CSR Software Buyer's Guide

Use this guide to help gather key information and requirements from your stakeholders to make an informed decision when selecting a software solution.

Whether you're looking for a CSR platform for the first time or considering switching vendors, this guide provides a step-by-step approach to conducting your vendor evaluation process. CSR leaders can use this guide to match their program's unique needs and goals to the right software solution.

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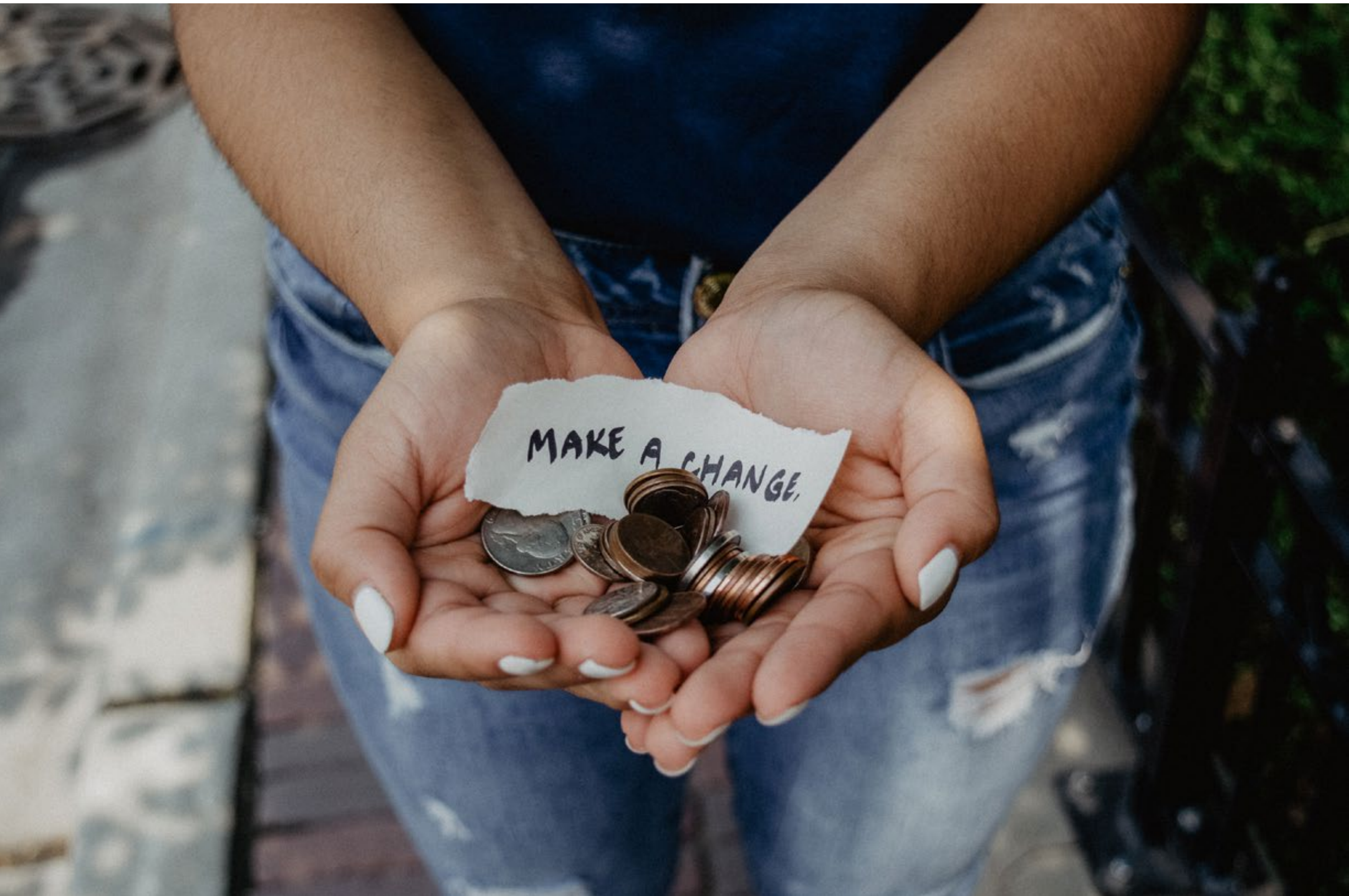


Assembling Stakeholders

Before you really start to map out your vision for a CSR platform provider, you need to first map out your internal stakeholders. When it comes to implementing an employee-facing software solution, there can be a lot of internal requirements to consider.

