2020 Technology Review:
Highlighting giving, volunteering & grants technology
With You Today

Deviré Robinson, JD
VP, Philanthropic Advancement

Julie Caldwell
Nat’l Marketing & Partnerships Director
About FFTC

Full-Service Center of Philanthropy

- Expert Fund Management
- Donor-Centric & Innovative Philanthropy
- Impactful Civic Leadership

FFTC inspires philanthropy and empowers individuals to create a better community.
About CCAP

Charlotte Community Affairs Professionals (CCAP)

- Access to tools, trends and best practices
- Insight into local issues and initiatives impacting the region
- Networking and idea-sharing among CSR peers

Monthly discussions to learn about new initiatives and quarterly meetings to share new research and corporate practices.
CCAP Members

Allstate Insurance Company
Ally Financial
Alston & Bird LLP
Atrium Health
AvidXchange
Bank of America
Belk, Inc.
BlueCross BlueShield of NC
Brighthouse Financial
Carolina Panthers
Charlotte Hornets
Charlotte Knights
Collins Aerospace
Delhaize America (Food Lion)
Duke Energy
IBM Corporation
LendingTree
Lowe’s
LPL Financial
Northwood Office
Novant Health
PNC Financial Services
Positec Tool Corporation
Publix Super Markets, Inc.
Rogers Builders
TIAA
Trane Technologies
Truliant Federal Credit Union
Vallen
Wells Fargo
About E4E Relief

Experts in disaster and financial hardship relief.

Nearly 20 years of experience helping compassionate companies support their employees in need by administering charitable grants and managing employee relief programs.
Clients and Longstanding Partnerships

Serves mid-market and Fortune 500 Companies

Supports 5 million+ people worldwide
Our Partners

Doing Good is Good Business
Snapshot Of The Past 5 Years

As of April 2021

190K+
Grant Applications Received

$279M+
Donations Accepted

$152M+
Granted in Relief
With You Today

Chris Jarvis

Executive Director
The RW Institute’s Corporate Volunteering, Giving and Grants Technology Review

The RW Institute (RWI) in partnership with the Bill & Melinda Gates Foundation, with support from Foundation For The Carolinas, and E4E Relief is designed to provide critical insights to program managers and decision-makers investing in volunteering, giving and grants technology. The review is the only one of its kind in the industry, offering a comparison and analysis of technology solutions from around the world with unique insight into technology procurement, implementation and adoption.

The report is intended to help CSR practitioners make decisions that reduce costs associated with procuring technology solutions that support corporate citizenship programs, and to promote market innovation by creating greater transparency and awareness of existing technology solutions.

Download the 2019 edition here.
1. HIGHLIGHTS OF THE 2019 EDITION
   • SCOPE
   • TECHNOLOGY PLATFORMS
   • USE OF THE REVIEW
   • LAYOUT AND CONTENT

2. INITIAL FINDINGS OF 2020 EDITION
   • SCOPE
   • ADDITIONAL FOCUS
   • CSR MANAGER RESPONSES
   • EFFECT OF COVID-19 AND SOCIAL JUSTICE ISSUES
A market scan resulted in the collection of 51 known solution providers, respectively headquartered across 13 countries and 5 continents.
60 Practitioners across 56 companies in 7 countries.

Completed a survey about their experience with volunteering, giving and grants technologies.

183 End-users across 50 companies in 13 countries.

Completed a survey about their experience with volunteering, giving and grants platforms at their companies.
40 SOLUTION PROVIDERS AGREED TO PARTICIPATE IN OUR RESEARCH

- 23 Solution providers completed a basic product survey
- 17 Solution providers completed a deep dive product survey and provided a product demonstration

7 solution provider Executives/CEOs spoke with us about the vision for their platforms, the technology market, and the future of corporate citizenship
The report is eye-opening. So much important information about our field is covered in the publication.

Whether you have been with your current CSR technology vendor for 15 years, switched vendors a few times, had your vendor merge/bought out by another vendor, or you are currently in the process of changing vendors or thinking about changing – The RWI study of technology vendors is a MUST READ.

