



2020 Technology Review:

Highlighting giving, volunteering & grants
technology

In Partnership



With Support From:



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 Charlotte
Community
Affairs
Professionals



A Special Program of
Foundation For The Carolinas

CCAP Members

Allstate Insurance Company

Ally Financial

Alston & Bird LLP

Atrium Health

AvidXchange

Bank of America

Barings

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

CCAP Charlotte
Community
Affairs
Professionals



A Special Program of
Foundation For The Carolinas

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



CORPORATE VOLUNTEERING, GIVING AND GRANTS TECHNOLOGY REVIEW: 2020 EDITION

A GLOBAL COMPARISON AND ANALYSIS

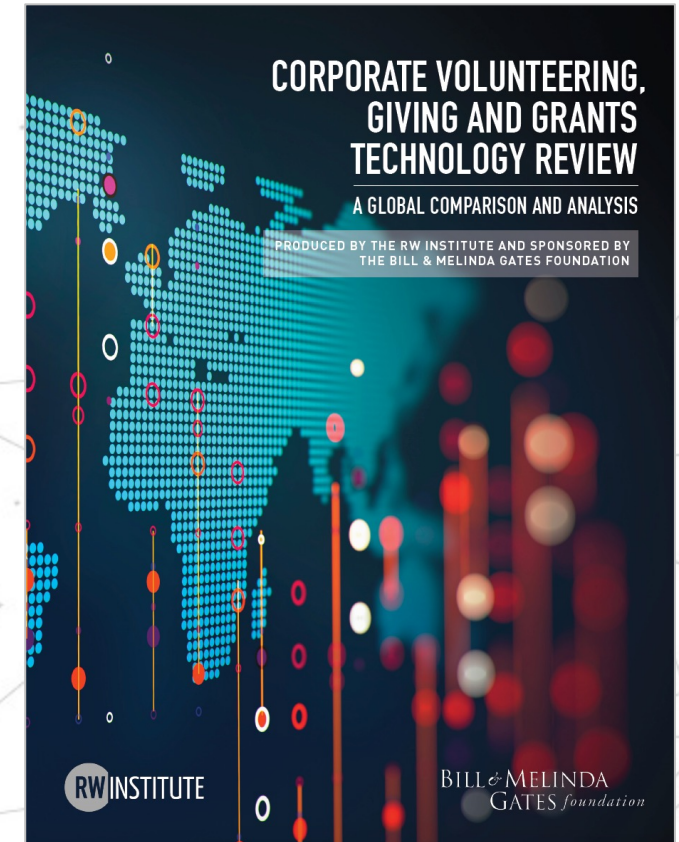
PRODUCED BY THE RW INSTITUTE IN PARTNERSHIP WITH THE BILL & MELINDA GATES
FOUNDATION WITH SUPPORT FROM FOUNDATION FOR THE CAROLINAS AND E4E RELIEF

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

REPORT OVERVIEW



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

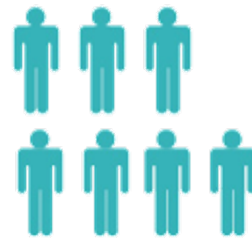
SOLUTION PROVIDERS
AGREED TO PARTICIPATE IN
OUR RESEARCH

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

REPORT OVERVIEW



“ 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

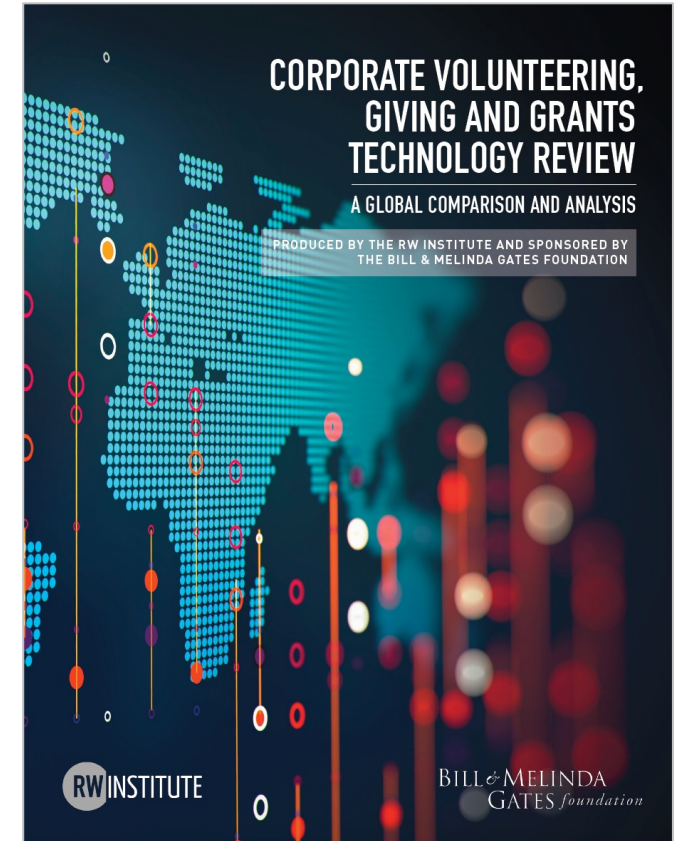
RESULTS

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

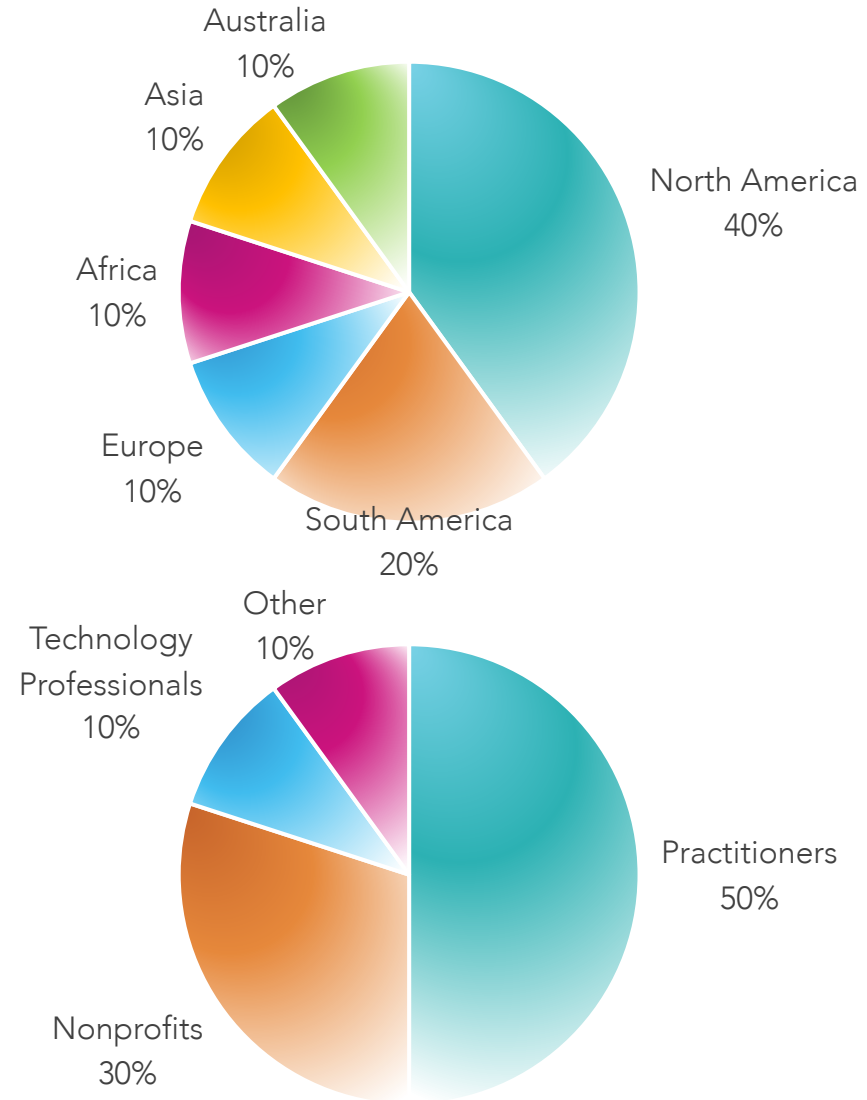


RESULTS

1,600+
DOWNLOADS GLOBALLY

GEORGRAPHY

AUDIENCE



RESULTS

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

KNOWLEDGE DISSEMINATION



OPEN ACCESS

This report is available for free download on the RW Institute website: <http://www.rw.institute>.



PRESENTATIONS

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



FIELD BUILDING

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



MEDIA & PR

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



PODCASTS

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.](#)

MARKET TREND: WHERE IS THE CSR TECHNICAL ANALYST?

- Finding unicorns is hard
- Blend of subject-matter expertise and technical, project management, business analysis, and relationships management
- Similar challenge to HR, Marketing, Finance, Supply Chain where technical analysts/specialists are now common

MARKET TREND: NAVIGATING INFORMATION ASSYMETRY

- Solution vendors and practitioners have a knowledge gap

FEW PRACTITIONERS PURSUE FULLY-COSTED BUSINESS CASES, COST-BENEFIT WHEN PROCURING TOOLS



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MARKET TREND: COMPRESSING TIME TO GO-LIVE

TOP 5 REASONS FOR DELAYS IN IMPLEMENTATION



ONLY 4% OF ORGANIZATIONS PARTNER WITH THIRD PARTIES FOR IMPLEMENTATION



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A COMPARISON OF 40 TECHNOLOGY SOLUTIONS

[Download the full report here.](#)

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SECTION 3

SOLUTION SPOTLIGHTS

AN IN-DEPTH REVIEW OF
17 TECHNOLOGY SOLUTIONS

[Download the full report here.](#)

APLANET COMMUNITY

VOLUNTEERING & GIVING

THE BASICS

VENDOR NAME Aplanet	HQ Biscay, Spain	FOUNDED 2019	EMPLOYEES 11-50
CLIENT BASE 15 corporations	ORG MARKET All	R&D INVESTMENT Declined to disclose	FEE STRUCTURE Declined to disclose

AT-A-GLANCE

APLANET COMMUNITY IS A CLOUD-BASED PLATFORM AND MOBILE APP FOR LAUNCHING SOCIAL AND VOLUNTEERING INITIATIVES. ALL INITIATIVES ARE MAPPED TO THE UN SUSTAINABLE DEVELOPMENT GOALS, WHICH IS USED TO MEASURE AND REPORT ON COMMUNITY IMPACT.

Initiatives can be organization- or community-wide, allowing for the option of friends, family or peers of the organization to participate in events.

Mobile one-tap registration makes signing up for initiatives easy for employees and the community. Through individual profiles, employees can log volunteering hours directly or via QR codes validated by administrators or nonprofits. The platform generates a **social CV** for the employee that records causes they care about and tracks individual impact.

Administrators can launch organization-specific initiatives or import opportunities from nonprofit partners. Aplanet Community provides administrators with data-driven reporting and program management capabilities. A detailed dashboard displays feedback about each initiative, organizer, volunteer, and tracks **skills acquired** by employees through initiatives. Unique to Aplanet are the robust organizational collaboration tools, opening the door to broader community impact.

The platform is currently available in Spain, Brazil, Mexico, Portugal and USA, and serves all types of organizations, including corporations, education and government institutions. Aplanet's short-term roadmap includes the development of in-demand **dollars for doers** functionality, among other features.

DEEP DIVE

VOLUNTEERING

Volunteer opportunity & event search
Proprietary volunteer opportunity

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

	One-Way	Two-Way	INCLUDES...
Communications (Internal)	One-Way	Two-Way	Broadcast via email, SMS, mobile push notifications (admin-user)
Communications (External)	One-Way	Two-Way	Broadcast via email, SMS, mobile push notifications (admin-volunteer (non-employee))
Sharing (Internal)	Available	Unavailable	
Sharing (External)	Available	Unavailable	Social media sharing

USABILITY

	URL	Mobile-Friendly	SSO	Username & Password
Access	Workflows	Notifications	Form Auto-Population	
Automation	Rules & Alerts	Field Completion	Format Validation	Submission Warnings & Blocks
Error Identification	Logo	Colors	Layout	Native Error Support
Look & Feel	Keyword	Event/Opportunity	Nonprofit/Association	Social Media Tags
Search				Localizations
				White Label

ARCHITECTURE

	Windows (Browser)	OS (Browser)	Linux (Browser)	Android (Browser)	iOS (Browser)
Compatibility	On-Premise	Cloud (SaaS) (Multi-Tenant)	Hybrid		
Deployment	Single Entity	Multi-Site	Multi-Country	Global	
Global	Out-of-the-box APIs	Custom Integration	HTTP REST API, Geo-location API, SparkPost, Esendex, Inceptier, Herjar, Google Analytics, Digital Ocean		
Integration					

SECURITY

	Compliant	Non-Compliant
GDPR	Owner (System Admin)	Admin (Full Admin)
Permissions	Editor (Restricted Admin)	Viewer (User)

3 VENDOR SUPPORT

	On-Screen Alerts	On-Screen Explanations	Self-Service Fixes	Integrated Help Options
Exception Management	1-3 Months	6-8 Months	7-12 Months	12-18 Months
Implementation Time	19-24 Months	24+		

SECTION 4

WHAT TO EXPECT

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

[Download the full report here.](#)

ADOPTION: OVERVIEW



FREQUENCY OF GIVING:
5 TIMES OVER 6 MONTHS (14%)

HOURS VOLUNTEERED:
1-6 HOURS A MONTH (14%)

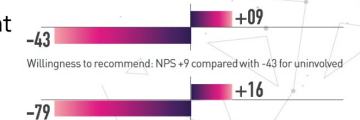
GAVE TO A NONPROFIT OR CHARITY:
A FEW (14%)

- The hopeful message is that a majority indicated that the platform was better at helping them give or volunteer and made the experience more enjoyable,
- Yet over 50% reported no change in giving or volunteering, so work remains to be done and technology alone does not solve it

IMPLEMENTATION: WHO SHOULD BE INVOLVED?

- As with procurement, implementation involved internal teams from CSR, legal, HR, communications, and IT
- Personal involvement (or lack thereof) in implementation was even more impactful on sentiment than involvement in procurement

PERSONAL INVOLVEMENT IN
IMPLEMENTATION IMPROVED
PRACTITIONER SENTIMENT FOR
THEIR SOLUTION



PROCUREMENT: HOW LONG SHOULD IT TAKE?

- For many practitioners, their current solution is also their first
- Almost 80% are unlikely to recommend their current solution

END-TO-END PROCUREMENT TIMELINE BASED ON A TYPICAL DEPLOYMENT.



RW INSTITUTE

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CORPORATE VOLUNTEERING, GIVING AND GRANTS TECHNOLOGY REVIEW

A GLOBAL COMPARISON AND ANALYSIS

2020 Edition coming July 2021

EARLY RESULTS: CSR MANAGERS

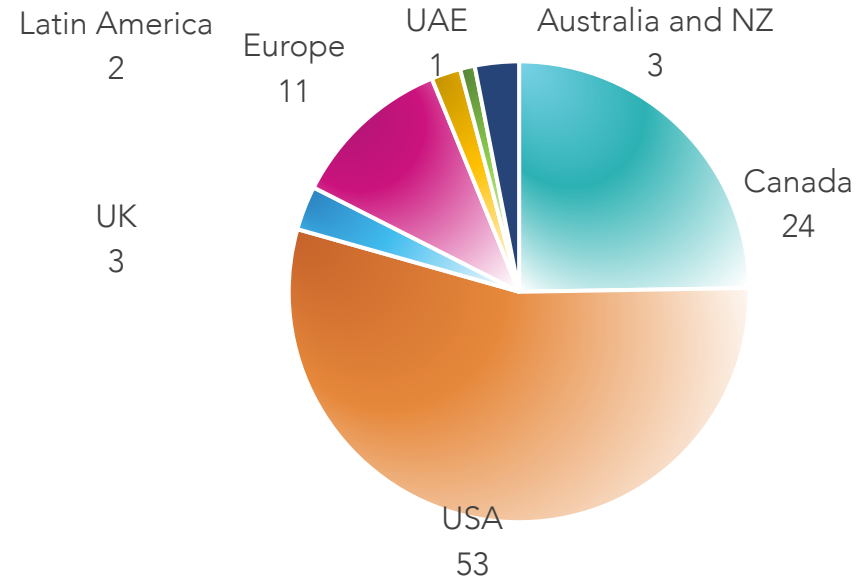
98 MANAGERS

88 COMPANIES

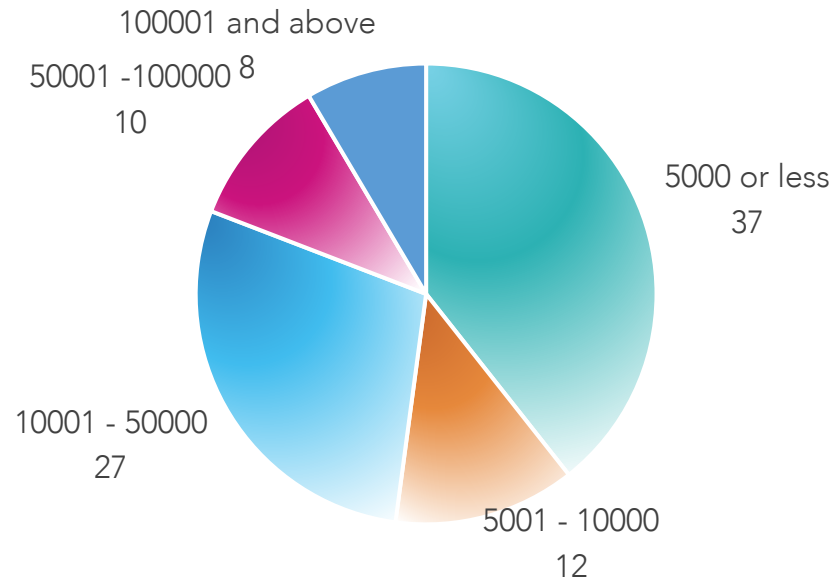
14 COUNTRIES

3.4 million EMPLOYEES

GEORGRAPHY



AUDIENCE



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

REPORT BUILD

PLANNING

DATA COLLECTION

DATA ANALYSIS

REPORT BUILD

07/20

12/20

2/21

4/21

5/21

6/21

7/21

ANNOUNCE
PUBLICATION
DATE

PUBLICATION & LAUNCH PROMOTION

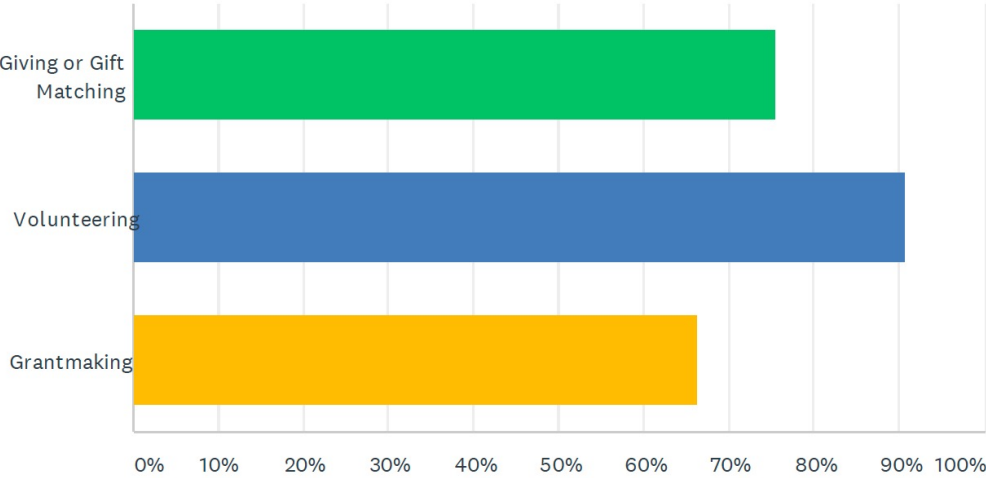
PUBLICATION &
LAUNCH EVENT

COMMS & PROMOTION

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.

