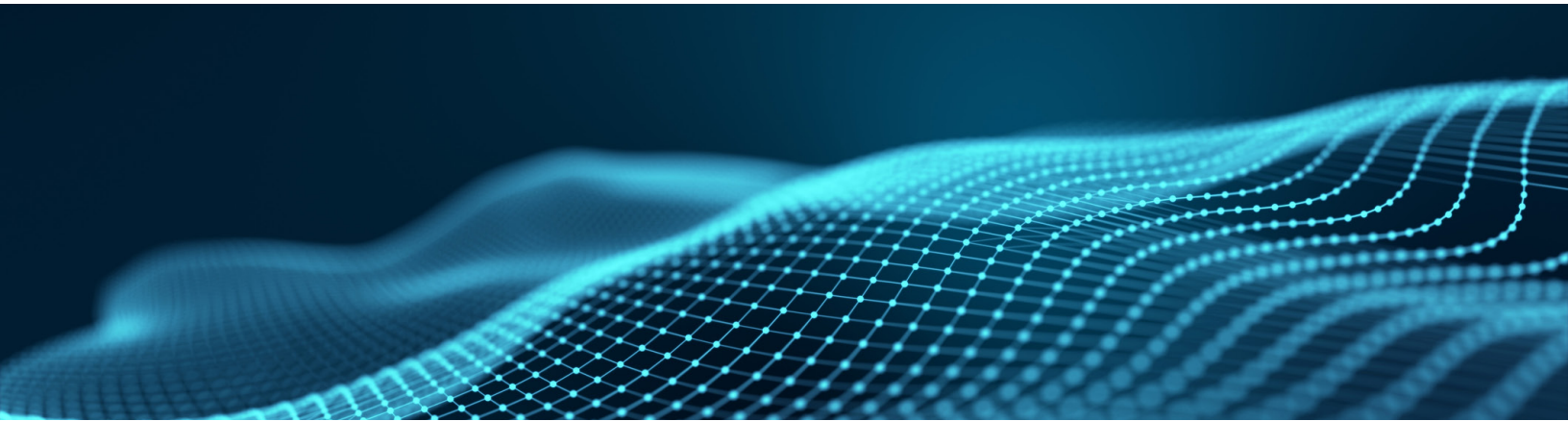


# Callahan Impact Data Survey



## Introduction

In late 2020, Callahan & Associates launched its Impact Network designed to empower credit unions to better articulate their value through a mission-focused lens with the help of new metrics and best practices. A component of this network is to identify, define, and measure impact through new data sources. To move this forward we're using a data impact survey. Will you help?

Our data impact survey is a collection of yes/no and quantitative questions that look into the impact your credit union has on employees, members, the community, and the environment. Think of it as a new way to measure your credit union performance differently.

All participants will receive a scorecard of aggregated data among peers (once enough data has been received) and Peer-to-Peer users will be able to conduct their own benchmarking using the data of all participating credit unions via the software.

This is an evolving data set. If you are already tracking other metrics, to define your credit union's impact, that aren't listed on our survey please let us know.

## Who should complete this survey?

Because this survey covers different areas of impact, you may need input from across the credit union such as the CEO's office, marketing, HR, foundations, and retail.

## Section 1: Impact on Employees

This section measures how your credit union has an impact on the financial wellness and upward mobility of its employees. Key areas of focus include:

- Living Wage
- 401K Benefits
- Career Advancement
- Employee Giving
- Volunteer Support
- DEI Initiatives

## Section 2: Impact on Members

This section measures how your credit union impacts the lives of its members. (We have intentionally left out the products and services reported on the NCUA Credit Union Profile form.) Key areas include:

- Emergency Savings
- Home Ownership
- Financial Management
- Environment
- Citizenship
- Other Unique Member Programs

## Section 3: Impact on Community

This section measures how your credit union impacts the community you serve. For this section, we ask that you define "community" as the geographical footprint where your members live and work. Key areas include:

- Economic Development
- Foundation Work
- Charitable Contributions
- Impact Report

## Section 4: Impact on the Environment

This section measures how your credit union impacts the environment in and around the community you serve. For this section, we ask that you define “community” as the geographical footprint where your members live and work. Key areas include: Key areas include:

- Institutional Footprint
- Products & Services

## How to Participate

To participate, click here to download our Impact Data Template. Either return the template to us at [impact@callahan.com](mailto:impact@callahan.com) or upload it directly to Peer-to-Peer using the “Upload Data” option in the top-right menu.

If you are a Peer-to-Peer user, once your data is uploaded, you’ll unlock access to all loaded Impact data. You’ll be able to view and customize the data in Peer-to-Peer by building a custom display using the impact account codes provided in column B of the template.

[Click here to download the Impact Data Template.](#)

## Frequently Asked Questions

### **Will my data be kept confidential and private?**

This data will not be shared openly across the industry. It will be shared only with other Impact Survey participants who also give their data and have access to Peer-to-Peer. Aggregate data including peer averages may be shared with the industry at large.

### **How long will the survey take to complete?**

This will vary by credit unions based on the number of people involved and ease of access to the data. From

the feedback we’ve received, we estimate it takes between 3 and 4 hours in total (not per person) and most of that time is spent on internal communication and coordination and data collection.

### **If I don’t want to participate, can I still be part of the Impact Network?**

Yes, your involvement in our larger network is not contingent on submitting your data – but, measuring impact is a big part of telling the credit union story and we hope you’ll consider submitting your data in the future.

## **I'm embarrassed by my credit union's data, can you calm my nerves?**

Don't be embarrassed! This is in no way a test. In fact, we've talked to many credit unions who have shared that same sentiment when in reality their data was average like many peers. Credit unions focus their resources and efforts in different places. Knowing your credit union's impact and how other credit unions are making an impact will help you move your institution forward and better tell your credit union's unique story. Still, concerned? Contact us for an impact data consultation where we can discuss one-on-one.

## **What's in it for me?**

All participants will receive a scorecard of aggregated data among peers (once enough data has been received) and Peer-to-Peer users will be able to conduct their own benchmarking using the data of all participating credit unions. This will give you a new set of metrics for communicating your credit union's impact on your members, employees, and the communities you serve.

## **Can I still participate even if some of the data you're asking for is not measured by my credit union?**

Yes! Please submit all of the relevant data you have available. If the account code is not relevant to your credit unions, please type "NA" into the associated field.

# Questions?

You can contact your Callahan Advisor or email us at:

**[impact@callahan.com](mailto:impact@callahan.com)**