TIPS FOR ASSEMBLING STAKEHOLDERS

- Phone a friend. Find someone internally who you know has navigated the purchase process for software at your organization before. They can share their experience on what steps you might need to take.
- Start the process of identifying all internal stakeholders early in order to avoid delays when trying to contract and implement your new solution.
- Stay aligned throughout the process. Once you've identified your stakeholders, make sure to keep them in the loop.

SUGGESTED STAKEHOLDERS TO CONSULT WITH

IT and Security

This category includes both Security and IT teams. When it comes to purchasing software, these teams need to be part of your decision process from the start. You'll want to find out if they have certain requirements that must happen within the buying process, like security reviews. We've seen it happen time and time again that when technical resources aren't informed until the end of the buying process, delays can pop up in the form of last-minute security reviews. They will also be able to help guide you in making the right decision by ensuring the platforms you're evaluating meet basic data privacy standards, like GDPR.

Finance

Are you considering any type of employee or corporate giving as part of your platform requirements? If so, you'll definitely want to bring in the right folks from your finance team. Disbursing donations comes with a lot of red tape, and rightfully so. Your friends in finance can help identify any red flags with vendors' disbursement processes and make sure that all of the nuances that come with handling charitable transactions are considered.

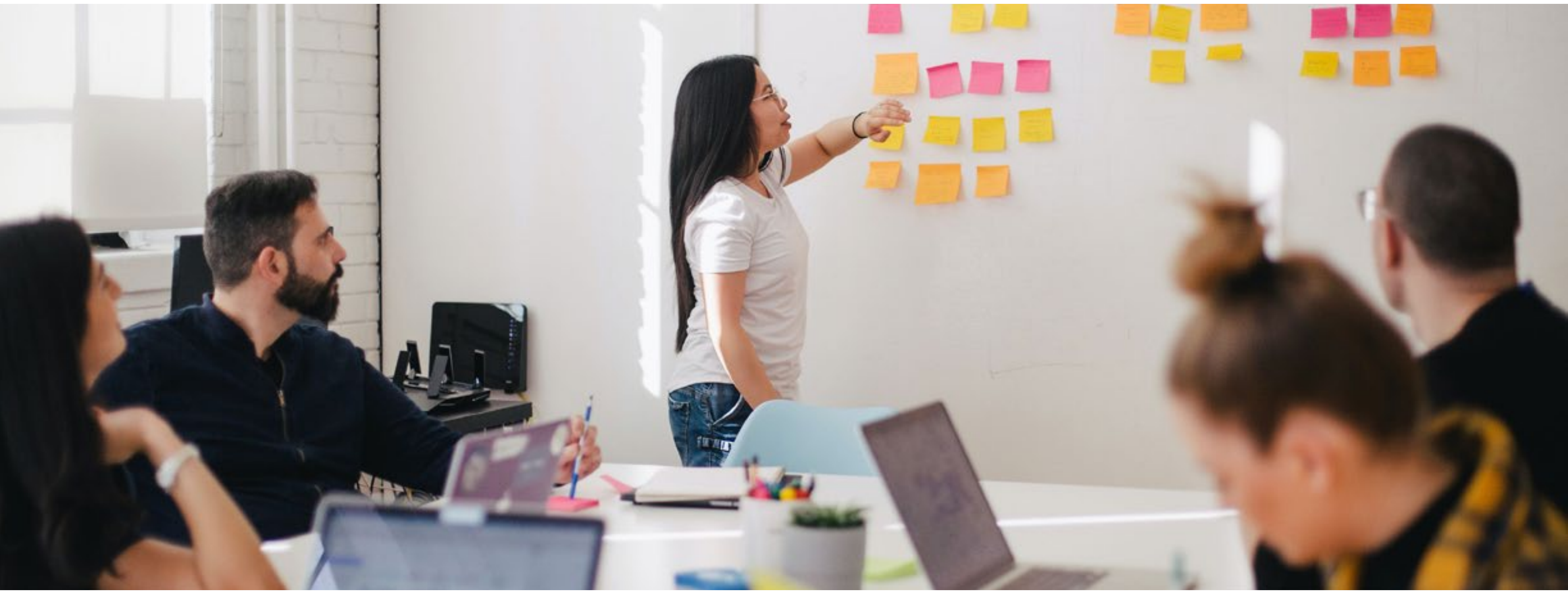
People and Culture

We know that not all companies have a formalized CSR department in place, and that some of you reading this guide might even fall into this category! Consulting with peers who lead employee engagement efforts at your organization creates a formula for success when it comes to purchasing a CSR solution. This can include Diversity and Inclusion teams, Communications, and Human Resources. They can help you identify synergies between some of their programs and the CSR platforms you're exploring. Aligning your engagement goals across these teams can help you gain internal buy-in and advocates for purchasing a platform.

You may also consider forming an internal employee focus group to hear from employees at all levels of the organization to get insights that can help shape your goals and requirements for the platform. No matter what, you'll want to ensure that someone from your HR/HRIS team is involved if you're exploring any type or CSR solution. They are an important stakeholder when it comes to managing employee data.

Marketing, Communications and Brand

CSR has been shown to have numerous positive impacts on a company's brand. Involving Marketing and Brand in your process will be helpful in identifying platform solutions that can help align with your brand and tell the story of the impact you're making in the community. Many platforms in the market are white-labeled, and can be configured to really reflect your brand's image. Your Marketing & Brand friends can help you design the platform during the implementation phase.