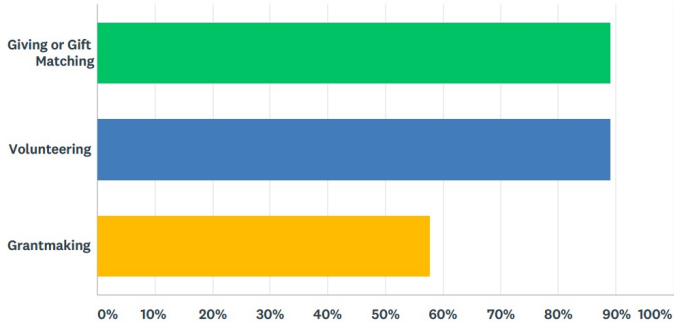
Answered: 98 Skipped: 0



ANSWER CHOICES	RESPONSES	
Giving or Gift Matching	75.51%	74
Volunteering	90.82%	89
Grantmaking	66.33%	65
Total Respondents: 98		

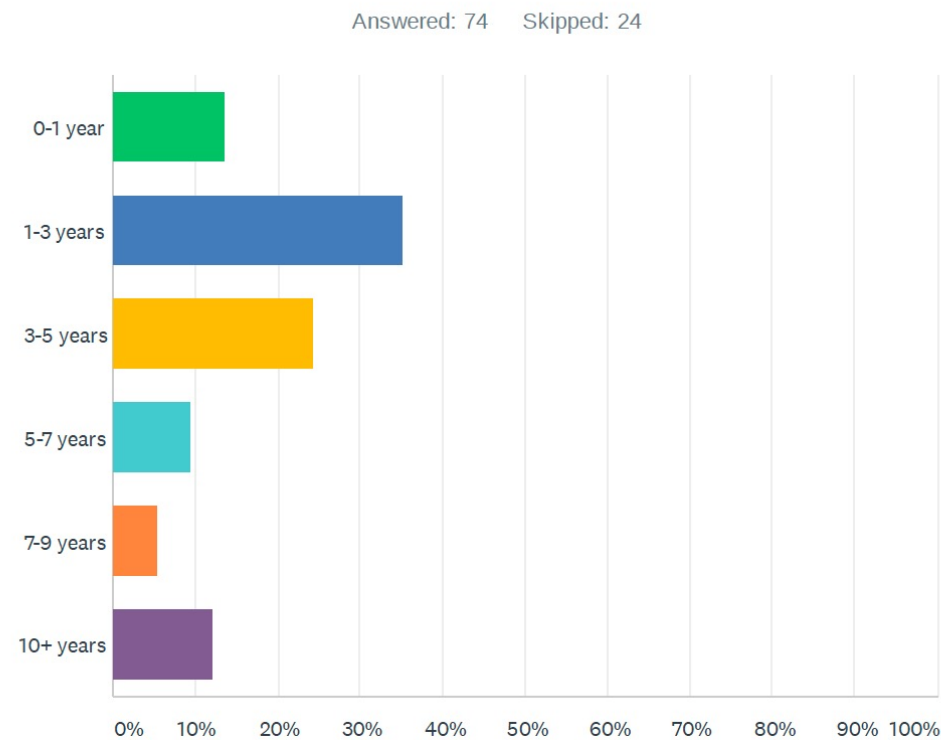
Q2 Which program(s) does your organization have in place currently that are supported by technology? Check all that apply.

Answered: 64 Skipped: 0



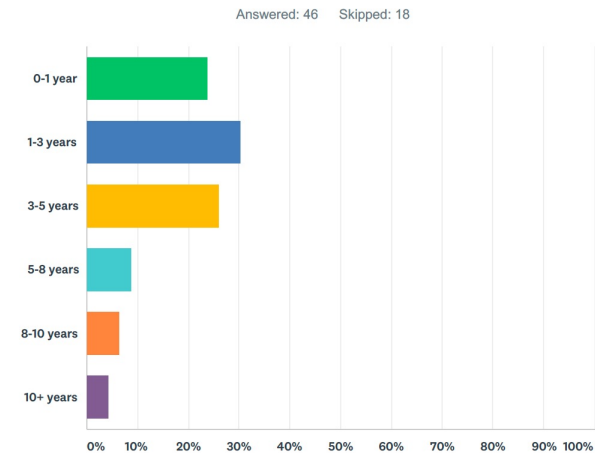
ANSWER CHOICES	RESPONSES	
iving or Gift Matching	89.06%	57
olunteering	89.06%	57
rantmaking	57.81%	37
otal Respondents: 64		

Q5 How long has your organization been using your current platform?



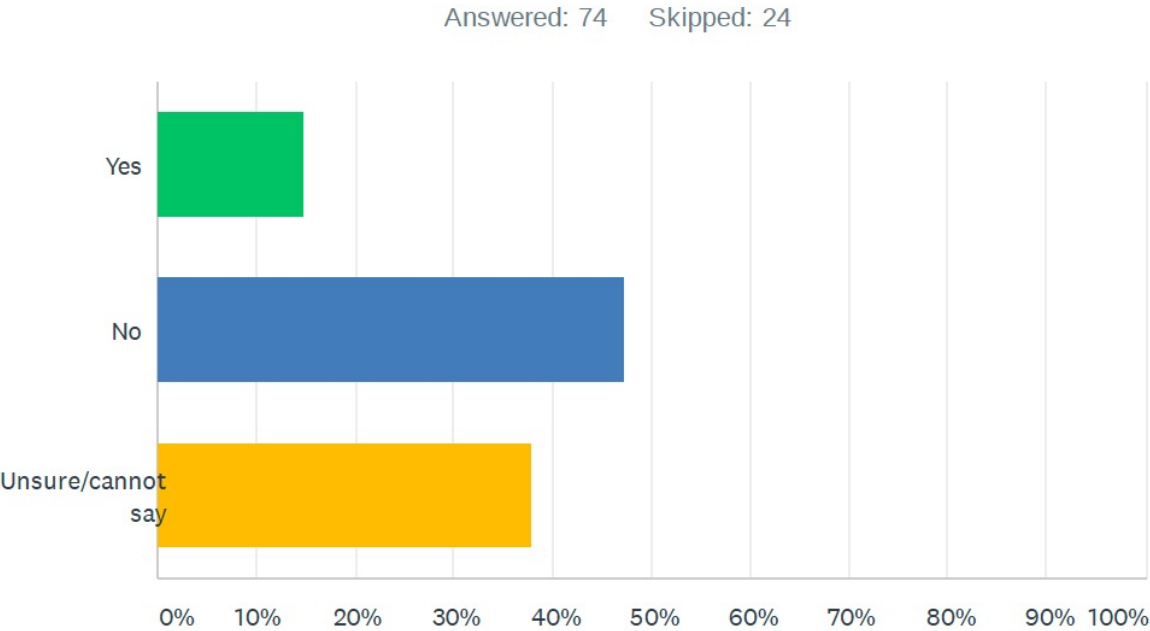
ANSWER CHOICES	RESPONSES	
0-1 year	13.51%	10
1-3 years	35.14%	26
3-5 years	24.32%	18
5-7 years	9.46%	7
7-9 years	5.41%	4
10+ years	12.16%	9
TOTAL		74

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



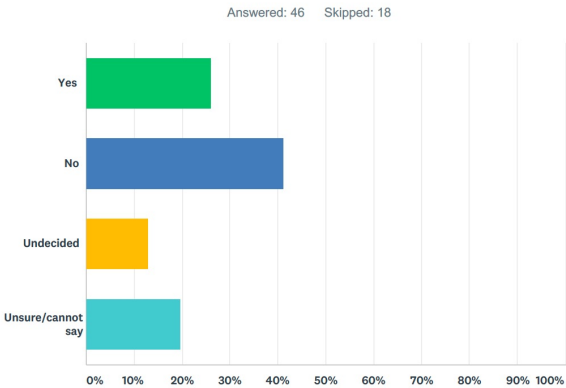
ANSWER CHOICES	RESPONSES	
0-1 year	23.91%	11
1-3 years	30.43%	14
3-5 years	26.09%	12
5-8 years	8.70%	4
8-10 years	6.52%	3
10+ years	4.35%	2
TOTAL		46

Q8 Are you considering pursuing a switch to a new vendor in the near future?



ANSWER CHOICES	RESPONSES	
Yes	14.86%	11
No	47.30%	35
Unsure/cannot say	37.84%	28
TOTAL		74

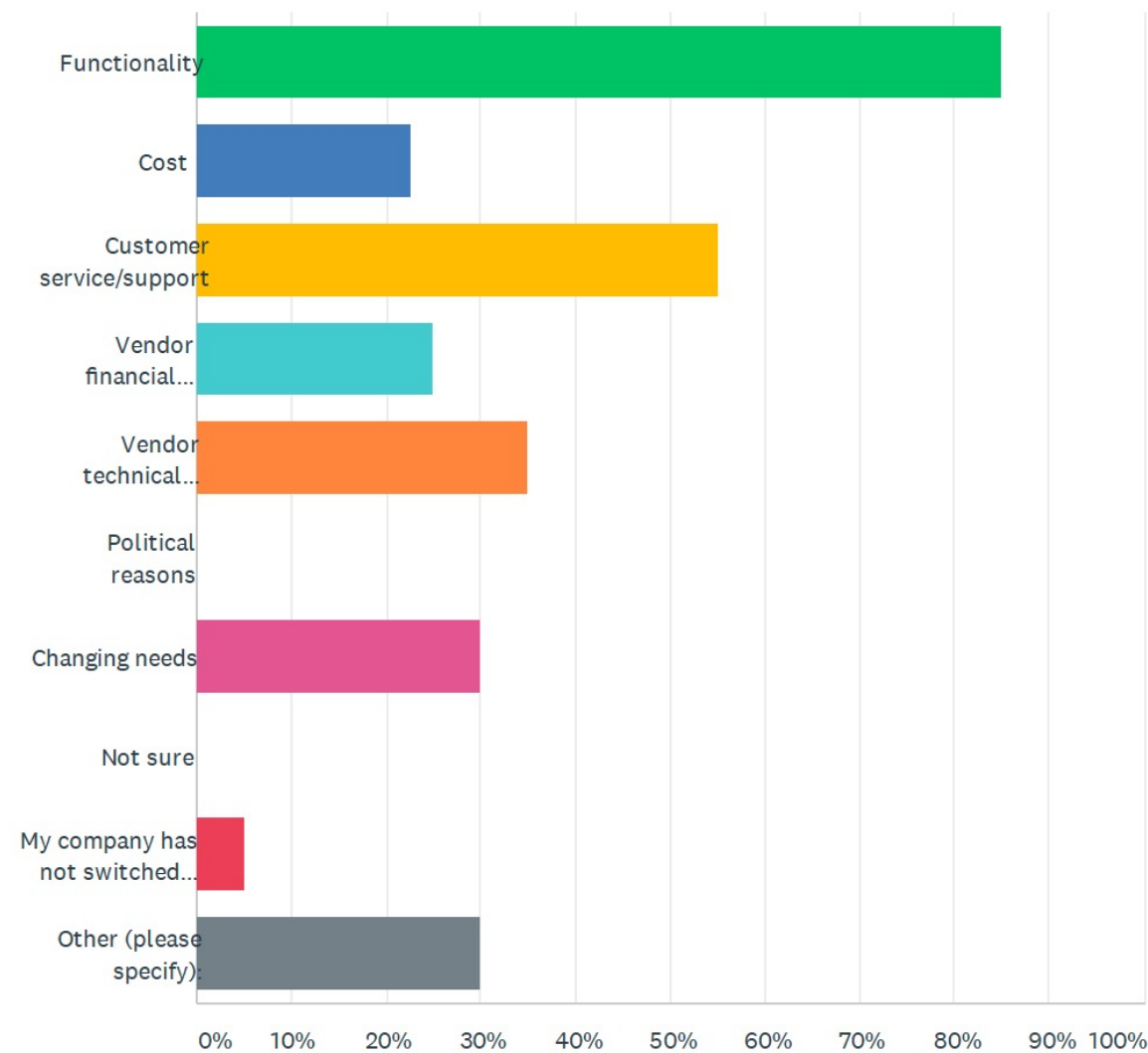
Q7 Are you considering pursuing a switch to a new vendor in the near future?



ANSWER CHOICES	RESPONSES	
Yes	26.09%	12
No	41.30%	19
Undecided	13.04%	6
Unsure/cannot say	19.57%	9
TOTAL		46

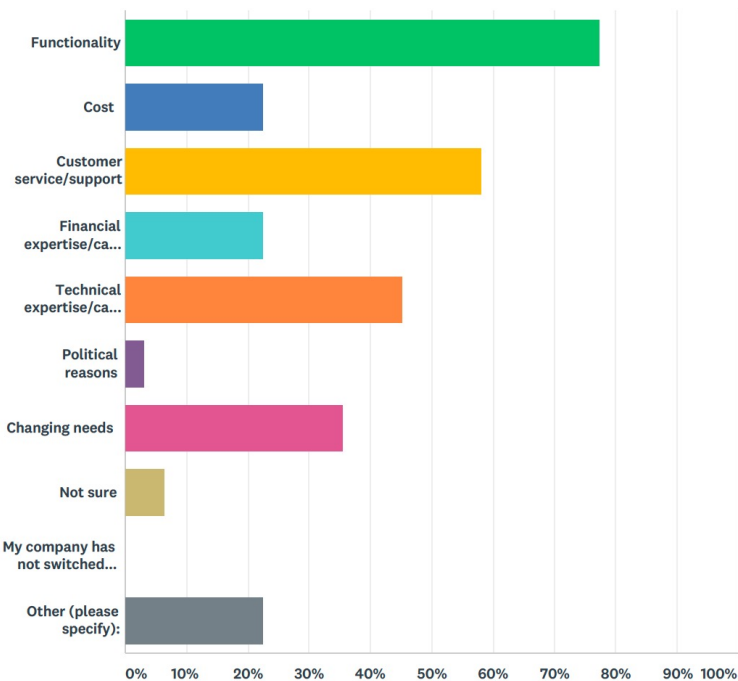
Q12 What was the reason for switching to your current platform? Check all that apply.