— Sr. Manager, Community Affairs, Insurance Industry
RESULTS

Downloads

• 747 downloads in the first 5 weeks (150 per week)
• Estimated 850 distributions (shared via email, print form)
• Over 1600 downloads from rw.institute site since publication

Audience

• 1073 Technology providers
• 398 CSR Managers
• 652 unique companies globally
RESULTS

1,600+ DOWNLOADS GLOBALLY

AUDIENCE
- Practitioners: 50%
- Nonprofits: 30%
- Technology Professionals: 10%
- Other: 10%

GEOGRAPHY
- North America: 40%
- South America: 20%
- Europe: 10%
- Africa: 10%
- Asia: 10%
- Australia: 10%
- Other: 20%
84% of CSR managers have recommended the report to colleagues

“We are in the process of switching to a new volunteering and giving platform. I started with RWI’s Technology Review. If [a platform] wasn’t in the review, I didn’t even consider it. The Review has all the information I need to shortlist my options.”

– Sr. Manager, Community Investment, Energy Industry
This report is available for free download on the RW Institute website: http://www.rw.institute.

The report is broadly promoted and presented at conferences, events, stakeholder briefings, RWI-hosted webinars, and more.

Create conversation spaces to encourage solution providers to build upon existing best practices and accurate market feedback.

The Technology Review is promoted via 3BL Media, Twitter, LinkedIn, and Facebook to generate broad interest and enable universal access.

For individuals seeking an easier or more accessible entry point into the work, we will produce podcasts, including interviews with CSR managers and technology providers.
REPORT OVERVIEW

SECTION 1

Market Analysis sets the stage for a review of solutions. Read to understand the most up-to-date perspective of the field including the history of the market, recent developments, and prominent trends.

SECTION 2

Featured Solutions provides a high-level overview of 40 platforms on the basis of features and functionality, technology specifications, and vendor support.

SECTION 3

Spotlight Solutions expands upon the comparison of solutions in Section 3, and examines 17 of the 40 featured solutions at a level of detail never before seen in the industry.

SECTION 4

What to Expect presents key considerations for the procurement, implementation and adoption of a technology platform.
SECTION 1
MARKET ANALYSIS

THE MOST UP-TO-DATE PERSPECTIVE OF VOLUNTEERING, GIVING AND GRANTS TECHNOLOGIES

Download the full report here.
SECTION 2

FEATURED SOLUTIONS

A COMPARISON OF 40 TECHNOLOGY SOLUTIONS

Download the full report here.
SECTION 3

SOLUTION SPOTLIGHTS

AN IN-DEPTH REVIEW OF
17 TECHNOLOGY SOLUTIONS
SECTION 4
WHAT TO EXPECT

KEY CONSIDERATIONS FOR THE PROCUREMENT, IMPLEMENTATION AND ADOPTION OF VOLUNTEERING, GIVING AND GRANTS TECHNOLOGIES

Download the full report here.
CORPORATE VOLUNTEERING, GIVING AND GRANTS TECHNOLOGY REVIEW

A GLOBAL COMPARISON AND ANALYSIS

2020 Edition coming July 2021
EARLY RESULTS: CSR MANAGERS

98 MANAGERS

88 COMPANIES

14 COUNTRIES

3.4 million EMPLOYEES
SECOND EDITION ENHANCEMENTS

AN EVEN BROADER LOOK AT THE MARKET.

Feature 60 platforms—minimum.
Greater global representation.
Spotlight 20 platforms.
Look at more features practitioners care about; for instance, features that support virtual volunteering.

Feature the nonprofit perspective: with which solutions do they work well? What’s missing for the nonprofit?
SECOND EDITION ADDITIONS

A FOCUS ON REMOTE EMPLOYEE ENGAGEMENT.

PLATFORMS. A close look at both platforms that run volunteering events and those that connect employees to opportunities.

VOLUNTEERING & GIVING OPPORTUNITIES. How are platforms providing employees with opportunities in their home communities?