Gathering Requirements

The time you take to engage thoughtfully in the requirement-gathering process can be the difference between choosing a software solution that moves your programs forward or one that holds them back.

TIPS FOR GATHERING INPUT FROM STAKEHOLDERS

- Define current processes and current pain points or challenges you are facing
- Understand your stakeholder's ideal world and prioritize their wish list
- Tie back to your program goals

MAKE A LIST

Once your organization thinks through the answers to the questions, you should have a guide that can navigate your evaluation of CSR software. Your requirements should reflect a holistic view of your social impact programs as they relate to internal and external stakeholder's needs.

Functional Requirements

Put together an overview of your current programs including the parameters and policies. How do you currently engage your employees? Do you run any special campaigns like an annual giving pledge, disaster relief or volunteer campaign? Does your program have any type of incentive to encourage employee participation, like dollars for doers or volunteer for time off? Do you have any specific charity partners or corporate pillars?

For corporate grantmaking requirements, think through your internal controls and processes for accepting, reviewing, and approving applications. How do you disseminate communications to your grant receipients and receive followup reports? Ask about platform automation and workflow management that can save your team time.

Technical Requirements

Consider any IT requirements or customizations. Do you require single sign on? Do you need a hybrid or basic authentication method for employees who do not have access to the network? Do you need to import historical data? Do you need a solution that is mobile friendly?

Reporting Capabilities

What type of reports does a board or investors need to see? What data would be most useful to the c-suite vs managers in each business office? Which-out-of-the-box reports do you need? Do you use any custom reports? Do you need automated, scheduled reports?

Training and Support

Every new system and software solution has a learning curve. Any technology vendor will show you all the bells and whistles to help you understand the full breadth of their capabilities, but you'll also want to make sure you understand what it takes to operate those features day to day. How much hands-on support is required to make the system functional? What is your time frame from evaluation to implementation?

Budget

Make sure the pricing plan for the vendor gives you access to all the features you need. If you're exploring giving programs, be sure to ask about the fee structure on donations and disbursements. Is your organization considering covering the cost of fees when employees make a donation, so the nonprofit gets the full amount? Do you need extra program services support that would fall under customer service charges from the vendor?