Answered: 40 Skipped: 58



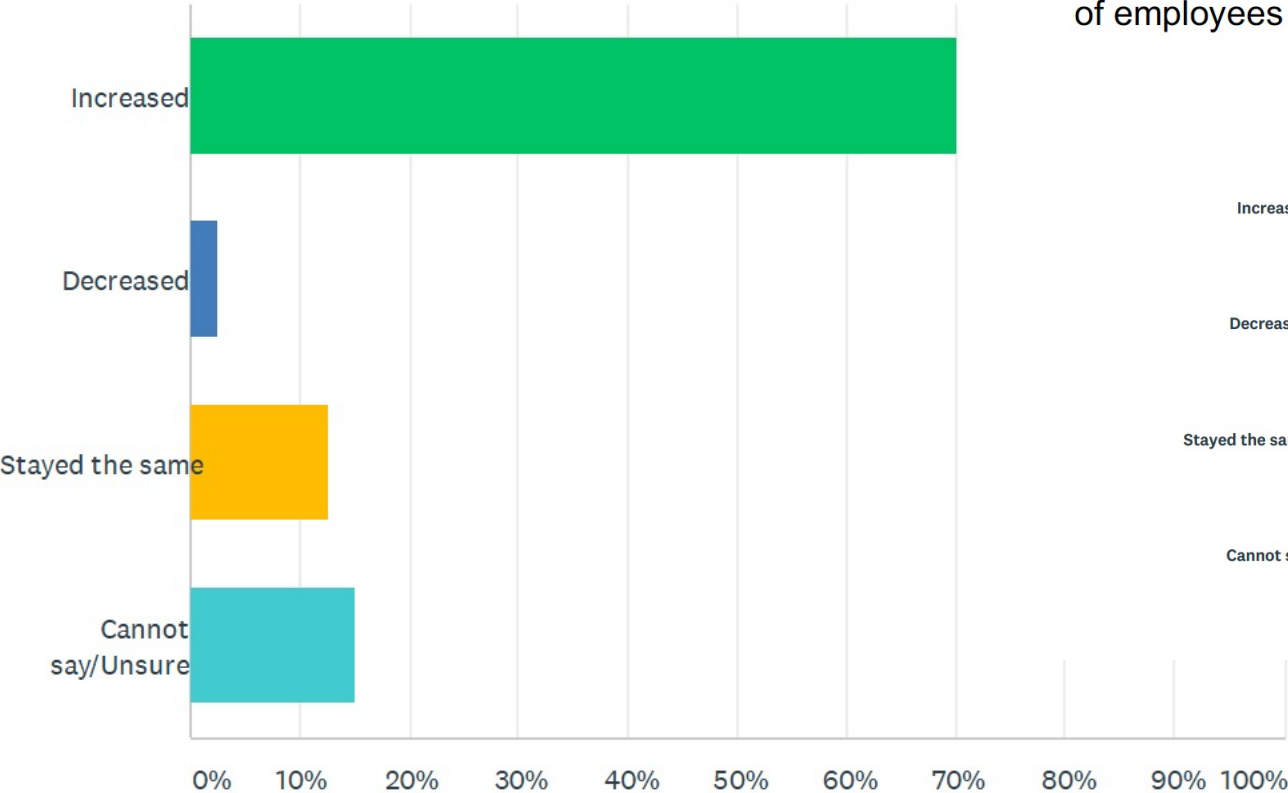
Q10 What was the reason for switching to your current platform? Check all that apply.

Answered: 31 Skipped: 33



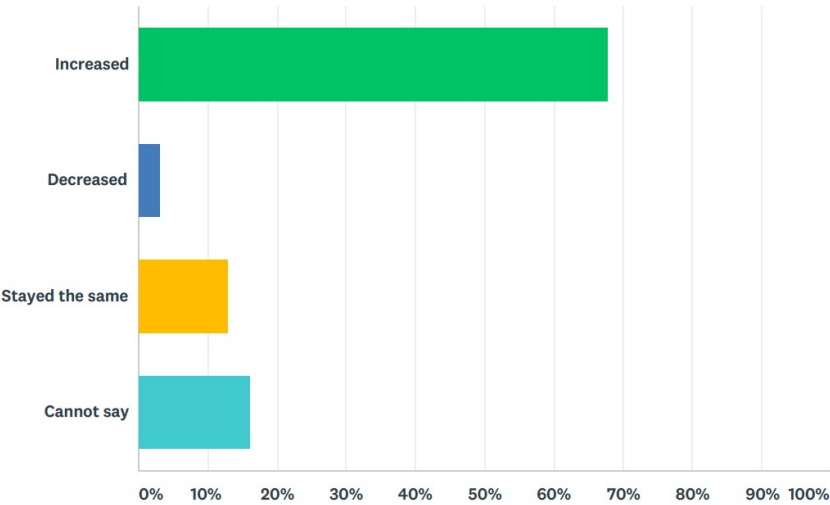
Q13 Did switching platforms increase or decrease utilization (i.e. number of employees using the platform to participate in giving, volunteering and grants programs on an ongoing basis) with the program?

Answered: 40 Skipped: 58



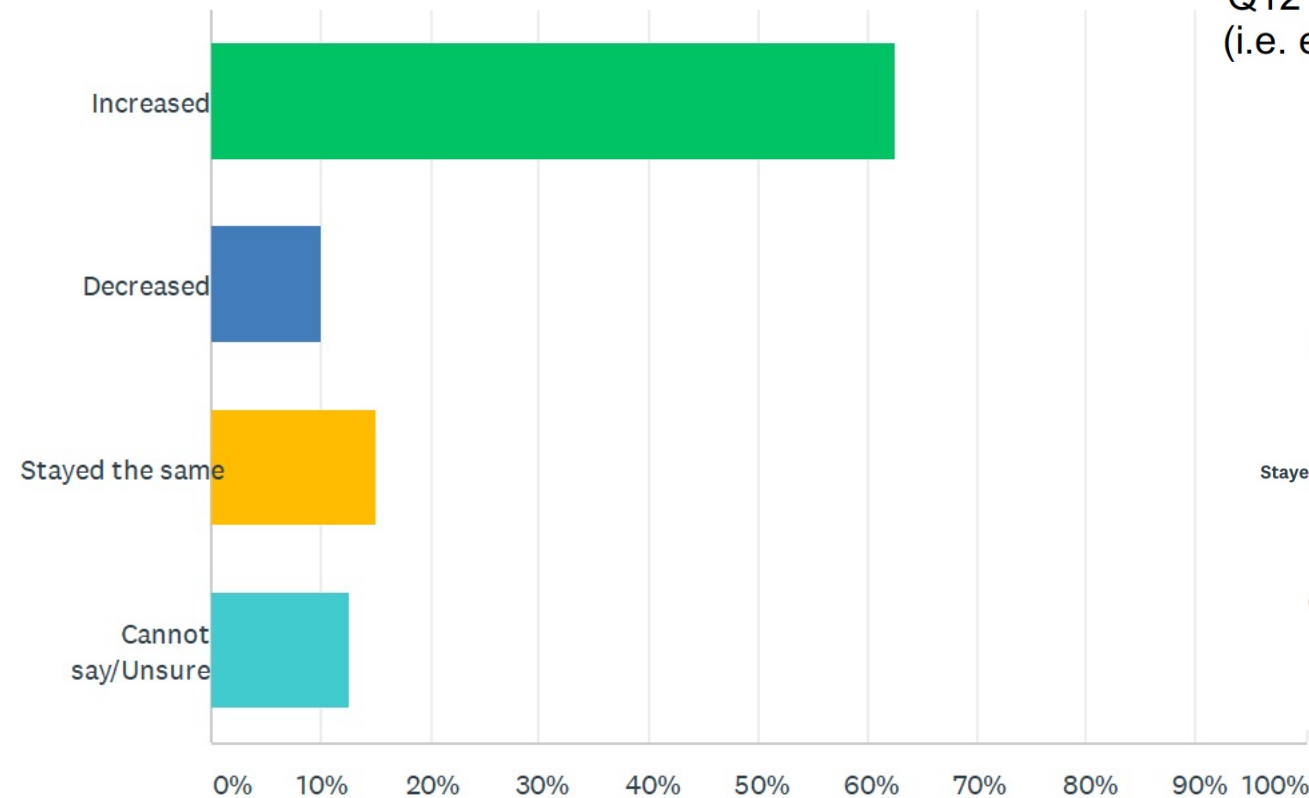
Q11 Did switching platforms increase or decrease utilization (i.e. number of employees using the platform to manage personal giving/volunteering on an ongoing basis) with the program?

Answered: 31 Skipped: 33



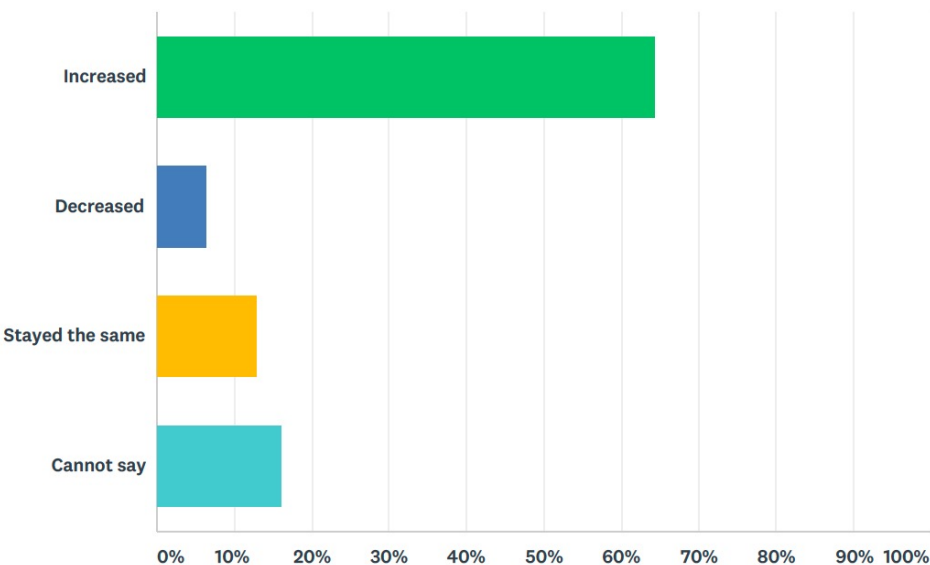
Q14 Did switching platforms increase or decrease satisfaction (i.e. employee sentiment) with your organization's program(s)?

Answered: 40 Skipped: 58



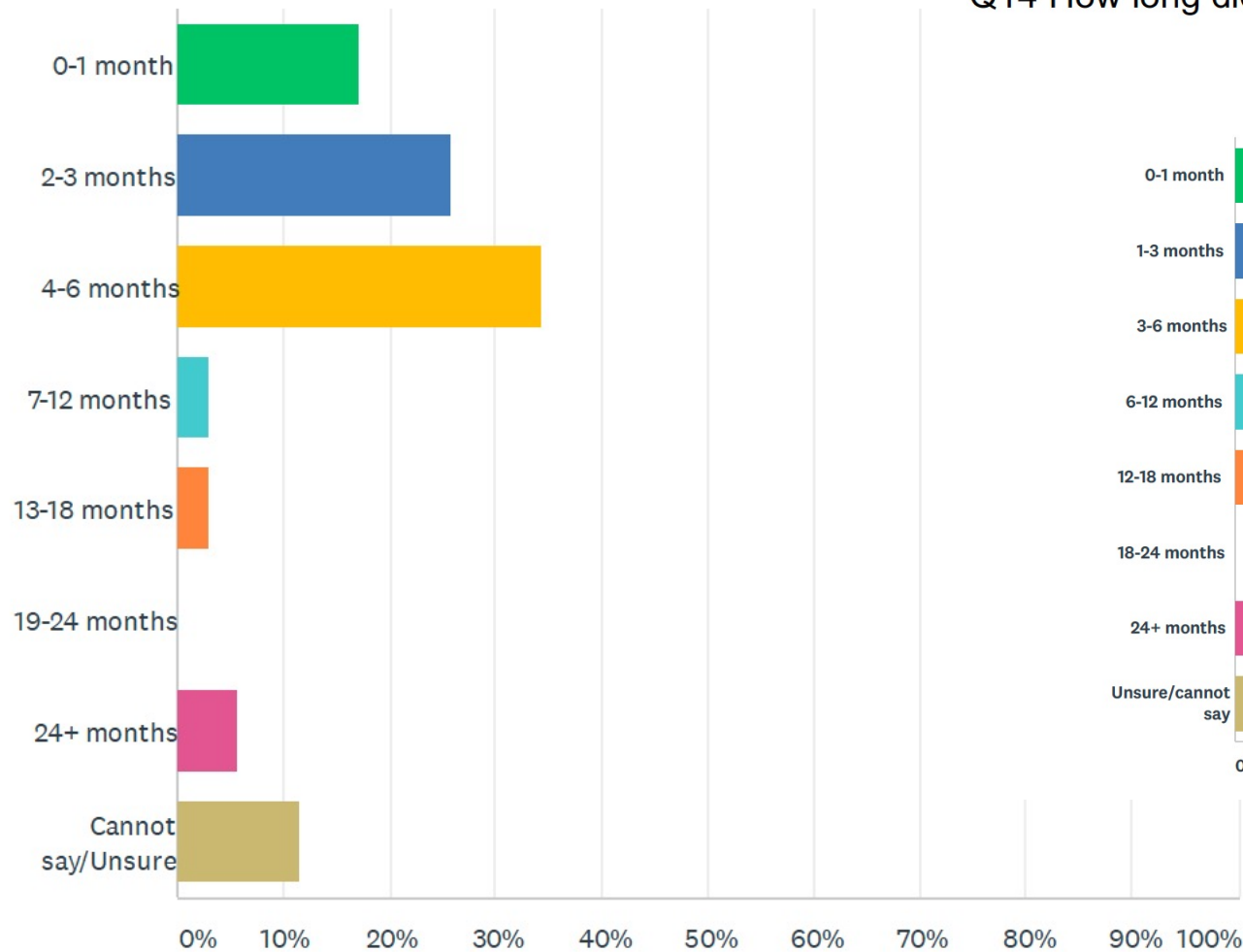
Q12 Did switching platforms increase or decrease satisfaction (i.e. employee sentiment) with your organization's program(s)?

Answered: 31 Skipped: 33



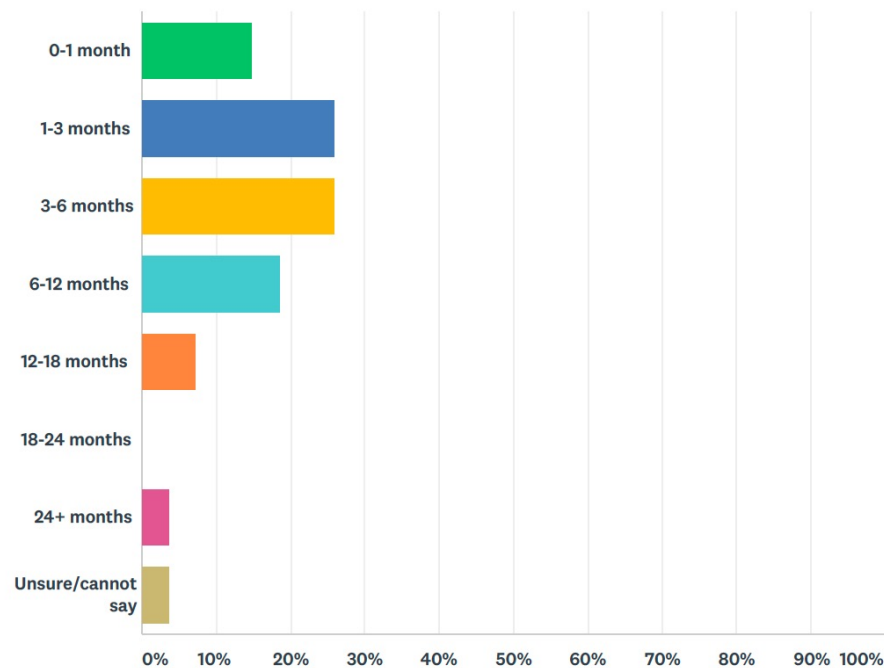
Q16 How long did it take to obtain leadership buy-in to move forward with technology selection?

Answered: 35 Skipped: 63



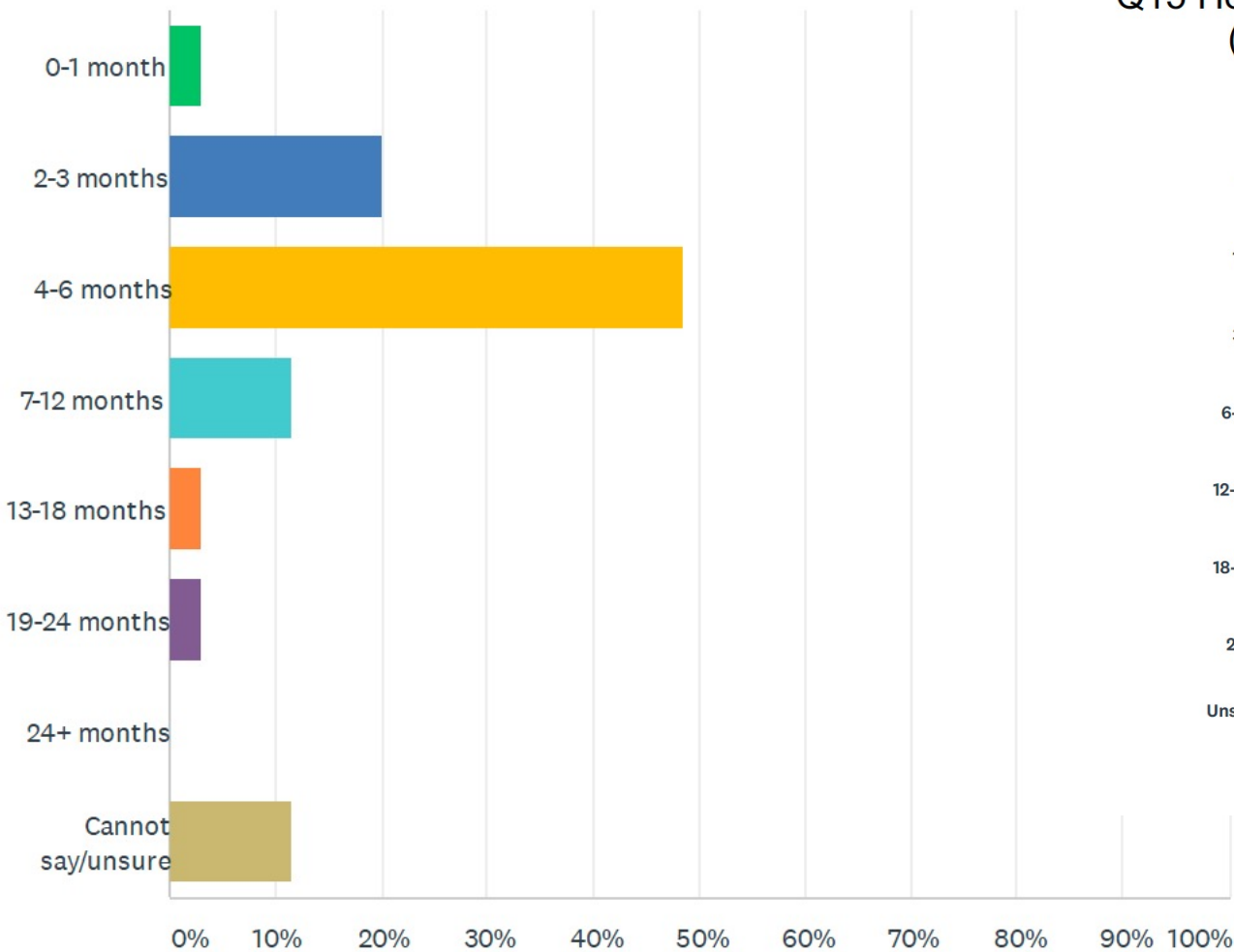
Q14 How long did it take to obtain leadership buy-in to move forward with technology selection?

