

The Bottom Line:

**WE GAIN BY  
GIVING**



Harvard Pilgrim  
HealthCare Foundation





**THEY'RE INSPIRED, ENGAGED,  
INCLUSIVE AND PROUD.  
THEY'RE NOT ONLY ON BOARD,  
THEY'RE LEADING THE CHARGE.**

**SUPPORTED BY HARVARD PILGRIM HEALTH CARE  
AND THE FOUNDATION, OUR COLLEAGUES  
CHOOSE THE WAYS WE HELP AND THE MEANS.  
TOGETHER, WE'RE MAKING A HEALTHY DIFFERENCE IN  
THE COMMUNITIES WHERE WE LIVE AND WORK.  
AND BY GIVING, WE GAIN A LOT.**

**HERE'S HOW.**

**F**rom its beginning in 1969, Harvard Pilgrim Health Care, its directors and staff, have been focused on a larger goal than good health care for individuals. Through the Harvard Pilgrim Health Care Foundation, the health of the whole community has been at the center of the organization's mission for more than 30 years. That's why our colleagues are committed to giving and service, and we're so proud of what they've accomplished across our region.

Social media has made corporate philanthropy—like other forms of giving—more decentralized, yet local and personal. Technology aside, these attributes reflect how Harvard Pilgrim has led this approach for decades, through the way our business gives back to local communities.

This report highlights the unique staff-directed strategy that drives Harvard Pilgrim's employee service and giving programs. Also, it helps connect the dots between staff-led philanthropy and Harvard Pilgrim's business success.

As more attention turns to how businesses lead as good corporate citizens, we offer our experience to inform this discussion. We look forward to your reactions and welcome opportunities to learn about your approaches to this important work.

*Karen Voci*

*Janelle Woods-McNish*



**Karen Voci**  
President,  
Harvard Pilgrim Health Care  
Foundation



**Janelle Woods-McNish**  
Director of Giving and Service,  
Harvard Pilgrim Health Care  
Foundation



Giving and serving is in this organization's DNA. Nowhere is that more evident than in the enthusiasm of my colleagues at every level. They roll up their sleeves and get involved in the community and embody what it means to be a mission-driven, not-for-profit organization. That brings a powerful level of enrichment for employees, as well as our corporate culture and business strategy.

Eric H. Schultz,  
President and CEO,  
Harvard Pilgrim Health Care

## WHEN WE SAY "WE" GAIN OUR COLLEAGUES,

### OUR COLLEAGUES

Employee-led giving and serving brings our staff a unique, inspirational opportunity that supports their personal growth and success. As part of that, their experiences build a strong bond of trust and commitment to one another, and with the company. And they're empowered to decide where to give and serve.

In fact, colleagues at every level of the organization help make decisions about giving and serving, either individually or in groups. What does this mean? It means that a large part of the grant money distributed each year by the Foundation goes where employees direct it. It means that how and where we each spend our company-supported volunteer time is also largely in our own hands. And it means that funds donated through our employee fundraising campaign go where employees decide.

Specifically, every year, every staff member can:

- Direct a \$500 mini-grant to an organization he or she chooses
- Use up to three paid days off to volunteer: once on their own, once with their department or team, and once in a company-wide community service event
- Contribute to the employee fundraising campaign, with recipients identified by a team of their co-workers

This democratic approach to giving and serving produces a sort of organic result. Every individual has the opportunity to contribute to something they find personally meaningful. And sometimes interest in supporting a specific cause spreads throughout a department or even the whole organization when someone champions it.



# A LOT BY GIVING, WE MEAN ALL OF US – OUR COMPANY AND OUR COMMUNITY:

## OUR COMPANY

Harvard Pilgrim employee satisfaction surveys consistently demonstrate a strong feeling of pride about our community focus, including our giving and serving programs. That pride breeds stronger engagement, trust and dedication among our employee community. Through surveys, anecdotal feedback and social media postings, we're also finding that our community focus is making an impact in the marketplace, including our ability to forge and cultivate relationships with brokers, employers and consumers.