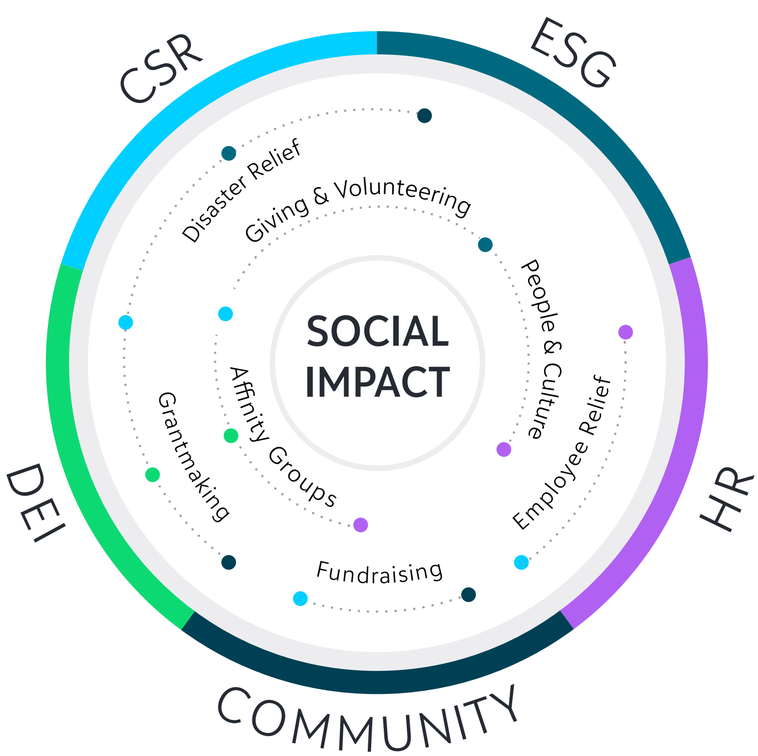
Once your organization thinks through the answers to the questions you should have a guide that can navigate your evaluation of CSR software. Your requirements should reflect a holistic view of your social impact programs as they relate to internal and external stakeholder's needs.

Defining Priorities

You don't want to pick a platform that only meets your needs for today. Defining what's in scope and what your future goals are lets you clearly see what you need from a solution and how you can leverage it for future growth.

If you looked at CSR software 10 years ago, you would have noticed there were limited companies offering solutions. Since we launched our CSR platforms 15 years ago, there has been a rise in CSR technology platforms which can vary greatly in cost and functionality. You also have to consider the people behind the product and if they are going to provide the support your team needs to be successful.

Corporate philanthropy was more traditionally known as how companies give back to their community, i.e. external stakeholders. Today, companies are shifting to a more holistic view of CSR and how their programs support their employees, their community and the planet. All stakeholders including consumers, investors, employees and the community want to know a brand's purpose and how that business stands up for social and environmental issues. You can checkout our Building the Business Case Series for a compilation of stats on the importance of CSR and ESG from each stakeholder point of view.



WHAT TO KEEP IN MIND WHEN EVALUATING CSR SOFTWARE

It connects your various programs to provide centralized social impact

Your employee engagement goals may incorporate giving, volunteering, fundraising and connecting DEI with CSR initiatives. On top of that you may have community investment grants, disaster relief, employee relief grants, scholarships, etc. with various program needs and requirements. All of these initiatives need reporting and data on how these programs make an impact towards your goals that fall under the S in ESG. Even if you don't have quite this many initiatives, you can select a solution that has flexible functionality to meet your unique needs.

Related Resource: Checkout Realized Worth Institute Corporate Volunteering Giving, and Grants Technology Review. This report offers a vendor agnostic deep dive into what functionality each platform offers.

It meets your needs and budget.

Organize your list of requirements in buckets that are a must-have, nice to-have, and not needed at this time. This will help you prioritize what capabilities are critical. Does the vendor let you pick and choose features or package things together under one price with features that you aren't using?

You're prepped for success.

Your software vendor should include excellent product documentation and self-help resources. Understand what customer support looks like not only for the administrators running the programs with the software, but also the end users like the employees and your nonprofit partners.

You're confident in the nonprofit vetting and funds disbursement process.

One massive benefit to partnering with a CSR vendor when it comes to facilitating giving programs is having access to their donation disbursement process. Having a trusted partner to help you navigate the regulatory landscape, ensure that charities are compliant and reputable, and manage the ins and outs of checks vs electronic payments can save you a TON of time and headache.