Answered: 27 Skipped: 37



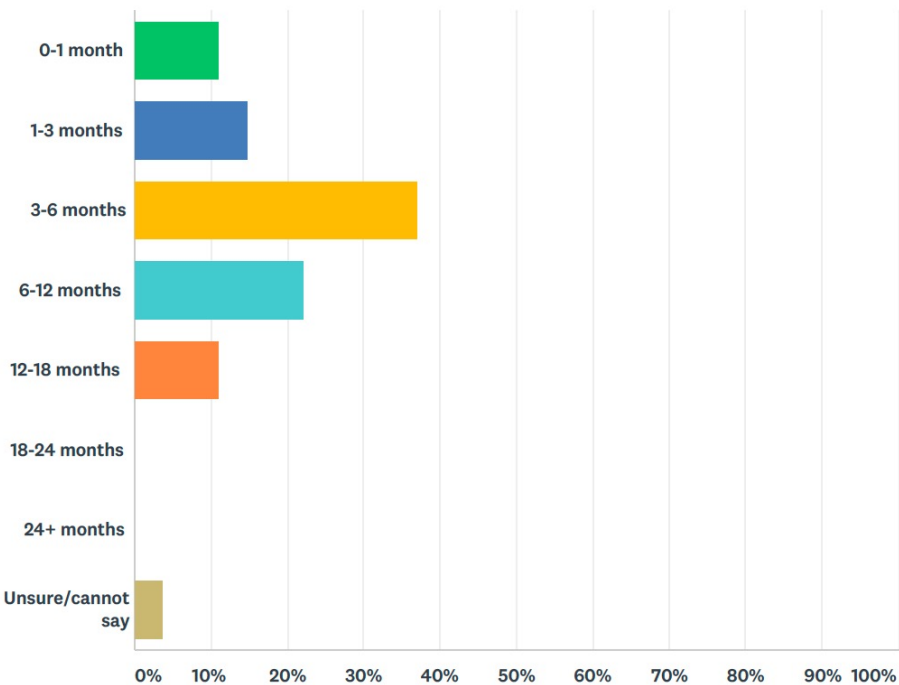
Q18 How long was the procurement process from the point of RFP (request for proposal) to signing the vendor contract?

Answered: 35 Skipped: 63



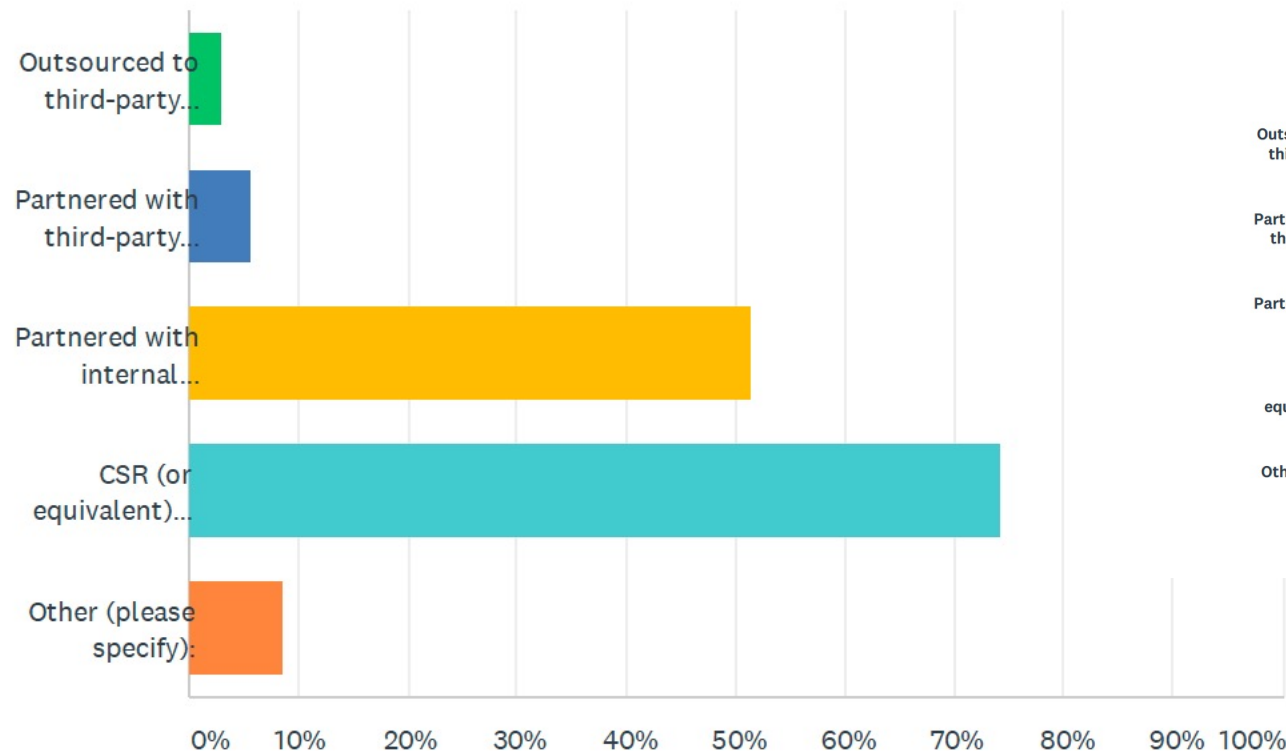
Q15 How long was the procurement process from the point of RFP (request for proposal) to signing the vendor contract?

Answered: 27 Skipped: 37



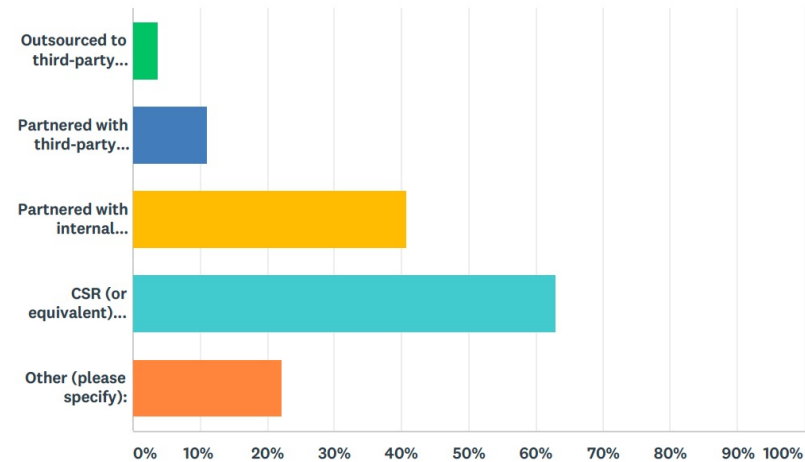
Q19 Who was involved in shortlisting platforms for evaluation? Check all that apply.

Answered: 35 Skipped: 63



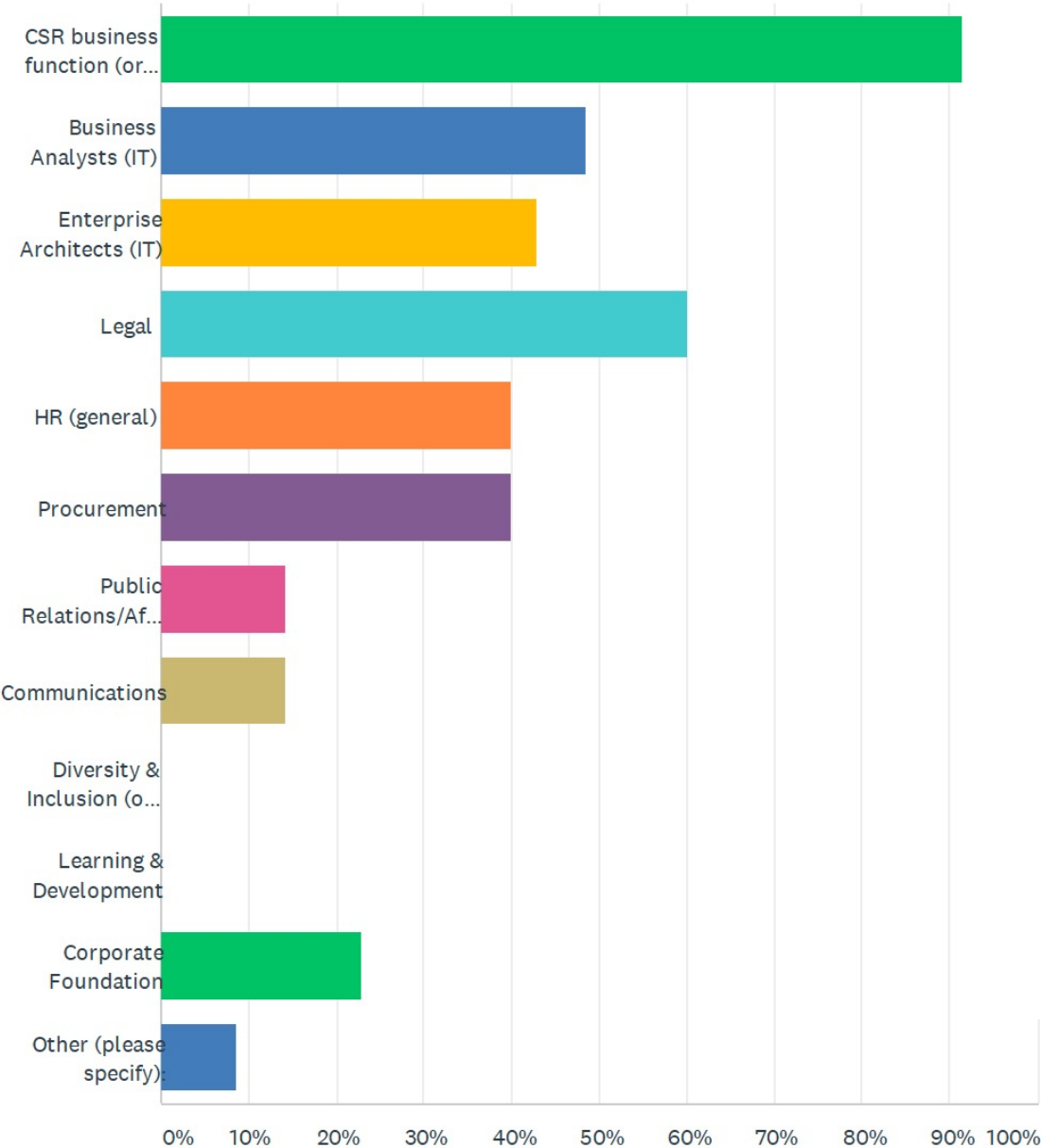
Q16 Who was involved in shortlisting platforms for evaluation? Check all that apply.

Answered: 27 Skipped: 37



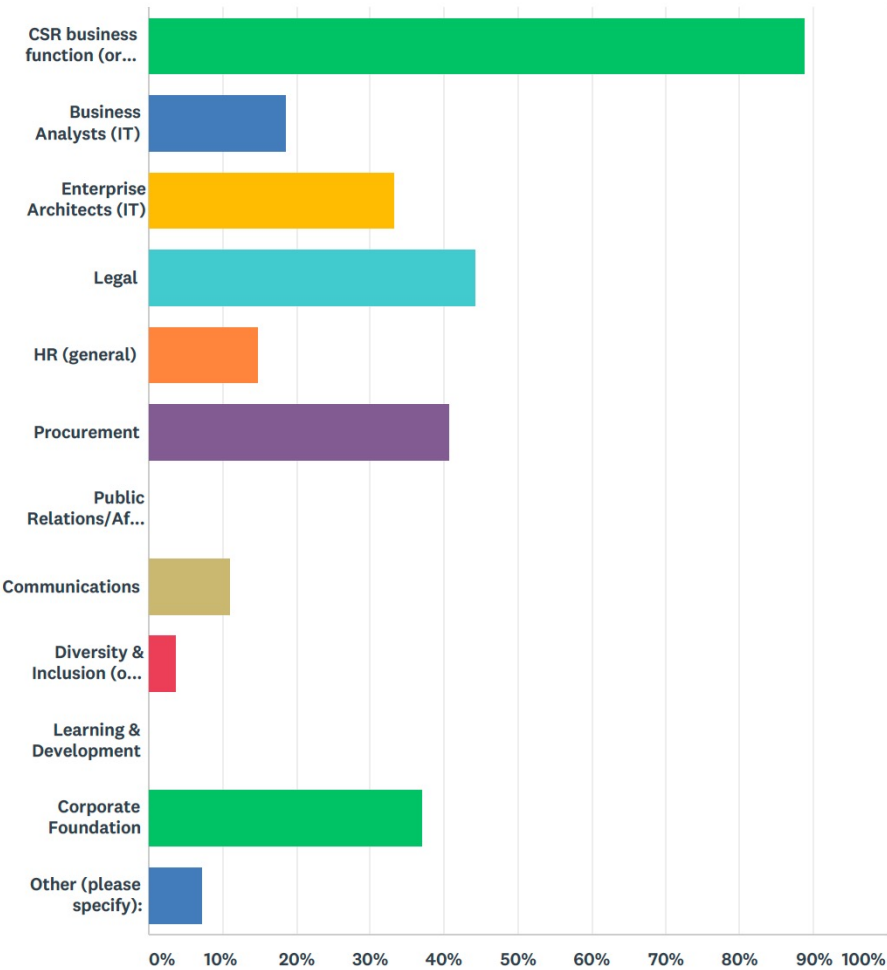
Q20 What departments were involved in the selection decision? Check all that apply.

Answered: 35 Skipped: 63



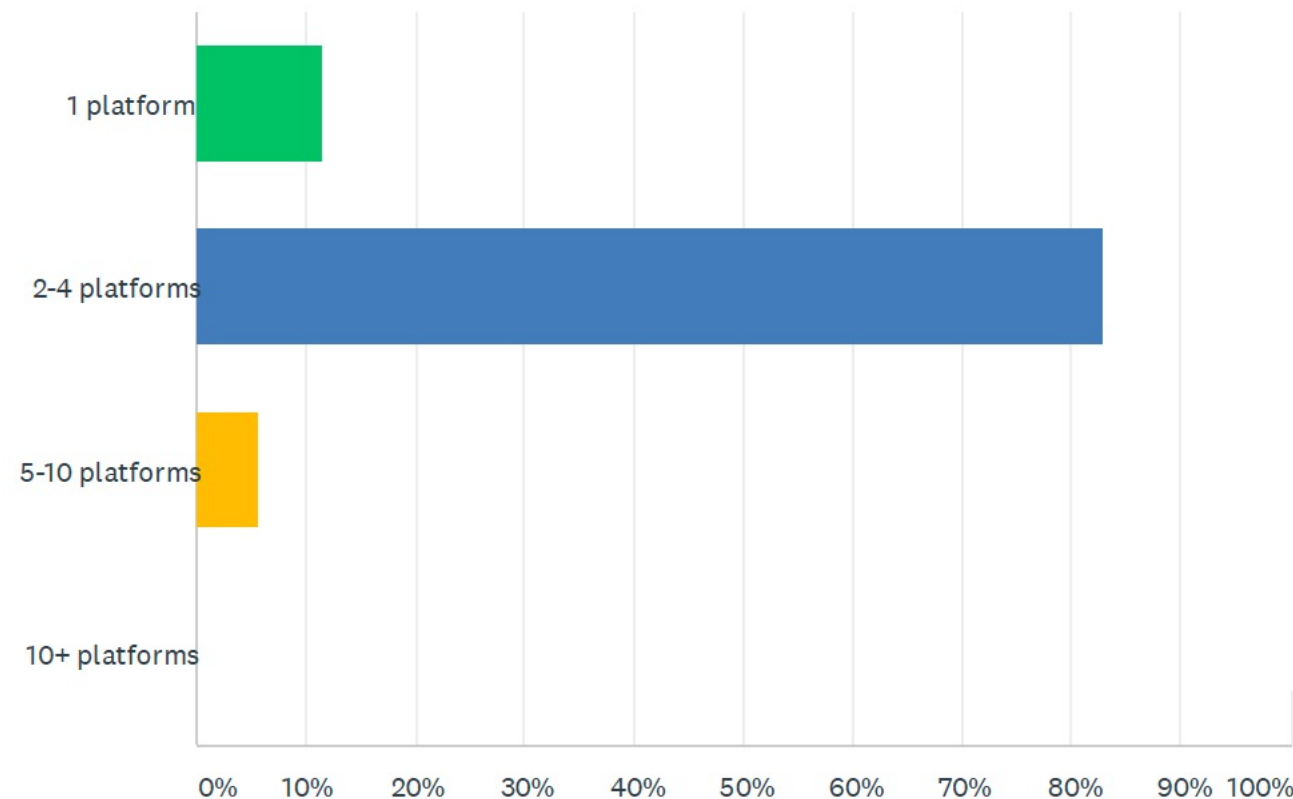
Q17 What departments were involved in the selection decision? Check all that apply.