SUPPORT. How are platforms enabling remote giving and volunteering communities and networks? How is peer-to-peer interaction enabled?
SECOND EDITION: TIMELINE

PLANNING

DATA COLLECTION

DATA ANALYSIS

REPORT BUILD

07/20
12/20
2/21
4/21
5/21
6/21
7/21

COMMS & PROMOTION

ANNOUNCE PUBLICATION DATE

REPORT BUILD

PUBLICATION & LAUNCH PROMOTION

PUBLICATION & LAUNCH EVENT

INSTITUTE

PUBLICATION & LAUNCH EVENT
TRENDS: COMPARISON 2019 AND 2020
Q3 Which program(s) does your organization have in place currently that are supported by technology? Check all that apply.

Answered: 98  Skipped: 0

- Giving or Gift Matching: 75.51% 74
- Volunteering: 90.82% 89
- Grantmaking: 66.33% 65

Total Respondents: 98

Q2 Which program(s) does your organization have in place currently that are supported by technology? Check all that apply.

Answered: 64  Skipped: 0

- Giving or Gift Matching: 89.06% 57
- Volunteering: 89.06% 57
- Grantmaking: 57.81% 37

Total Respondents: 64
Q5 How long has your organization been using your current platform?

Answered: 74  Skipped: 24

0-1 year: 12.16%  9
1-3 years: 35.14%  26
3-5 years: 24.32%  18
5-7 years: 9.46%   7
7-9 years: 5.41%   4
10+ years: 12.16%  9
TOTAL:  74

Q4 How long has your organization been using your current platform?

Answered: 46  Skipped: 18

<table>
<thead>
<tr>
<th>ANSWER CHOICES</th>
<th>RESPONSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-1 year</td>
<td>25.91%</td>
</tr>
<tr>
<td>1-3 years</td>
<td>30.43%</td>
</tr>
<tr>
<td>3-5 years</td>
<td>26.09%</td>
</tr>
<tr>
<td>5-8 years</td>
<td>8.70%</td>
</tr>
<tr>
<td>8-10 years</td>
<td>6.52%</td>
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<tr>
<td>10+ years</td>
<td>4.35%</td>
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<td>TOTAL</td>
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46 responses
Q8 Are you considering pursuing a switch to a new vendor in the near future?

Answered: 74  Skipped: 24

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<td>14.86%</td>
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<tr>
<td>No</td>
<td>47.30%</td>
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<td>Unsure/cannot say</td>
<td>37.84%</td>
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Q7 Are you considering pursuing a switch to a new vendor in the near future?

Answered: 46  Skipped: 18

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<thead>
<tr>
<th>ANSWER CHOICES</th>
<th>RESPONSES</th>
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</thead>
<tbody>
<tr>
<td>Yes</td>
<td>26.09%</td>
</tr>
<tr>
<td>No</td>
<td>41.33%</td>
</tr>
<tr>
<td>Unsure/cannot say</td>
<td>13.04%</td>
</tr>
<tr>
<td>TOTAL</td>
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</tbody>
</table>
Q12 What was the reason for switching to your current platform? Check all that apply.

Answered: 40   Skipped: 58

Q10 What was the reason for switching to your current platform? Check all that apply.

Answered: 31   Skipped: 33
Q13 Did switching platforms increase or decrease utilization (i.e. number of employees using the platform to participate in giving, volunteering and grants programs on an ongoing basis) with the program?

Answered: 40  Skipped: 58

- Increased
- Decreased
- Stayed the same
- Cannot say/Unsure

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Q11 Did switching platforms increase or decrease utilization (i.e. number of employees using the platform to manage personal giving/volunteering on an ongoing basis) with the program?

Answered: 31  Skipped: 33

- Increased
- Decreased
- Stayed the same
- Cannot say
Q14 Did switching platforms increase or decrease satisfaction (i.e. employee sentiment) with your organization's program(s)?

Answered: 40 Skipped: 58

Q12 Did switching platforms increase or decrease satisfaction (i.e. employee sentiment) with your organization's program(s)?

Answered: 31 Skipped: 33
Q16 How long did it take to obtain leadership buy-in to move forward with technology selection?

Answered: 35  Skipped: 63

Q14 How long did it take to obtain leadership buy-in to move forward with technology selection?