Discovery Preparation

Every company has a unique culture, and their software evaluation process will differ.

Companies large and small are engaging in CSR. You'll find a compilation of questions that we feel are important to ask that ensure the vendor you select can support the nuances of your program.

This section starts with basic vendor evaluation questions to ask whether you're purchasing employee engagement software or grantmaking software followed by sections to ask for each solution.

BASIC SOFTWARE VENDOR EVALUATION QUESTIONS

Platform Access and Integration

Describe your product suite. Do your employee engagement and grantmaking solutions integrate?

Are we able to pick and choose different features to turn on now with the potential to phase in additional functionality over time?

Do you offer Single Sign-On? Do you offer a hybrid or basic authentication method for employees who do not have access to the network?

Does your platform allow for external API integrations?

Charity Vetting

How is the charity database managed?

Do you allow users to write in organizations into the database? If yes, how are these organizations vetted?

How do you limit the charity database based on a specific list of organizations or criteria defined by the client?

What is the overall process and timeline for vetting nonprofits?

Global Capabilities

Which languages does your platform support?

How many currencies does your platform support?

How many global organizations are eligible to receive funds within the platform?

Describe your experience in supporting global programs.

Does the platform provide a localized experience based on the user's location?

Customer Support

Describe your customer support model. How do you support program administrators and end users?

What is the process for collecting platform improvement suggestions from clients?

How often do you release platform updates?

Describe your approach to innovation- what upcoming road-map items do you think we should be aware of?

How do you partner with your clients to provide strategic guidance, share best practices, and collaborate and discuss industry trends?

Describe what support is provided for our nonprofit partners.

What hours will your customer service team be available?

What is your average response time for end-user inquiries?

What customer support and service awards have you won?

Does your company offer program services (i.e. services to help manage manual administrative tasks)?

Implementation

Please provide a sample implementation project plan that outlines key tasks and timelines based on our desired launch date of X/XX/XXXX.

Reporting

What types of standard reports & dashboards are available?

Can clients build custom reports and dashboards?

Does the platform offer Sustainable Development Goals reporting? Please describe.

Can clients view data across employee engagement and grantmaking programs within a single reporting interface?

EMPLOYEE ENGAGEMENT, VOLUNTEERING AND GIVING EVALUATION QUESTIONS

Can the interface be configured to reflect our corporate and/or program branding?

Are administrators able to make graphic and content changes to the platform or do those requests need to go through a service desk?

Does your platform offer functionality to manage employee resource groups?

What unique gamification capabilities does your platform offer (ex: voting programs, competitions/challenges, employee recognition)?

Are we able to segment the platform for different users (For example, users in different locations access a specific version of the community homepage and/or have access to different features)?

Does your platform allow for designated administrators to impersonate other users?

Employee Giving

What donation options does your platform support?

What types of giving campaigns can your platform support?

Are matching gift programs supported? If so, can we establish eligibility requirements and parameters for matching? Can we create multiple matching programs?

Describe the donation checkout experience for employees. Are employees able to add more than one charity to donate to a time?

Does your platform enable peer-to-peer fundraising? Can external users make donations?

How are users informed of their donation status and history? Are users able to download tax receipts?

Employee Volunteering

Can users log individual volunteer hours outside of team volunteer events?

Does the platform provide robust volunteer event management tools that can support both traditional & skills-based volunteering opportunities?

Are users able to search and sign up for events?

How are volunteer events populated? Are we able to identify specific charity partnerships for event population and other volunteer initiatives?

Does your platform enable “dollars for doers” or other volunteer rewards? Are users able to apply for and track the status of volunteer grants?

GRANTMAKING EVALUATION QUESTIONS

Describe the application intake process

Does your platform allow for invitation only and public grant programs?

Can administrators build custom grant application forms? Do you offer standard application templates?

Do your forms support electronic signatures?

Can grant programs be funded from multiple sources? What are the payment processing options?

Describe your grant workflow automation tools.

Can grant applicants save their application in draft mode? Can the platform auto-save an applicant’s progress as they complete an application form?

Does your platform allow applicants to add collaborators?

Can you request a revision on an application?