Answered: 27 Skipped: 37



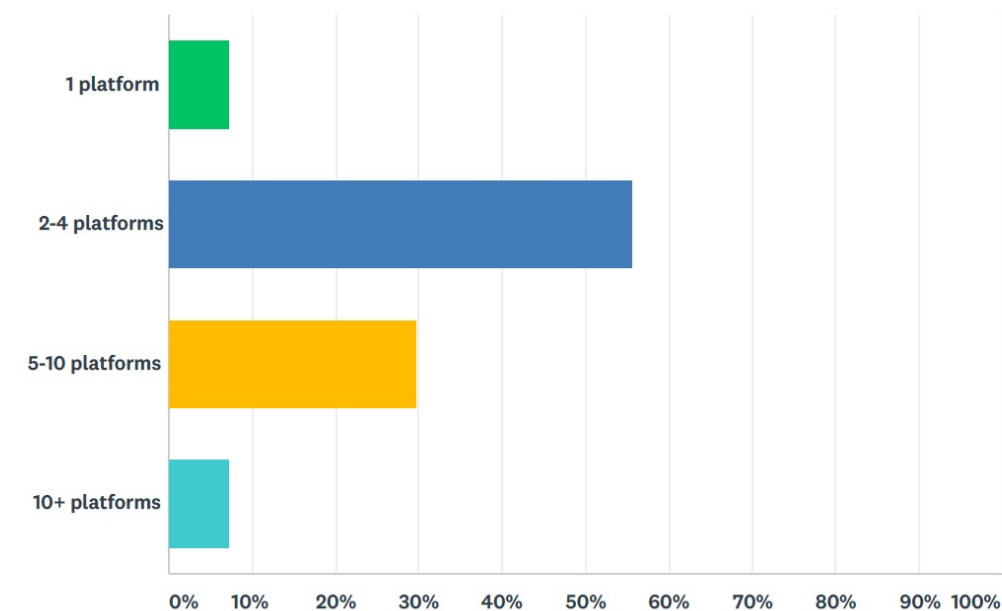
Q21 How many platforms did you compare before selection?

Answered: 35 Skipped: 63



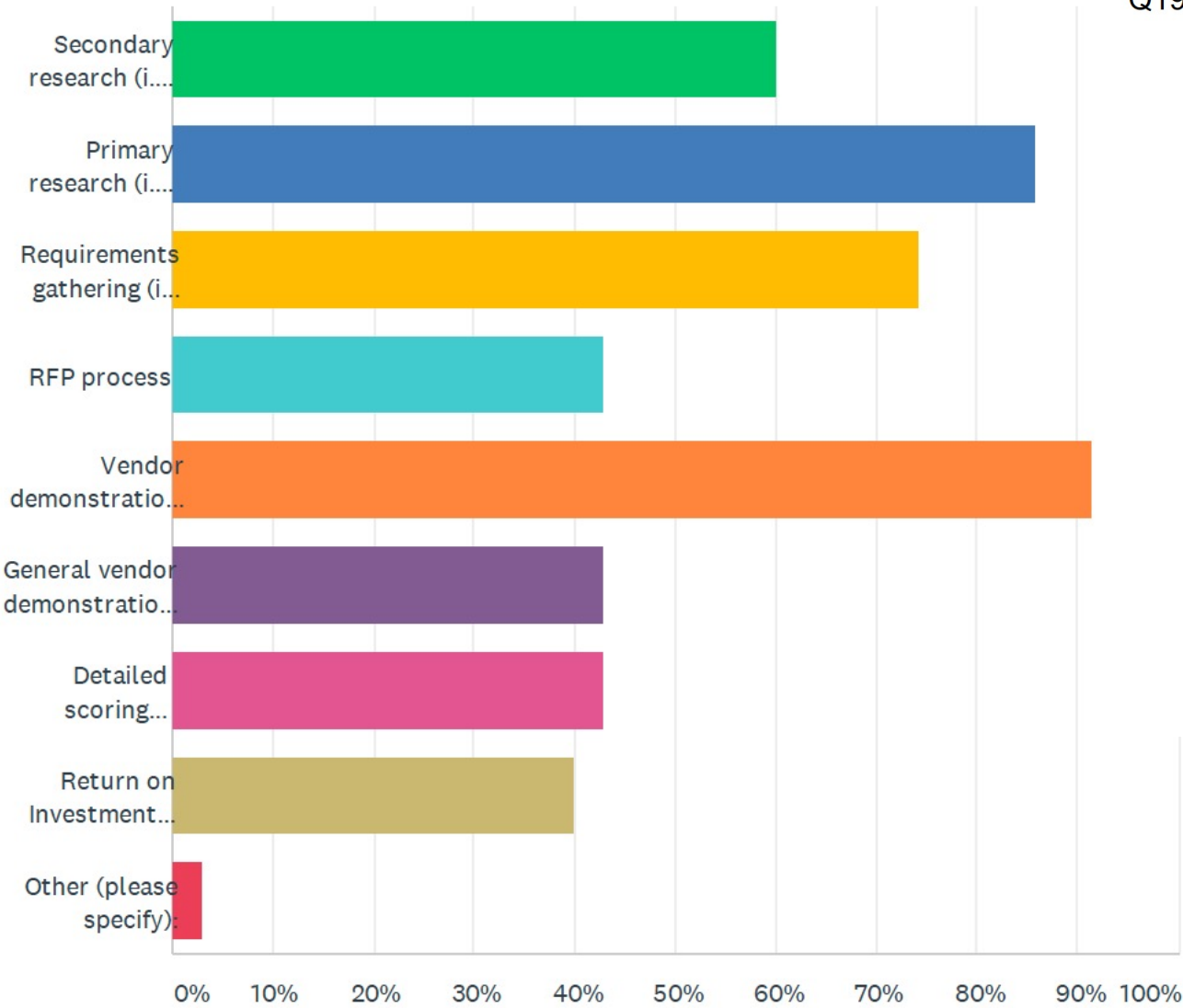
Q18 How many platforms did you compare before selection?

Answered: 27 Skipped: 37



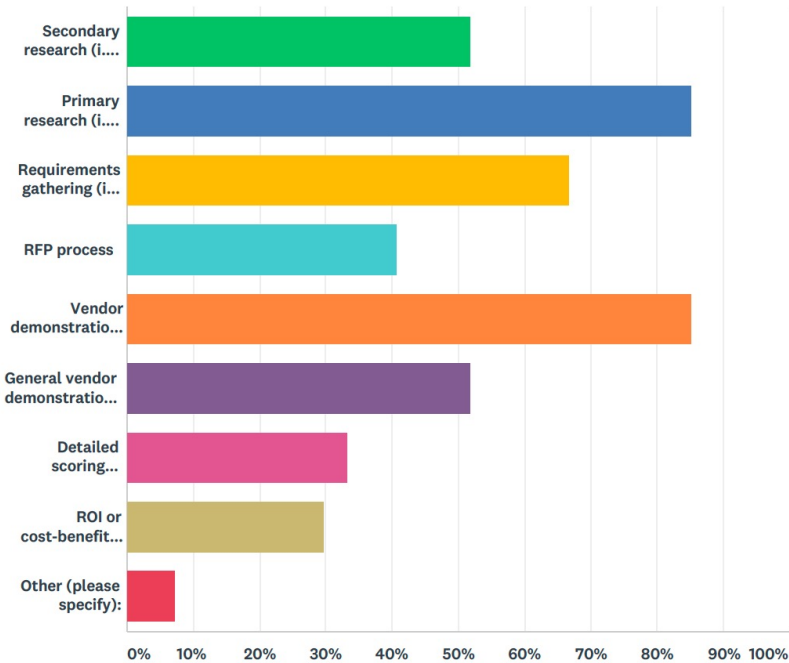
Q22 Which of the below steps, if any, did you undertake to conduct due diligence on your shortlist? Check all that apply.

Answered: 35 Skipped: 63



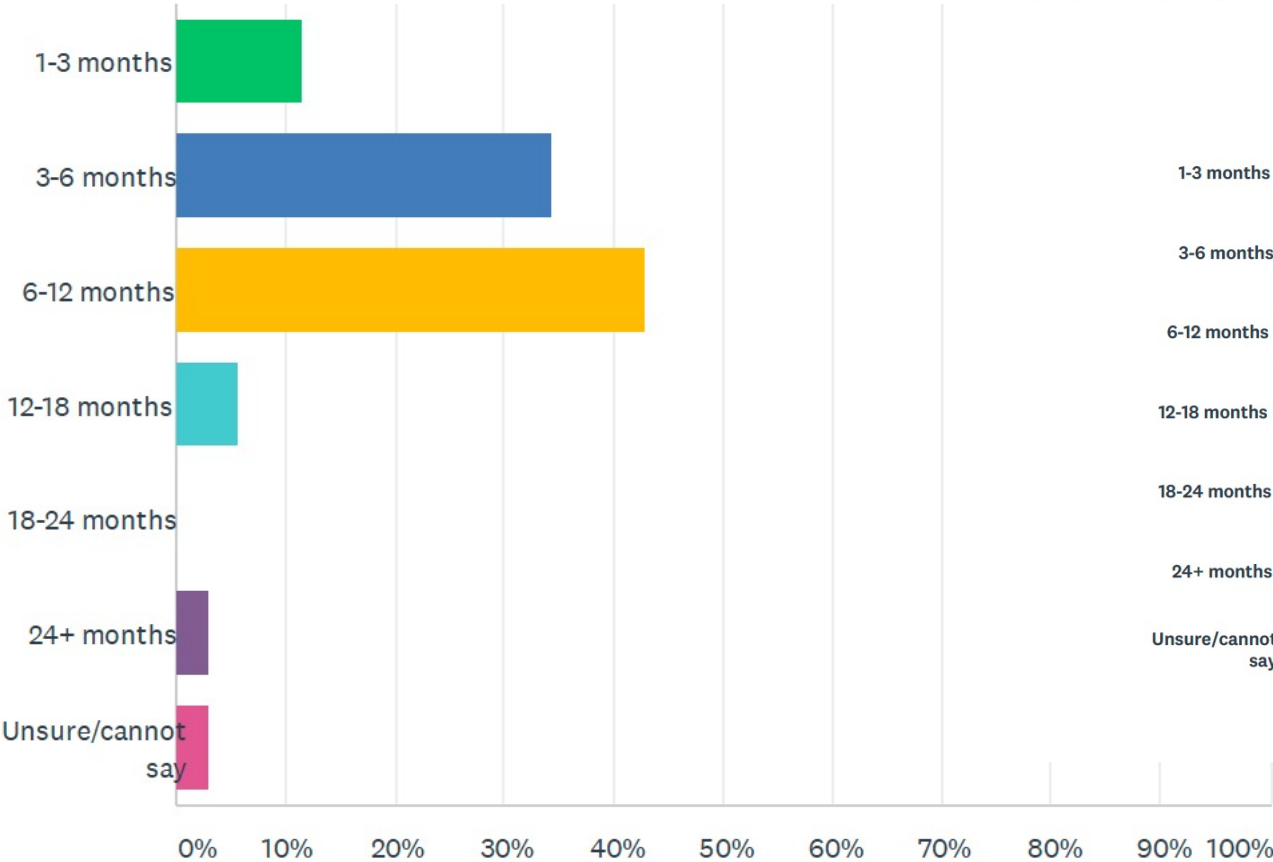
Q19 What of the below steps, if any, did you undertake to conduct due diligence on your shortlist? Check all that apply.

Answered: 27 Skipped: 37



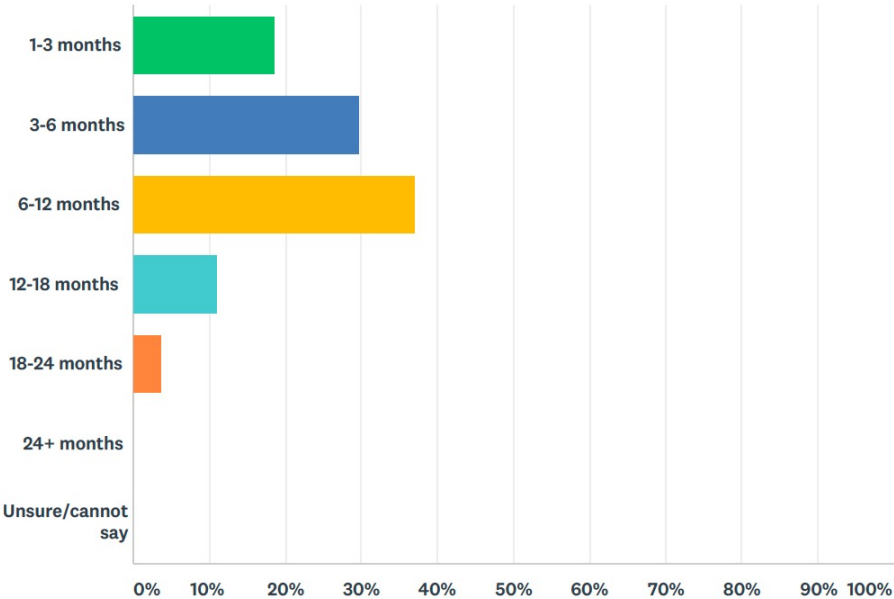
Q23 What was the total duration of time between the date of technology selection to the go-live date?

Answered: 35 Skipped: 63



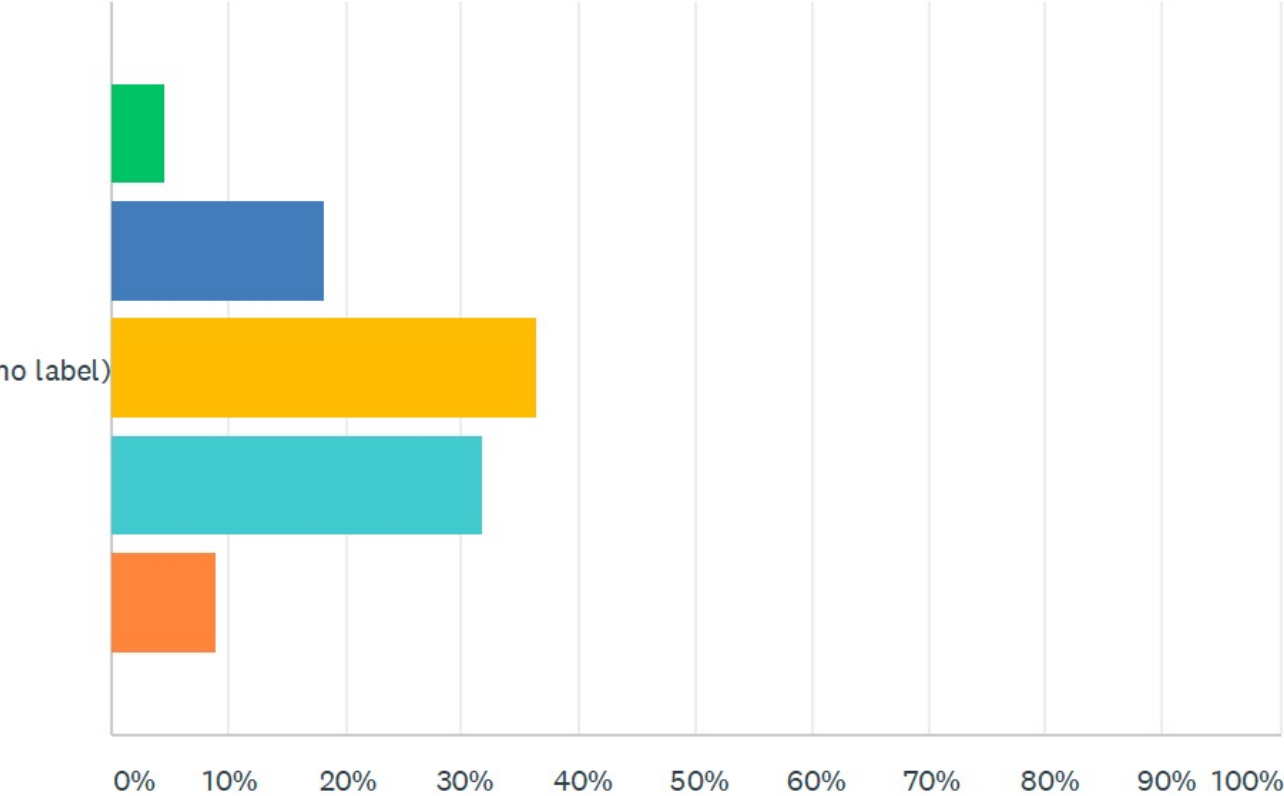
Q21 What was the total duration of time between the date of technology selection to the go-live date?

Answered: 27 Skipped: 37



Q26 How easy to implement was the platform?