Answered: 27  Skipped: 37
Q18 How long was the procurement process from the point of RFP (request for proposal) to signing the vendor contract?

Answered: 35  Skipped: 63

Q15 How long was the procurement process from the point of RFP (request for proposal) to signing the vendor contract?

Answered: 27  Skipped: 37
Q19 Who was involved in shortlisting platforms for evaluation? Check all that apply.

Answered: 35    Skipped: 63

Q16 Who was involved in shortlisting platforms for evaluation? Check all that apply.

Answered: 27    Skipped: 37
Q20 What departments were involved in the selection decision? Check all that apply.

Answered: 35  Skipped: 63

Q17 What departments were involved in the selection decision? Check all that apply.

Answered: 27  Skipped: 37
Q21 How many platforms did you compare before selection?

Answered: 35  Skipped: 63

Q18 How many platforms did you compare before selection?

Answered: 27  Skipped: 37
Q22 Which of the below steps, if any, did you undertake to conduct due diligence on your shortlist? Check all that apply.

Answered: 35  Skipped: 63

Q19 What of the below steps, if any, did you undertake to conduct due diligence on your shortlist? Check all that apply.

Answered: 27  Skipped: 37
Q23 What was the total duration of time between the date of technology selection to the go-live date?

Answered: 35  Skipped: 63

Q21 What was the total duration of time between the date of technology selection to the go-live date?

Answered: 27  Skipped: 37
Q26 How easy to implement was the platform?

Answered: 44  Skipped: 54

Q24 How easy to implement was the platform?

Answered: 31  Skipped: 33

- Extremely Difficult
- Somewhat Difficult
- Moderate
- Somewhat Easy
- Easy
- Extremely Easy
Q31 How long did it take to implement the platform?

Answered: 44  Skipped: 54

1-3 months
4-6 months
7-12 months
13-18 months
19-24 months
24+ months
Cannot say/Unsure

Q29 How long did it take to implement the platform?

Answered: 31  Skipped: 33

1-3 months
3-6 months
6-12 months
12-18 months
18-24 months
24+ months
Unsure/cannot say
In order to ensure more predictable and expedient implementations, technical, analytical, and change management skills must be brought together in new and existing roles, or as part of cross-trained inter-disciplinary teams.
EMPLOYEE ACTIVITY ON PLATFORMS
Q47 What percentage of your total employee base activated as users (i.e. signed up/logged on) on the platform upon launch?

Answered: 68     Skipped: 30

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<tr>
<th>ANSWER CHOICES</th>
<th>RESPONSES</th>
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<tbody>
<tr>
<td>0-1% of total employee base</td>
<td>8.82%</td>
</tr>
<tr>
<td>2-5% of total employee base</td>
<td>10.29%</td>
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<tr>
<td>6-10% of total employee base</td>
<td>5.88%</td>
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<td>11-20% of total employee base</td>
<td>11.76%</td>
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<td>21-30% of total employee base</td>
<td>8.82%</td>
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<td>8.82%</td>
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<tr>
<td>90-100% of total employee base</td>
<td>4.41%</td>
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<tr>
<td>Unsure/cannot say</td>
<td>26.47%</td>
</tr>
<tr>
<td>TOTAL</td>
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</tbody>
</table>
Q48 Engaged (performs three or more transactions per year in the platform, including logging volunteer hours, making donations, etc., but excluding agreeing to terms and conditions, making a profile, etc.)?

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<tr>
<th>Answer Choices</th>
<th>Responses</th>
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</thead>
<tbody>
<tr>
<td>0-1% of total employee base</td>
<td>13.24%</td>
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<tr>
<td>2-5% of total employee base</td>
<td>11.76%</td>
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<tr>
<td>6-10% of total employee base</td>
<td>7.35%</td>
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<tr>
<td>11-20% of total employee base</td>
<td>16.18%</td>
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<td>8.82%</td>
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<td>50-90% of total employee base</td>
<td>2.94%</td>
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<td>90-100% of total employee base</td>
<td>2.94%</td>
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<tr>
<td>Unsure/cannot say</td>
<td>26.47%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
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</table>
Q49 Occasional (performs one or two transactions per year)?

