those tutors with prior United Way engagement continued to engage as donors for an average of four years.

Furthermore, donors who engage in ReadUP not only volunteer and donate longer, they give more as well:

- Volunteers with previous experience as donors gave average annual gifts of $963, compared to volunteers with no previous engagement whose average annual gifts totaled $236.
- Volunteers with previous engagement as donors also designated a higher proportion of their annual gifts as RUM dollars, giving 76% of their dollars to RUM compared to 50% for those without previous donor engagement.
- Only 12% of these volunteers’ total donated dollars went to organizations other than United Way or United Way agencies, compared to 19% of donated dollars from volunteers without previous engagement.
Taken together, the data demonstrate that long-term volunteers with previous experience engaging with United Way’s mission work tend to contribute more of their time and money. Further, those who have engaged as both donors and volunteers tend to contribute a higher proportion of their donations to RUM and mission-focused designations.

**Implications**

The longitudinal analysis exploring program performance, donor engagement, and volunteer engagement of ReadUP is significant for several reasons.

**First, researchers were able to establish data-informed practices to improve student outcomes by understanding patterns and trends within the sample.** Recommendations included prioritizing third graders over fourth and fifth graders, targeting students who are one year or less behind in reading, and emphasizing the importance of students receiving at least 50 tutoring sessions throughout the school year.

**A second important finding was understanding the correlation between previous engagement and future engagement within the organization, allowing team members to maximize their efforts by focusing on deeply-engaged constituents.** Program managers could maximize their volunteer recruitment by focusing on constituents who have already “bought into” United Way’s mission work. These constituents are more likely to be retained as tutors over time, alleviating the need to continuously recruit new volunteers who would be willing to commit to a year-long opportunity.

Importantly, while researchers found the churn rate of new volunteers surprising, it provided the opportunity to revisit organizational processes related to engaging new volunteers with United Way’s mission. The data suggest that improvements could be made to deepen volunteers’ experiences by providing more intentional efforts to engage them in other United Way activities, and other research from UWCI supports this. In a previous survey, 44% responded that their volunteerism was their form of giving, while 18% said they were not asked to give. In recognizing these trends, UWCI hopes to improve upon processes to deepen engagement of new volunteers.
Finally, the analysis demonstrated that in deepening engagement of constituents, these efforts had a spillover effect that positively impacted other areas of the organization. When donors volunteered, not only were they more likely to volunteer longer, but they donated for a longer period of time. Those who were deeply engaged in the organization gave more per year and tended to donate their dollars to RUM and mission-focused designations. These findings suggest that in expanding the opportunities for constituents to engage, constituents become more dedicated to supporting the mission.

As a whole, these findings imply that intentional, integrated strategies can provide benefits across organizational efforts and maximize current resources, while siloed work reduces efficiency, effectiveness, and resources. The key takeaway from this study: what seem like separate organizational issues are actually intrinsically linked. Program performance drives the organization’s ability to advocate; volunteer recruitment and retention are linked to continued engagement; and resource development is linked to deepening engagement across the Give, Advocate, and Volunteer spectrum.

In using data analytics to establish the relationships between organizational efforts, researchers not only made recommendations to significantly improve programmatic outcomes, but also developed efforts to integrate, prioritize, and strengthen constituent engagement across the organization. As a result, the organization as a whole advanced outcomes and outputs that benefit all departments.
Conclusion

The outcomes presented in this analysis demonstrate that, in fact, more can be done with less. Data analytics provide an opportunity to mobilize resources in more meaningful ways. Establishing strategies that intentionally engage constituents across the Give, Advocate, Volunteer spectrum allowed team members to maximize the cross-functional efforts for the ReadUP tutoring program, resulting in more financial, human, and programmatic resources.

More broadly, this analysis informs organizational practices intended to deepen engagement across United Way’s mission-driven efforts. The evidence suggests that by developing and implementing purposeful strategies focusing on deepening engagement across the areas of giving, advocating, and volunteering, the same amount of effort produces greater results for mission-related activities. Taken together, these efforts strengthen community impact outcomes, leverage resources, and reinforce United Way’s role as an effective change agent in any community.

For more information

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