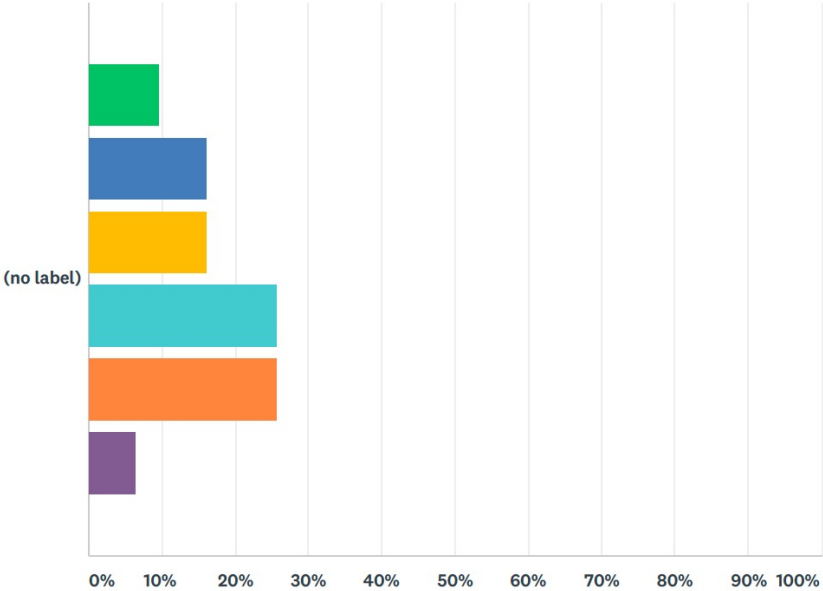
Answered: 44 Skipped: 54



Extremely Difficult Somewhat Difficult Moderate Somewhat Easy
Extremely Easy

Q24 How easy to implement was the platform?

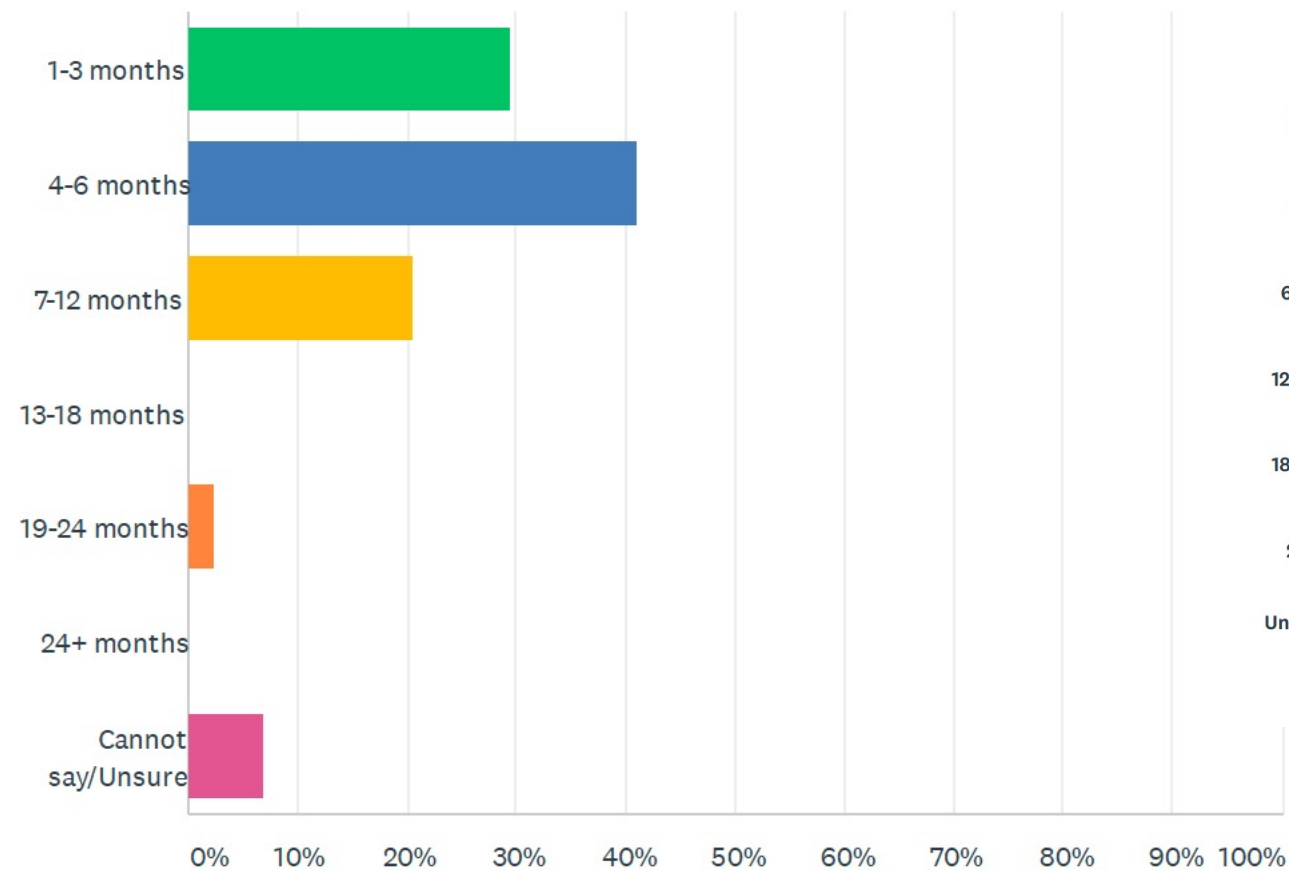
Answered: 31 Skipped: 33



Extremely Difficult Difficult Somewhat Difficult Somewhat Easy
Easy Extremely Easy

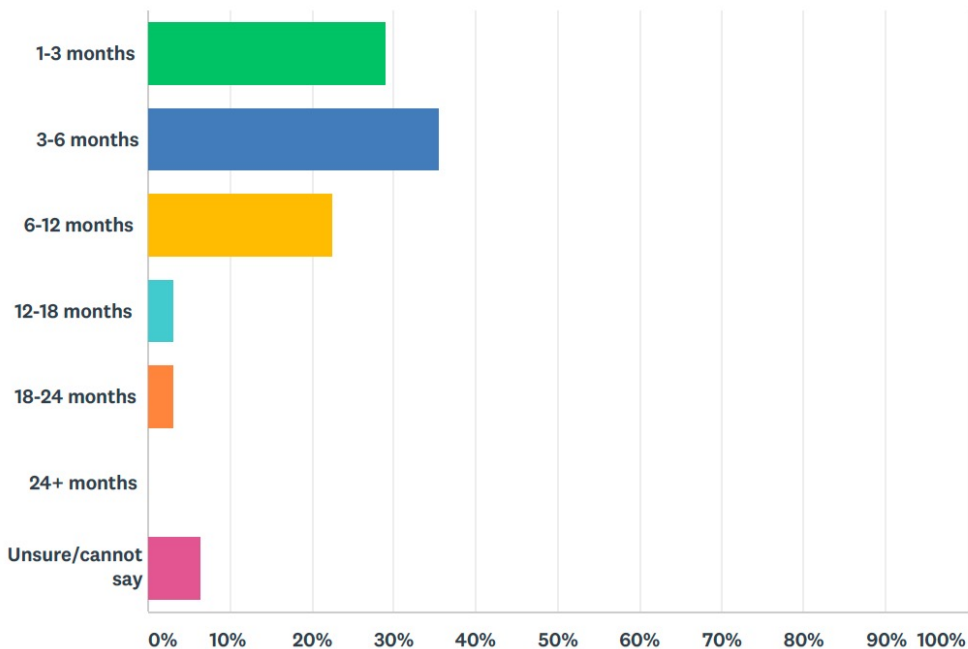
Q31 How long did it take to implement the platform?

Answered: 44 Skipped: 54



Q29 How long did it take to implement the platform?

Answered: 31 Skipped: 33





INSIGHT

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.



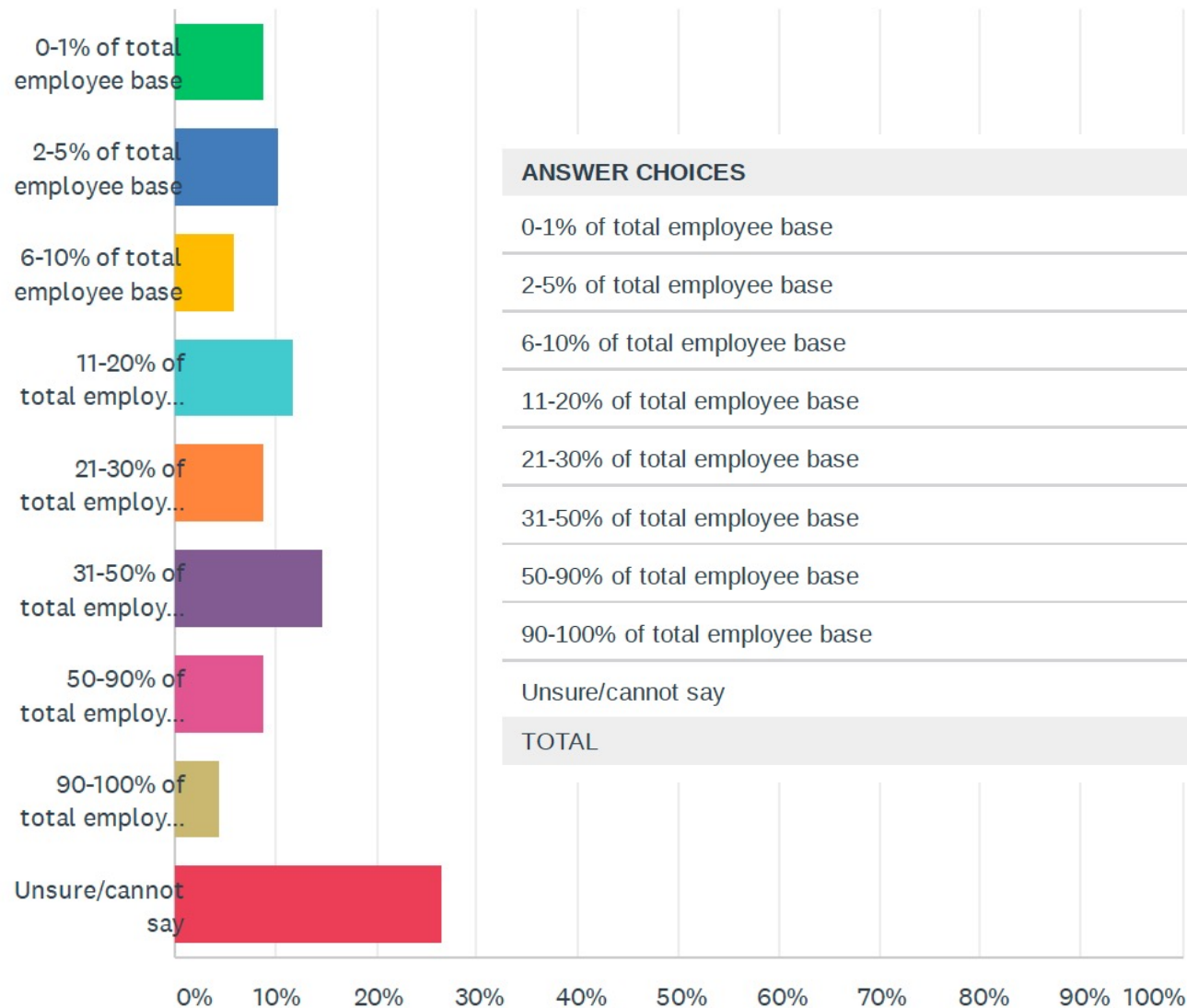
FEW PRACTITIONERS PURSUE FULLY-COSTED BUSINESS CASES, COST-BENEFIT WHEN PROCURING TOOLS



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?

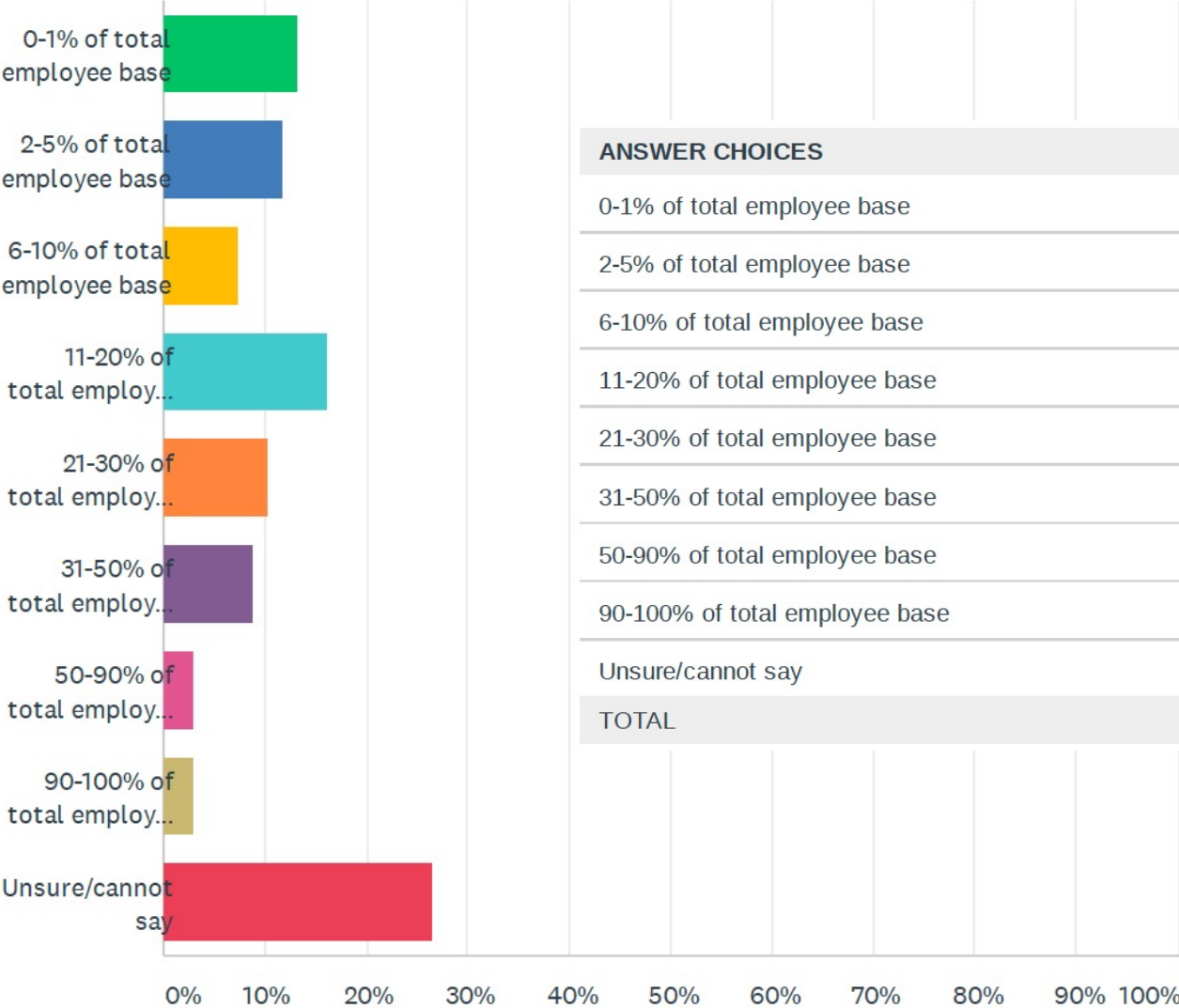
Answered: 68 Skipped: 30



ANSWER CHOICES	RESPONSES
0-1% of total employee base	8.82%6
2-5% of total employee base	10.29%7
6-10% of total employee base	5.88%4
11-20% of total employee base	11.76%8
21-30% of total employee base	8.82%6
31-50% of total employee base	14.71%10
50-90% of total employee base	8.82%6
90-100% of total employee base	4.41%3
Unsure/cannot say	26.47%18
TOTAL	68

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.)?

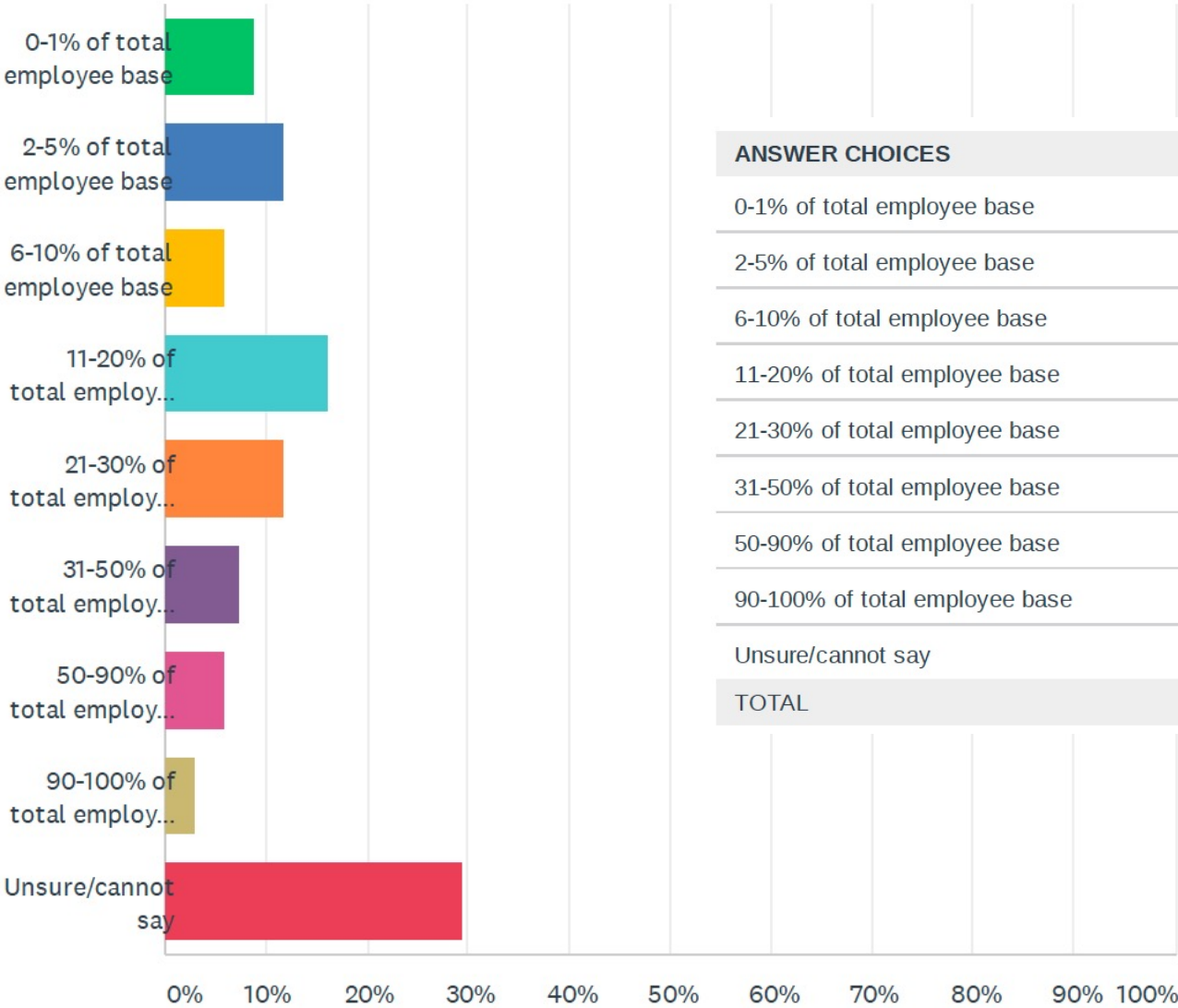
Answered: 68 Skipped: 30



ANSWER CHOICES	RESPONSES
0-1% of total employee base	13.24%9
2-5% of total employee base	11.76%8
6-10% of total employee base	7.35%5
11-20% of total employee base	16.18%11
21-30% of total employee base	10.29%7
31-50% of total employee base	8.82%6
50-90% of total employee base	2.94%2
90-100% of total employee base	2.94%2
Unsure/cannot say	26.47%18
TOTAL	68

Q49 Occasional (performs one or two transactions per year)?