Answered: 68  
Skipped: 30

**ANSWER CHOICES**

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<td>0-1% of total employee base</td>
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<td>50-90% of total employee base</td>
<td>5.88%</td>
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<tr>
<td>90-100% of total employee base</td>
<td>2.94%</td>
</tr>
<tr>
<td>Unsure/cannot say</td>
<td>29.41%</td>
</tr>
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</table>

**TOTAL** | 68
Q50 Dormant (performs no transactions; never activated/logged in)?

Answered: 68  Skipped: 30

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<th>ANSWER CHOICES</th>
<th>RESPONSES</th>
</tr>
</thead>
<tbody>
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<td>0-1% of total employee base</td>
<td>10.29%</td>
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<td>2-5% of total employee base</td>
<td>2.94%</td>
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<td>6-10% of total employee base</td>
<td>4.41%</td>
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<tr>
<td>11-20% of total employee base</td>
<td>2.94%</td>
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<tr>
<td>21-30% of total employee base</td>
<td>7.35%</td>
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<tr>
<td>31-50% of total employee base</td>
<td>13.24%</td>
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<td>50-90% of total employee base</td>
<td>17.65%</td>
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<tr>
<td>90-100% of total employee base</td>
<td>2.94%</td>
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<tr>
<td>Unsure/cannot say</td>
<td>38.24%</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td><strong>68</strong></td>
</tr>
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</table>
Q51 How were end-users trained on the new platform? Check all that apply.

Answered: 68       Skipped: 30

**ANSWER CHOICES**                  | **RESPONSES**
------------------------------------|-------------
In-person/classroom (onsite, delivered by platform vendor) | 5.88% (4)   
In-person/classroom (onsite, delivered by third-party vendor) | 0.00% (0)   
In-person/classroom (onsite, delivered by internal IT team) | 2.94% (2)   
Webinar (delivered by platform vendor) | 19.12% (13) 
Webinar (delivered by third-party vendor) | 2.94% (2)   
Webinar (delivered by my internal IT team) | 14.71% (10) 
Self-taught, based on platform vendor or third-party vendor materials | 51.47% (35) 
Other (please specify): | 36.76% (25) 

Total Respondents: 68
Q63 What results or metrics do you measure using the platform?

Answered: 68  Skipped: 30

**Answer Choices**

<table>
<thead>
<tr>
<th>Option</th>
<th>Responses</th>
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</thead>
<tbody>
<tr>
<td>Program activities (e.g. events, audiences, participants)</td>
<td>69.12%</td>
</tr>
<tr>
<td>Program outputs (e.g. number of users, number of hours logged, amounts donated, events hosted, etc.)</td>
<td>92.65%</td>
</tr>
<tr>
<td>Program outcomes (i.e. changes in awareness, attitude, knowledge, skills, etc. resulting from activities)</td>
<td>23.53%</td>
</tr>
<tr>
<td>Program impacts (i.e. long-term changes from the programs, such as policy changes, capacity and productivity, organizational or institutional change, improved working conditions, etc.)</td>
<td>16.18%</td>
</tr>
<tr>
<td>N/A - We don't measure anything using the platform</td>
<td>2.94%</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>7.35%</td>
</tr>
</tbody>
</table>

Total Respondents: 68
Q65 Were you a part of any user-groups related to your platform (e.g. groups of companies that use the same platform to discuss what's working and what's not)?

Answered: 68    Skipped: 30

**Answer Choices**

- Yes, as a grassroots user group of other companies separate from the vendor: 29.41% (20)
- Yes, as part of a vendor-facilitated user group: 38.24% (26)
- No, we are not a part of any user groups and don't wish to be: 4.41% (3)
- No, but we may participate in a user group if we were made aware of one: 36.76% (25)
- Other (please specify): 7.35% (5)

Total Respondents: 68
Designing an international program is difficult enough but finding a platform with the "out-of-the-box" flexibility to support it in a localized fashion is even more challenging. Reducing programs to the lowest common denominator risks losing the variety that employees and other end-users are seeking, and in turn, diluting both giving and volunteering numbers.
COVID-19 AND SOCIAL JUSTICE ISSUES IN 2020
Initial Analysis

- **INSIGHT:** Most CSR managers relied on their technology platform to facilitate some type of response involving employees.
- **OPPORTUNITY:** Expand the value proposition of the technology platform by including guidance and information about the social / health issue as well as actionable steps to contribute support.