In addition, supporting diverse communities reflects on our ability to attract and retain equally diverse talent to our organization. While it may be difficult to measure, we're confident that this focus factors into the significant recognition we've received, which includes:

- Recognition for the quality we deliver to our members every day, as Harvard Pilgrim has been **consistently ranked among the nation's highest-rated private health plans**.\*
- The *Boston Business Journal* named Harvard Pilgrim to its list of 2015 **Best Places to Work in Massachusetts**, ranking us among the top 25 companies in the program's large employer category. This is the 13th year in a row Harvard Pilgrim has been named to the BBJ's annual regional awards program.
- We were named a **Best Place to Work by the Human Rights Campaign**, receiving a 100% rating on the HRC's 2014 Corporate Equality Index. The award is based on the advancement of best practices for lesbian, gay, bisexual and transgender (LGBT) employees.
- Harvard Pilgrim of New England won **Best Health Insurance Provider** in *New Hampshire Business Review's* 2015 Best of Business (BOB) Awards. The eighth annual state-wide readers' survey honors New Hampshire businesses that offer the best customer service, pay attention to detail, and are willing to go above and beyond to ensure an exceptional customer experience.

\*NCQA's *Private Health Insurance Plan Rankings, 2011-15, HMO/POS/PPO*. NCQA's *Health Insurance Plan Rankings 2010-11 - Private*. U.S. News/NCQA *America's Best Health Insurance Plans 2005-2009 (annual)*. *America's Best Health Insurance Plans* is a trademark of U.S. News & World Report. NCQA *The State of Health Care Quality 2004*

Our surveys show that the majority of employers and consumers believe it matters that insurers behave like non-profit companies, including establishing a foundation dedicated to working within the community.

Vin Capozzi,  
Senior Vice President, Sales  
and Marketing,  
Harvard Pilgrim Health Care

# OUR COMMUNITY

Driven by the mission of the Harvard Pilgrim Health Care Foundation and the passion of our employees, Harvard Pilgrim has a long tradition of supporting organizations and causes in the cities, towns and neighborhoods we serve. Community health centers, youth development programs, human service organizations, schools, shelters, prevention programs . . . the list is long and varied.

Statistics tell just part of the story about giving and serving at Harvard Pilgrim Health Care:

97%

97 percent of our Harvard Pilgrim colleagues take part annually in some sort of company-sponsored community giving or serving

1/4

About one quarter given annually by our Foundation—\$550,000—is awarded to hundreds of organizations chosen by staff members

3,200

In a typical year, our co-workers spend more than 3,200 hours working on community service projects supported by Harvard Pilgrim



The human stories behind these numbers reveal much more about the power of participants' choice and the value of employee leadership.

## COMMUNITY SERVICE PROGRAMS: Giving Time and Talent

At Harvard Pilgrim, everyone at every level is invited and encouraged to spend up to three paid days a year participating in community service. Staff members can spend one day serving wherever and however they choose, one day working together on a departmental service project, and one day at a company-wide day of service sponsored by the Harvard Pilgrim Health Care Foundation and community partners.

Organized service days give everyone the opportunity to work and serve together. Wearing their red Harvard Pilgrim t-shirts, our colleagues have painted in inner-city schools, cleaned and fixed up playgrounds, planted flowers and built gardens at schools and communities, or filled backpacks with school supplies and other necessities for children in need.



## MARY EDMONSTON:

### Building an Army to Combat Homelessness

Mary Edmonston, a recently retired nurse case manager at Harvard Pilgrim, wants to end homelessness. And she has inspired lots of her colleagues to join her in that quest.

When she wasn't working, Mary devoted countless hours volunteering for Father Bill's & MainSpring (FBMS), an organization dedicated to ending homelessness in southeastern Massachusetts. She directed her annual Harvard Pilgrim mini-grant to the organization. Because her enthusiasm for FBMS has been so contagious, many of her co-workers are doing the same.

"Mary told her co-workers at Harvard Pilgrim about us and our mission and got others there interested in supporting us," recalls Lucille Cassis, Chief Development Officer at FBMS. "The word spread and they began to hold drives for personal care items we need in our shelters. Then we started getting mini-grants from employees, and more volunteers, and teams who would come and serve a meal. It has been amazing that one person was moved by what she saw here and took that message back to her colleagues, and they were able to join in that effort. It is inspiring and meaningful, and deeply appreciated here."

Father Bill's & MainSpring receives state and federal funding to support its work but must raise about \$2 million each year through private fundraising to meet its budget. Cassis says that contributions such as those from Harvard Pilgrim mini-grants are critically important to the organization's work.