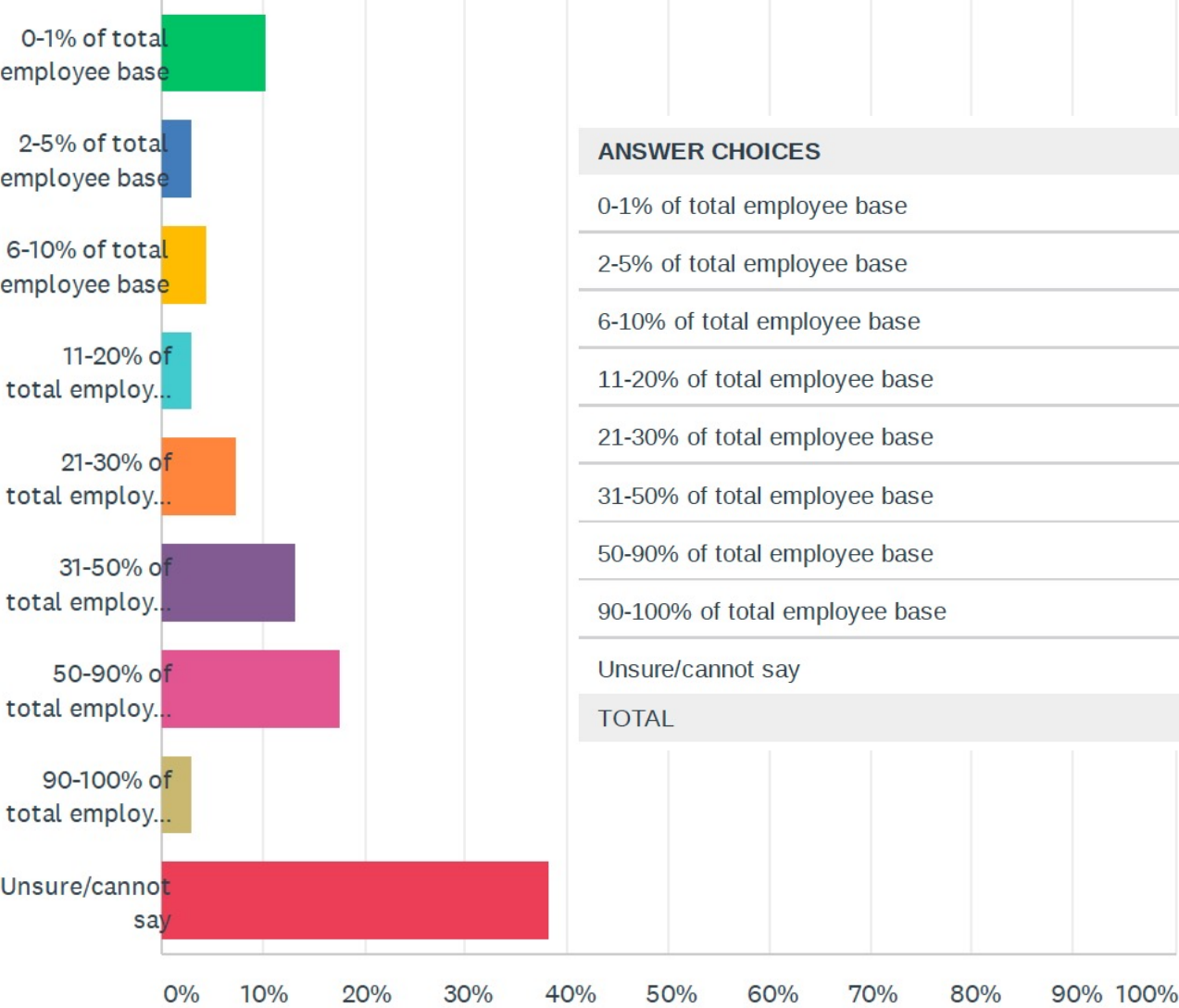
Answered: 68 Skipped: 30



ANSWER CHOICES	RESPONSES	
0-1% of total employee base	8.82%	6
2-5% of total employee base	11.76%	8
6-10% of total employee base	5.88%	4
11-20% of total employee base	16.18%	11
21-30% of total employee base	11.76%	8
31-50% of total employee base	7.35%	5
50-90% of total employee base	5.88%	4
90-100% of total employee base	2.94%	2
Unsure/cannot say	29.41%	20
TOTAL		68

Q50 Dormant (performs no transactions; never activated/logged in)?

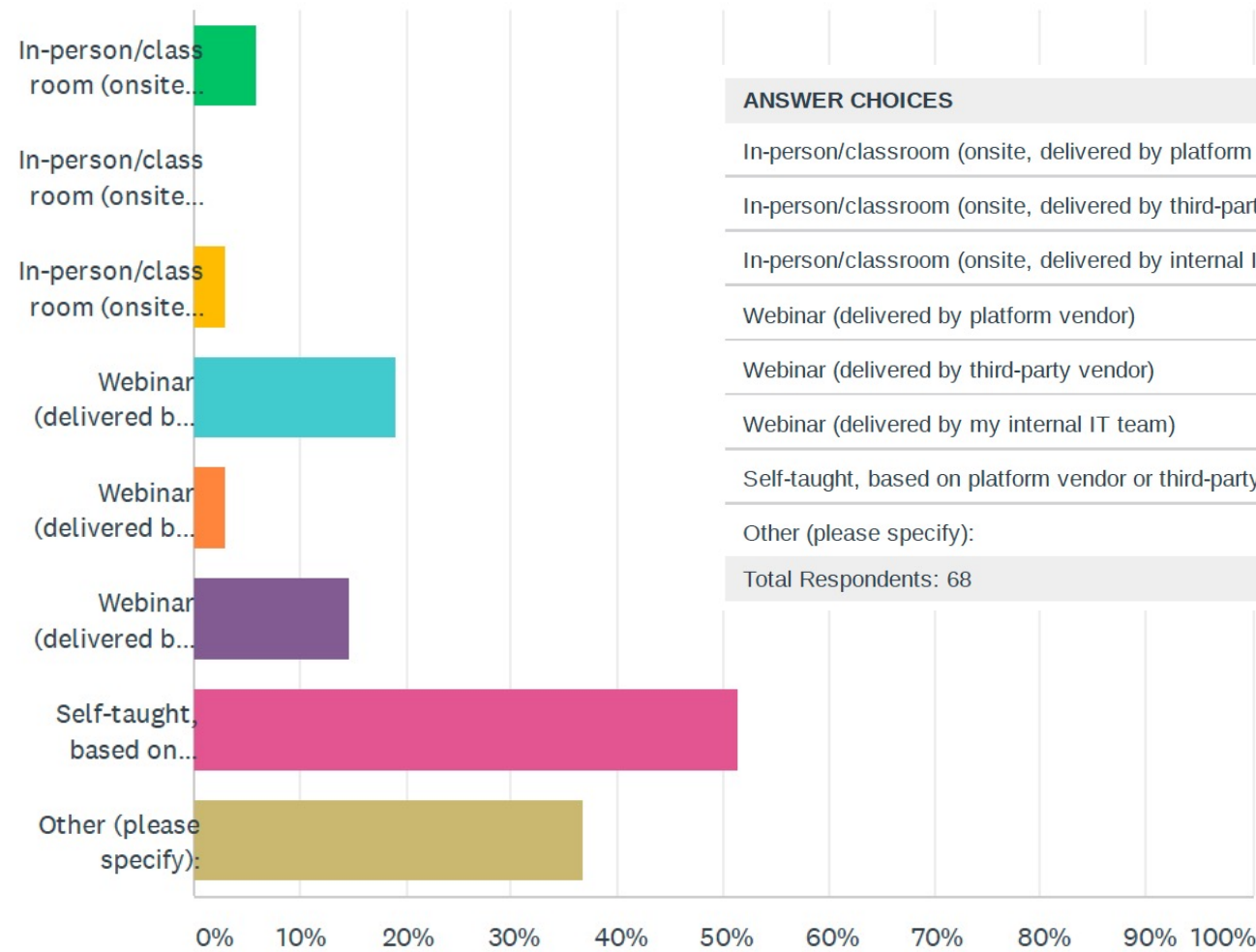
Answered: 68 Skipped: 30



ANSWER CHOICES	RESPONSES
0-1% of total employee base	10.29%7
2-5% of total employee base	2.94%2
6-10% of total employee base	4.41%3
11-20% of total employee base	2.94%2
21-30% of total employee base	7.35%5
31-50% of total employee base	13.24%9
50-90% of total employee base	17.65%12
90-100% of total employee base	2.94%2
Unsure/cannot say	38.24%26
TOTAL	68

Q51 How were end-users trained on the new platform? Check all that apply.

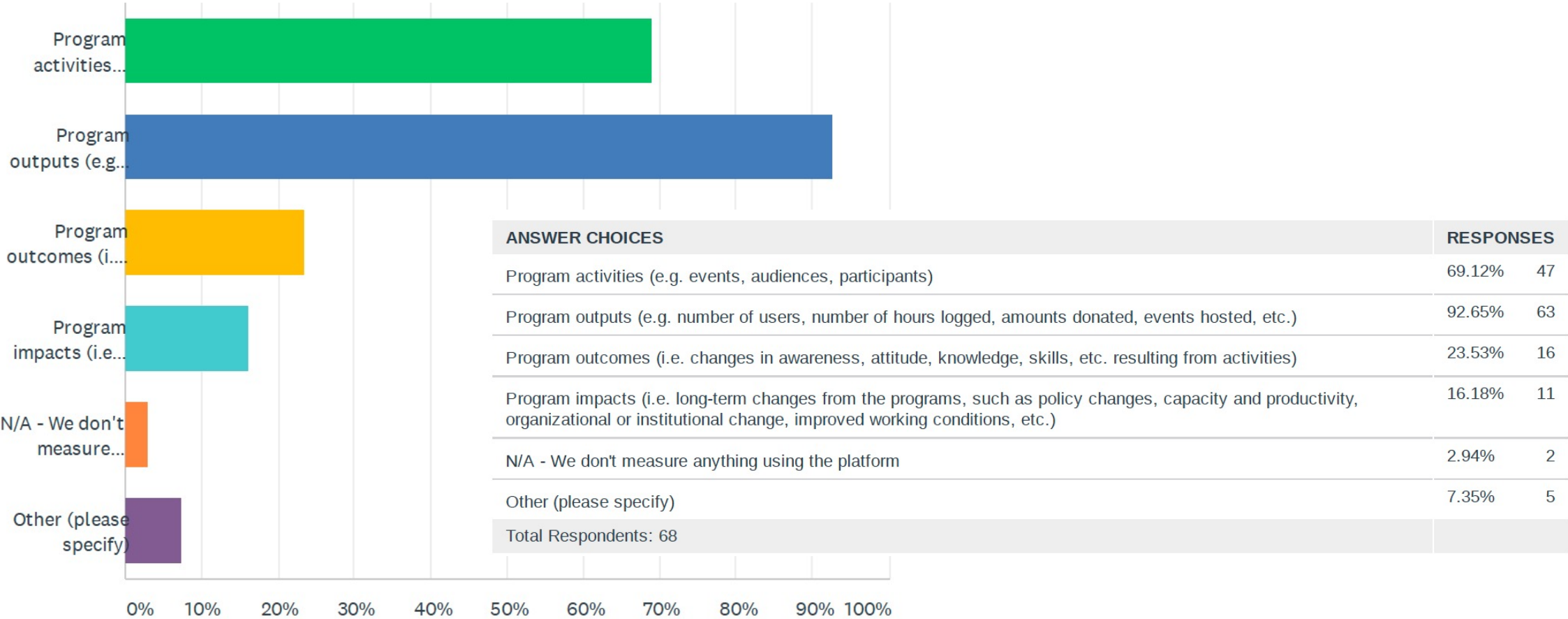
Answered: 68 Skipped: 30



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		

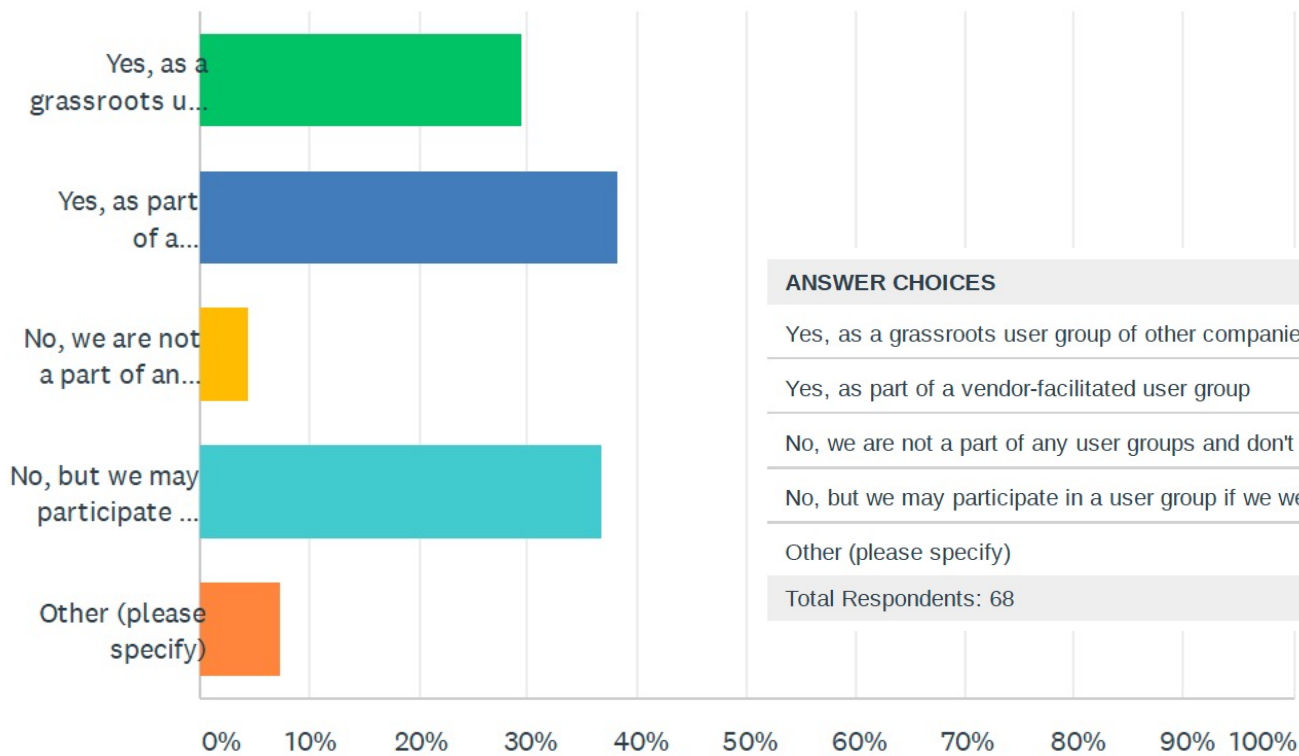
Q63 What results or metrics do you measure using the platform?

Answered: 68 Skipped: 30



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	RESPONSES	
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		



INSIGHT

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.



EMPLOYEES CHOOSE CAUSES BASED ON PERSONAL INTERESTS AND VALUES

The background is a dark blue gradient. Overlaid on it is a faint, stylized world map composed of a grid of small dots. Various colored circles (red, yellow, blue, purple) are scattered across the map, some connected by thin vertical lines, suggesting data points or global connectivity. The overall aesthetic is technological and data-driven.