Q66 How did your organization leverage your workplace giving and volunteering technology to facilitate COVID-19 response? Check all that apply.

**Answer Choices**

<table>
<thead>
<tr>
<th>Response</th>
<th>Responses</th>
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<tbody>
<tr>
<td>N/A - We did not use our platform to help facilitate COVID-19 response</td>
<td>10.34%</td>
</tr>
<tr>
<td>Curated volunteering opportunities</td>
<td>51.72%</td>
</tr>
<tr>
<td>Facilitated volunteering events</td>
<td>39.66%</td>
</tr>
<tr>
<td>Used it as a tool to engage employees while out of the office</td>
<td>39.66%</td>
</tr>
<tr>
<td>Allowed employees to find and create volunteering events</td>
<td>48.28%</td>
</tr>
<tr>
<td>Set up and facilitated employee giving campaigns (e.g. matching gifts)</td>
<td>53.45%</td>
</tr>
<tr>
<td>Set up and facilitated grants campaigns (e.g. dollars for doors)</td>
<td>27.59%</td>
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<tr>
<td>Reported on metrics (e.g. hours and dollars)</td>
<td>43.10%</td>
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<tr>
<td>Other (please specify):</td>
<td>15.52%</td>
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Total Respondents: 58
Initial Analysis

- **INSIGHT:** COVID-19 significantly reduced real-world volunteering
- **OPPORTUNITY:** Encourage vendors to consider building out native online volunteering opportunities.

Q68 From your perspective, how did COVID-19 impact the level of volunteering activity on your company’s platform?

**Answer Choices**

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<tr>
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<td>Increased</td>
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<tr>
<td>Decreased</td>
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<td>Stayed the same</td>
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<td>8.62%</td>
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Answered: 58  Skipped: 26
Initial Analysis

- **INSIGHT:** Good technology is instrumental in funneling financial resources to areas of need
- **OPPORTUNITY:** Build out the database of organizations and the issues/communities/geographies they represent to better facilitate giving

Q69 From your perspective, how did COVID-19 impact the level of giving activity on your company’s platform?

**Answer Choices**

<table>
<thead>
<tr>
<th>Answer Choices</th>
<th>Responses</th>
<th>Percentages</th>
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<tbody>
<tr>
<td>Increased</td>
<td>30</td>
<td>51.72%</td>
</tr>
<tr>
<td>Decreased</td>
<td>4</td>
<td>6.90%</td>
</tr>
<tr>
<td>Stayed the same</td>
<td>9</td>
<td>15.52%</td>
</tr>
<tr>
<td>Cannot say/Unsure</td>
<td>9</td>
<td>15.52%</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>6</td>
<td>10.34%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>58</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>
Initial Analysis

- **INSIGHT:** The majority of companies depend SOLELY on their vendor to facilitate giving and support during a crises.
- **OPPORTUNITY:** As the primary means of volunteering and giving for employees at most companies, the role and influence of the technology platform is more significant than is typically understood in the philanthropic circle/field.

Q72 As a result of COVID-19, did you invest in supplemental giving and/or volunteering technologies or platform partnerships (e.g. an additional platform with native virtual volunteering capabilities)?

Answered: 58  Skipped: 26

- Yes (please specify...)
- No
- Cannot say/Unsure

[Bar chart showing the distribution of responses]
Initial Analysis

- **INSIGHT:** As survey participants were able to check multiple options here, it is clear that technology vendors are positioned to have **SIGNIFICANT** influence on giving.
- **OPPORTUNITY:** Given the influence built into this technology, vendors should evaluate the potential for built-in bias in the design of the technology and look for opportunities to guide volunteering and giving efforts using behavioral science.

Q73 How did your organization leverage your workplace giving and volunteering technology to facilitate response to social unrest (e.g. Black Lives Matter, civic unrest in the USA, global social disaster response, etc.)? Check all that apply.