But she adds that Harvard Pilgrim volunteers give the organization so much more than just money and time. "When they volunteer in our programs they come to understand homelessness at a personal level," she says. "They may meet someone who moves them or hear a story that helps them realize that they are not so different from each other. They see that the stereotype of the person pushing the shopping cart is not really the face of homelessness."

In 2013 Mary Edmonston received Harvard Pilgrim's Community Spirit Award, recognizing her as the company's Community Volunteer of the Year in Massachusetts.



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Lucille Cassis, Chief Development Officer at FBMS

## COMMUNITY SPIRIT MINI-GRANTS:

### The Power of Small

*The mini-grant program was a response to the tragedy of September 11, 2001. Staff and leaders decided that the best way to honor colleagues and members who died that day was to create a perpetual memorial: an annual way for every employee to “do good” by directing a \$500 grant to a non-profit organization of their choice.*

*Since the program was established, more than \$4 million in mini-grant money has been distributed to causes near to the hearts of Harvard Pilgrim staff, from food pantries to Boy Scout troops to senior centers.*

*In 2013, after the Marathon bombings in Boston, employees directed more than \$70,000 in mini-grant funding to the One Fund, created to support victims and their families. The Harvard Pilgrim Health Care Foundation and the corporation itself each gave \$15,000, making a combined contribution of \$100,000. We are proud that we were able to make a generous contribution, and also proud that we had a mechanism in place to make it easy for our staff members to give so generously.*

## THE BOSTON HURRICANES:

### Giving With a Personal Touch

The Hurricanes Athletic Club of Boston provides basketball and volleyball programs to kids and young adults with ties to Boston's Chinatown community. Volunteers coach young athletes to develop skills that help them compete at the highest levels locally and nationally, and the Club provides social, educational and professional interaction for its members.



“We want our young people to be healthy physically and socially,” says Hurricanes’ President Jeff Chin. “We attract Asian Americans from all over the Greater Boston area, some from towns where they might not see a lot of other Asian Americans.” The Club’s goals are to foster health and well-being in the children it serves.

“We keep our fees very low compared to other non-profit clubs,” says Chin, “so that we can work with kids who wouldn’t be able to join otherwise.” Defraying the cost of membership and renting gym time in various communities is expensive, he says. “We rely on charitable contributions to help us do what we do.”

The Hurricanes have received several mini-grants thanks to Harvard Pilgrim staff members who support the work of the organization. “I love the way Harvard Pilgrim puts the control about where to give into the hands of its employees,” says Chin. “We do get money from other sources, but we feel a special connection to Harvard Pilgrim because the employees make the choice to support us.”



## CAMP SUNSHINE: Planting Seeds of Support



For children with life-threatening illnesses and their families, or families who have lost a child to illness, Camp Sunshine in Casco, Maine, is a breath of fresh air, in every sense. It has also been the setting of five consecutive annual service days for Harvard Pilgrim staff.

Camp Sunshine is the only program in the nation whose mission is to address the impact of life-threatening illness on the entire family. During their week-long stay—free of charge for all—families can be themselves among staff and other families who truly understand their lives and challenges.

Harvard Pilgrim Client Manager Steve Conley knows the value of this only too well. “My oldest son Patrick was diagnosed in 1995 with a brain tumor. We started going to Camp Sunshine in 1996.” Patrick died in 2008, and the family still goes back to Camp Sunshine periodically. “There is comfort there among the families.”

Conley has worked in Harvard Pilgrim’s Portland office since 2007. He says one of the things that attracted him to Harvard Pilgrim was its community service focus and the freedom employees have to support what matters most to them. And what matters most to Conley is Camp Sunshine.

Through Conley, other Harvard Pilgrim staff members began to learn about Camp Sunshine, and support for the organization spread. Many staff direct their mini-grants to the Camp, and for several years employees chose Camp Sunshine to receive a portion of the funds raised through the annual employee fundraising campaign. In 2011, employees voted to award a special gift of \$10,000 to the Camp as part of a one-time “\$30K for 30 Years” celebration of the Foundation’s 30<sup>th</sup> anniversary, in which \$10,000 was given to one organization in each of the three states served by Harvard Pilgrim.

And then there were the service days each spring for five years, when staff members in red shirts swarmed the camp to clean up the landscape, plant flowers, or—as they did one year—build a Frisbee golf course.

Conley has been on both sides of this work. After his son died, his family attended a bereavement session at the Camp. “I will never forget when our family in crisis turned into that driveway and the first thing we saw were the most beautiful welcoming flowers,” he recalls.