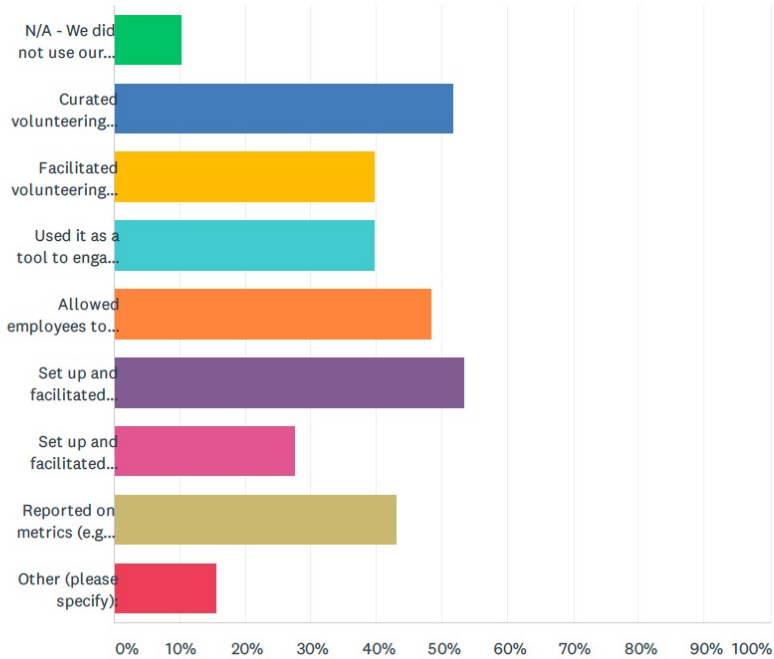
COVID-19 AND SOCIAL JUSTICE ISSUES IN 2020

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.

Answered: 58 Skipped: 26



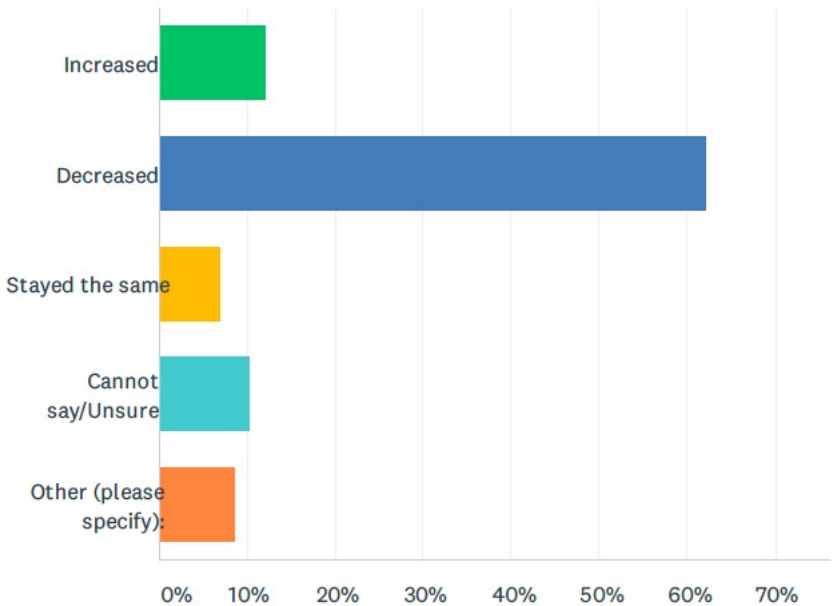
ANSWER CHOICES	RESPONSES	
N/A - We did not use our platform to help facilitate COVID-19 response	10.34%	6
Curated volunteering opportunities	51.72%	30
Facilitated volunteering events	39.66%	23
Used it as a tool to engage employees while out of the office	39.66%	23
Allowed employees to find and create volunteering events	48.28%	28
Set up and facilitated employee giving campaigns (e.g. matching gifts)	53.45%	31
Set up and facilitated grants campaigns (e.g. dollars for doers)	27.59%	16
Reported on metrics (e.g. hours and dollars)	43.10%	25
Other (please specify):	15.52%	9
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?

Answered: 58 Skipped: 26

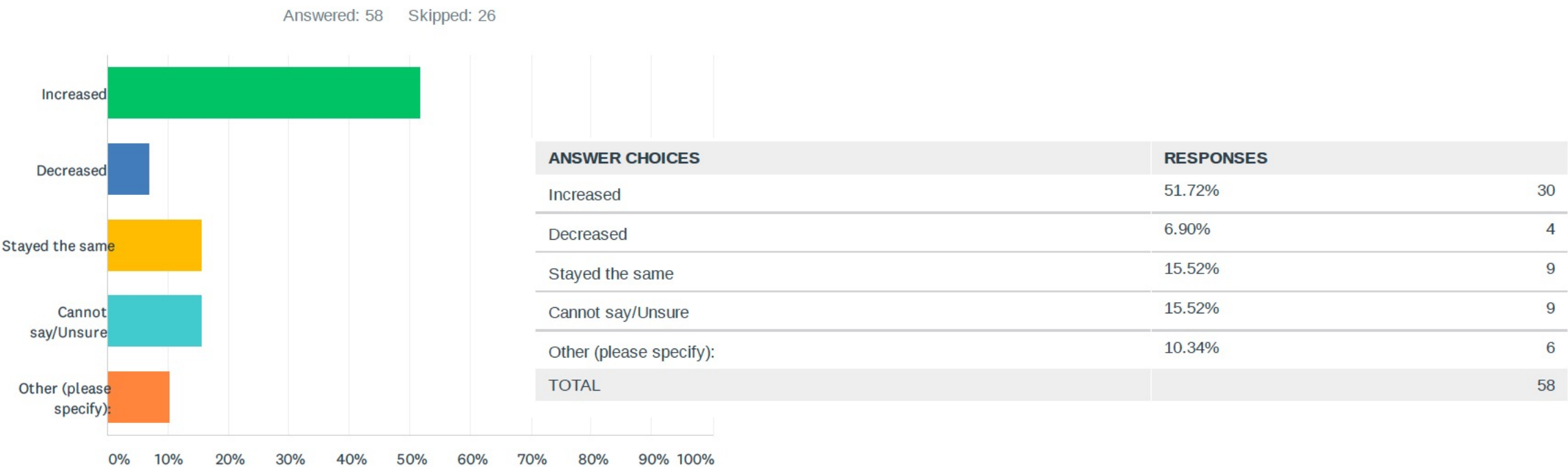


ANSWER CHOICES	RESPONSES	
Increased	12.07%	7
Decreased	62.07%	36
Stayed the same	6.90%	4
Cannot say/Unsure	10.34%	6
Other (please specify):	8.62%	5
TOTAL		58

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

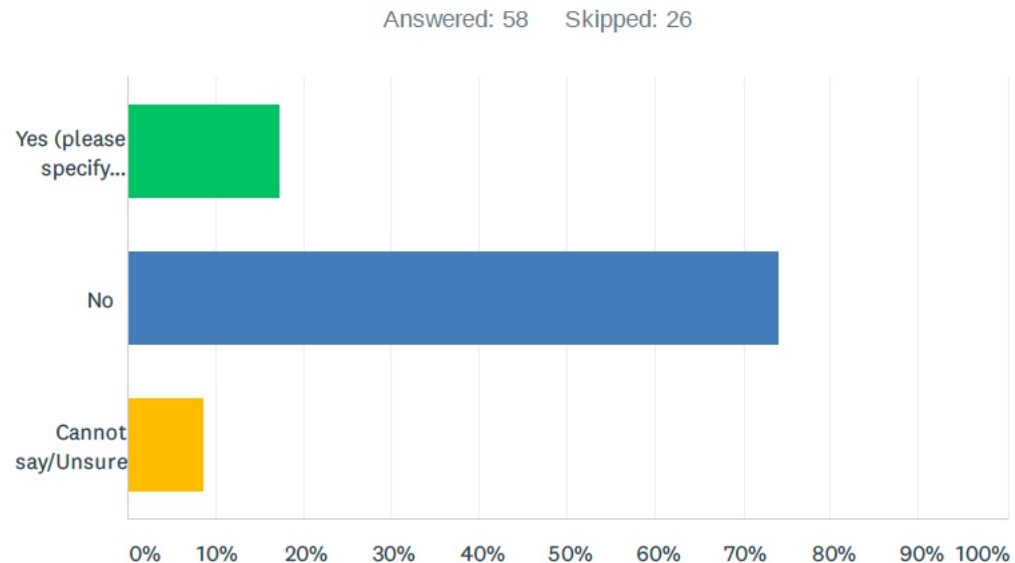
Q69 From your perspective, how did COVID-19 impact the level of giving activity on your company's platform?



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 platfrom with native virtual volunteering capabilities)?

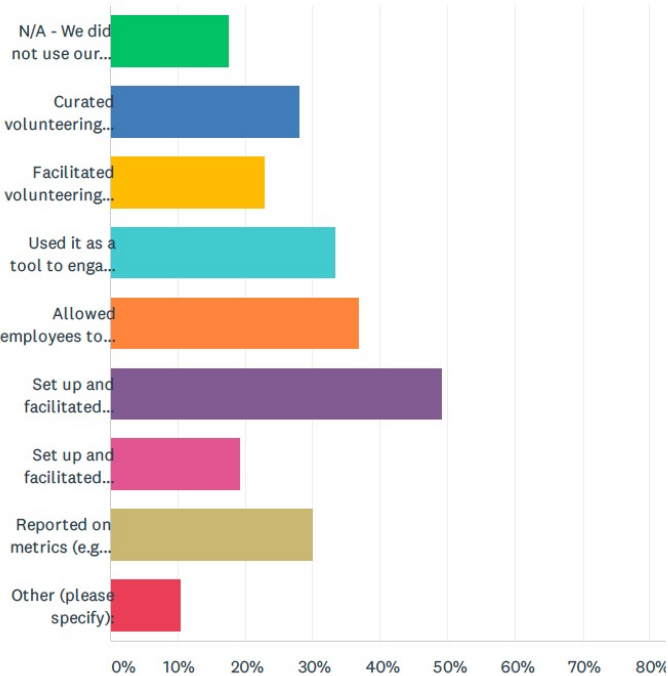


Initial Analysis

- **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.

Answered: 57 Skipped: 27

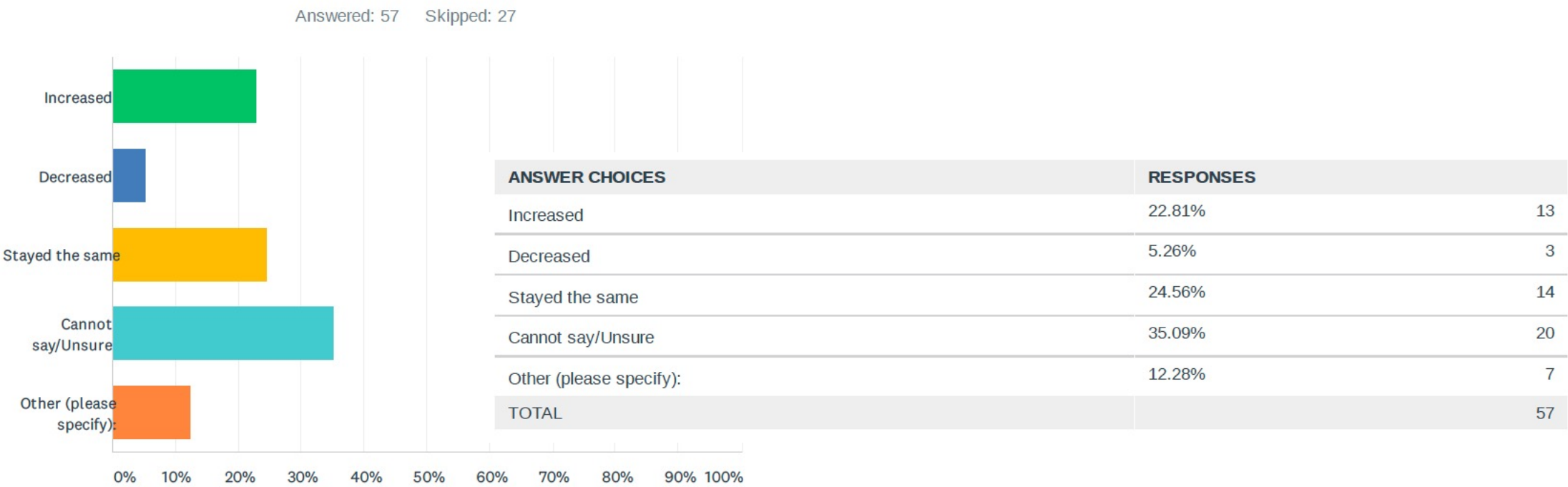


ANSWER CHOICES	RESPONSES	
N/A - We did not use our platform to help facilitate COVID-19 response	17.54%	10
Curated volunteering opportunities	28.07%	16
Facilitated volunteering events	22.81%	13
Used it as a tool to engage employees while out of the office	33.33%	19
Allowed employees to find and create volunteering events	36.84%	21
Set up and facilitated employee giving campaigns (e.g. matching gifts)	49.12%	28
Set up and facilitated grants campaigns (e.g. dollars for doers)	19.30%	11
Reported on metrics (e.g. hours and dollars)	29.82%	17
Other (please specify):	10.53%	6
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

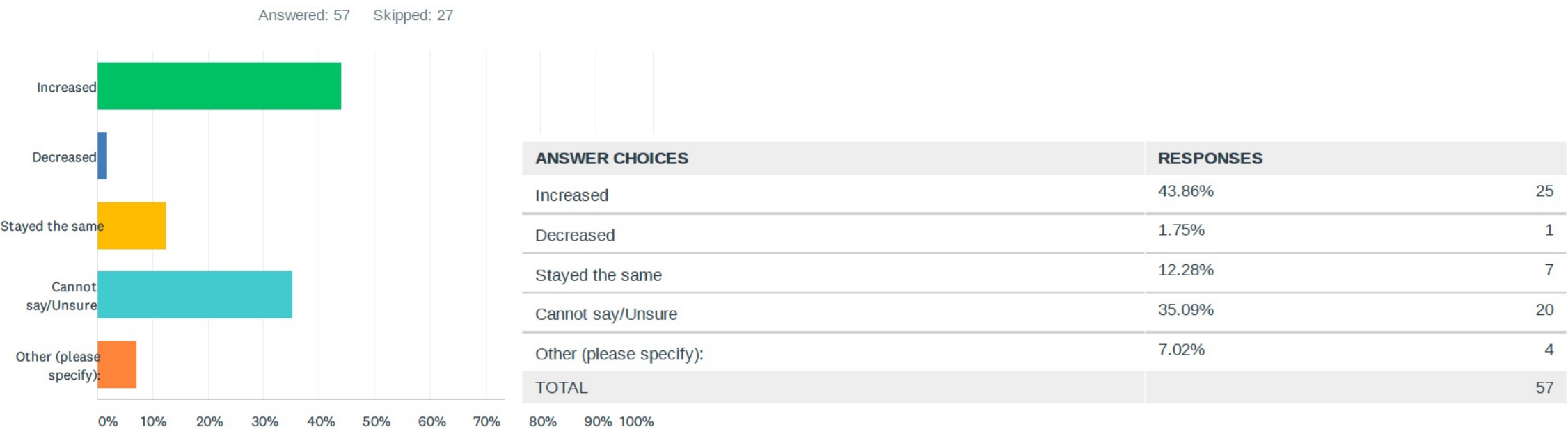
Q75 From your perspective, how did events of social unrest impact the level of volunteering activity on your company's platform?



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

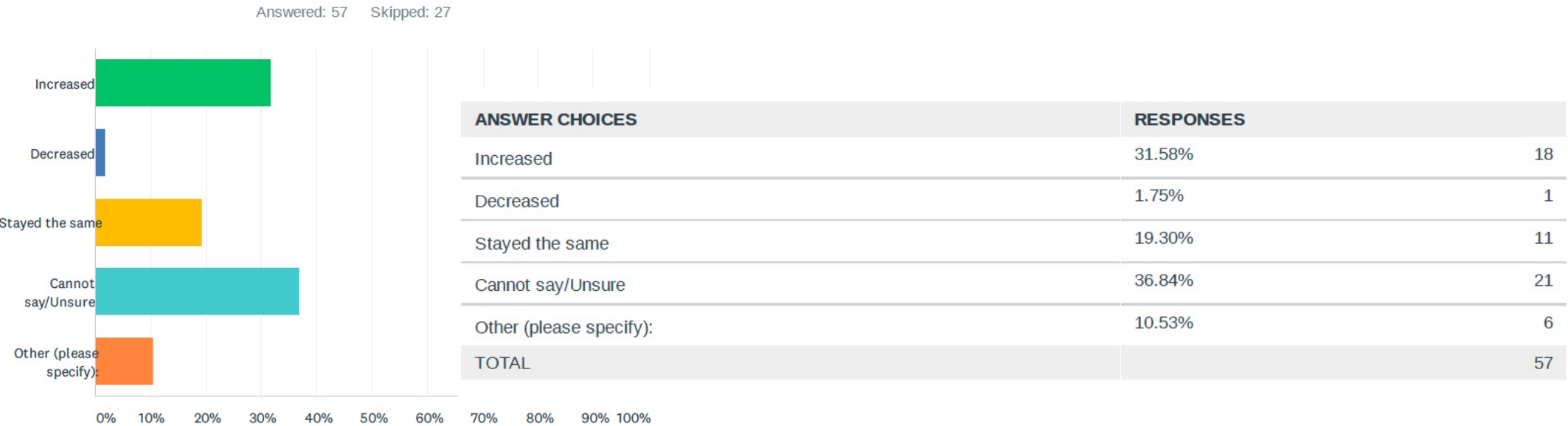
Q76 From your perspective, how did events of social unrest impact the level of giving activity on your company's platform?



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?



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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.

Tech Review coming – July 2021



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More information



Deviré Robinson, JD

VP, Philanthropic Advancement

Drobinson@fftc.org

704-973-4511



Julie Caldwell

Nat'l Marketing & Partnerships Director

Jcaldwell@e4erelief.org

704-973-4539