<table>
<thead>
<tr>
<th>ANSWER CHOICES</th>
<th>RESPONSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A - We did not use our platform to help facilitate COVID-19 response</td>
<td>17.54%</td>
</tr>
<tr>
<td>Curated volunteering opportunities</td>
<td>28.07%</td>
</tr>
<tr>
<td>Facilitated volunteering events</td>
<td>22.81%</td>
</tr>
<tr>
<td>Used it as a tool to engage employees while out of the office</td>
<td>33.33%</td>
</tr>
<tr>
<td>Allowed employees to find and create volunteering events</td>
<td>36.84%</td>
</tr>
<tr>
<td>Set up and facilitated employee giving campaigns (e.g. matching gifts)</td>
<td>49.12%</td>
</tr>
<tr>
<td>Set up and facilitated grants campaigns (e.g. dollars for donors)</td>
<td>19.30%</td>
</tr>
<tr>
<td>Reported on metrics (e.g. hours and dollars)</td>
<td>20.82%</td>
</tr>
<tr>
<td>Other (please specify):</td>
<td>10.53%</td>
</tr>
</tbody>
</table>

Total Respondents: 57
Initial Analysis

• **INSIGHT:** Unlike the responses to COVID-19 when asked the same question, these technology platforms enabled employees to support organizations addressing racial unrest.

• **OPPORTUNITY:** With this initial response (increase) in volunteering related to social unrest we would recommend further enhancement to these platforms to continue opportunities to move beyond virtue signaling to some type of action.

Q75 From your perspective, how did events of social unrest impact the level of volunteering activity on your company's platform?

<table>
<thead>
<tr>
<th>ANSWER CHOICES</th>
<th>RESPONSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased</td>
<td>22.81%</td>
</tr>
<tr>
<td>Decreased</td>
<td>5.26%</td>
</tr>
<tr>
<td>Stayed the same</td>
<td>24.56%</td>
</tr>
<tr>
<td>Cannot say/Unsure</td>
<td>35.09%</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>12.28%</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
</tr>
</tbody>
</table>
Initial Analysis

- **INSIGHT:** We expected to see this response, a significant increase in giving money to organizations.
- **OPPORTUNITY:** CSR managers may require further training and support to position the giving opportunities for success at their company – as over 35% were unsure of the connection between giving and the social unrest of 2020.
**Initial Analysis**

- **INSIGHT:** The responses here are somewhat unexpected as they mirror the percentages in the previous slide concerning employee giving and matching.
- **OPPORTUNITY:** As with the previous slide, the recommendation is to expand the value proposition of the technology platform by including guidance and information about the social / health issue as well as actionable steps to contribute support.

**Q77 From your perspective, how did events of social unrest impact the level of grantmaking activity on your company’s platform?**

<table>
<thead>
<tr>
<th>ANSWER CHOICES</th>
<th>RESPONSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased</td>
<td>31.58%</td>
</tr>
<tr>
<td>Decreased</td>
<td>1.75%</td>
</tr>
<tr>
<td>Stayed the same</td>
<td>19.30%</td>
</tr>
<tr>
<td>Cannot say/Unsure</td>
<td>36.84%</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>10.53%</td>
</tr>
</tbody>
</table>

**TOTAL:** 57
The RW Institute is a think tank, founded by Realized Worth, focused entirely on broad efforts to advance the practice and theory of corporate citizenship through innovative projects, research, analysis and public policy advocacy. Through networking opportunities, learning and development programs, innovative research, and thought leadership, RWI enhances corporate citizenship efforts and connects key change-makers to like-minded leaders around the world.

RWI and Realized Worth do not own, endorse or partner with any workplace giving platform themselves, and remain platform-agnostic to deliver a completely unbiased report.

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Future Opportunities to Engage

As a Corporate Social Responsibility leader, complete this survey, sharing your experience partnering with CSR technology providers. *

Share the end user survey with colleagues in your organization who use the technology to give, grant and/or volunteer. *

*RW Institute will award one lucky participant an iPad, chosen by random drawing, by 8/31/2021.


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