Conley is proud that he and his colleagues have had the chance to make a difference for an organization he cares so much about. “You feel a lot of pride when you go back to work the next day, knowing your employer encouraged you to take that day out of the office to give back.”

# PARTNERING WITH CITY YEAR AND THE BOSTON CELTICS: Better Together

Working with like-minded organizational partners helps us meet needs in our communities even more effectively. For example, we collaborate with City Year New Hampshire to work together on meaningful service projects in the community. “We had a really inspiring day of service at three schools in Manchester, with staff from Harvard Pilgrim and other sponsors working alongside the young people from City Year,” says Pawn Nitichan, Vice President and Executive Director of City Year New Hampshire.

Nitichan says the volunteers were able to make significant improvements in the school and grounds, but she underscores the broader value of the work. “Our societal structure doesn’t always allow us to integrate well as communities,” she says. “We often don’t come into contact with the people who really need our support. Harvard Pilgrim has taken a stand to make connections in a way that is meaningful, intentional and integrated, and in the long run that helps our communities and our society stay healthy.”



Since 2008 Harvard Pilgrim has partnered with City Year Boston and the Boston Celtics to engage together in a range of service initiatives. The cornerstone of this partnership is a remarkable annual service day in a Boston school. The students enjoy an assembly where they learn about the importance of healthy habits and get to exercise with Celtics players, coaches and dancers. Then the 100 or more volunteers pour their skills and energy into painting, repairing, weeding, and other tasks to improve the learning and playing environment for the students.

The partnership is built around the three organizations’ shared goals to improve the lives of Boston’s children, while also capitalizing on the unique expertise and resources each brings to the work. “Harvard Pilgrim brings vision, financial backing and this amazing workforce that wants to engage with the community,” says Mollie Puskar, Senior Manager of Civic Engagement for City Year.

“Our organizations believe that it’s not just about showing up at a school,” says Ted Dalton, Senior Vice President of Corporate Partnerships and Business Development for the Celtics. “It’s about finding ways to make a long-term positive impact on the life of kids. With a strong corporate partner like Harvard Pilgrim we can expand our reach and do more.”

This long-term partnership has deepened over time as the partners have learned from one another and found more ways to collaborate around their shared goals.



## **LOOKING FORWARD:**

### **Building on Success**

Harvard Pilgrim Health Care is mission-driven. By enabling our colleagues to serve and give in ways they choose, we're helping to fulfill our mission to improve health in the communities where our members reside.

As part of that mission, our colleagues continue to be strengthened as individuals, through unique professional growth experiences, as well as opportunities for enrichment and engagement. In turn, our company builds on these strengths to support our growth and development to become a best-in-class health services organization. It adds up to a powerful synergy that makes us better, and a better corporate citizen.

Looking ahead, we'll build on our model of staff-directed giving and volunteering and enhance it through deeper engagement of our colleagues' valuable skills. As a community-minded partner, we take pride in knowing we're on a path worth emulating.

## **ABOUT HARVARD PILGRIM HEALTH CARE AND THE HARVARD PILGRIM HEALTH CARE FOUNDATION**

Harvard Pilgrim Health Care is a not-for-profit health services company, providing a variety of benefit options and funding arrangements to more than one million members in Connecticut, Maine, Massachusetts, New Hampshire and beyond. Harvard Pilgrim's mission is to improve the quality and value of health care for the people and communities we serve.

Established in 1980, the Harvard Pilgrim Health Care Foundation has invested nearly \$133 million to build healthier communities and improve the quality of health care throughout the region we serve. It supports our employee-driven model of corporate responsibility by supplying and distributing funding, and by coordinating service day activities. The Foundation makes it possible and easy for all staff to give or serve if they wish.

**WORKING FOR A COMPANY THAT PUTS SUCH AN EMPHASIS ON GIVING BACK MAKES YOU FEEL GOOD, AND IS GOOD FOR BUSINESS. EVERY TIME I COME TO A FOUNDATION EVENT, I KNOW I WILL HAVE AN AMAZING AND TRANSFORMATIVE TIME.**

David Westervelt,  
Vice President,  
Financial Planning &  
Analysis, Harvard Pilgrim  
Health Care

**Harvard Pilgrim Health Care**

Eric H. Schultz, *President and CEO*

**Harvard Pilgrim Health Care Foundation**

Karen Voci, *President*

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