

CSR Software Buyer's Guide

What to consider and how to assess CSR software solutions to boost your organisation's social impact.



The right technology can transform the way your organisation does Corporate Social Responsibility (CSR), enabling you to create more impact with fewer resources. Whether you're looking for a CSR platform for the first time or considering switching vendors, this guide will help you assess your options. We'll give you step-by-step guidance on how to match your CSR programme's goals and needs to the right software solution.

Table of Contents:

- 3 Assembling Stakeholders
- 4 Gathering Requirements
- 6 Defining Priorities
- 7 Discovery Preparation



Assembling Stakeholders

Before you start to define your vision for a CSR platform, you need to map out the needs of 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

- Find a colleague who has previously navigated the software purchase process at your organisation. They can share their experience on what steps you might need to take.
- Identify all internal stakeholders early on. This will help avoid delays in the contract and implementation stages.
- Once you've identified your stakeholders, keep them in the loop throughout the process.

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 need to be met 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 happen 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 people from your Finance team. Disbursing donations comes with a lot of red tape, and rightfully so. Your colleagues 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

Consulting those who lead employee engagement efforts at your organisation is vital when it comes to purchasing a CSR solution. This can include Diversity & Inclusion teams, Internal Communications, and Human Resources. They can help you identify synergies between their programmes and the CSR platforms you're exploring. Aligning 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 organisation 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 team is involved if you're exploring any type of CSR solution. They are an important stakeholder when it comes to managing employee data.

Marketing, Communications and Brand

CSR can have a positive impact on a company's brand. Involving the Marketing & Brand team in your process will be helpful in identifying platforms that help tell the story of the impact you're making in the community.

In addition, many platforms in the market are white-labelled and can be configured to reflect your brand's image. Your Marketing & Brand colleagues can help you design the platform during the implementation phase.



Gathering Requirements

It's crucial to take the time to thoughtfully gather the requirements for your platform. This can make the difference between choosing a software solution that moves your programmes 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 stakeholders' ideal world and prioritise their wish list
- Keep in mind your programme goals

MAKE A LIST

By answering a few questions in each of the following topics, you should be able to create a list of requirements that will guide your evaluation of CSR platforms. Your list should reflect a holistic view of your social impact programmes, considering the needs of internal and external stakeholders.



Functional Requirements

Put together an overview of your current CSR programmes. How do you engage your employees? Do you run any special campaigns, like an annual giving pledge, disaster relief, or volunteering events? Do you offer any type of incentive to encourage employee participation, like donating cash to organisations where employees volunteer, or offering additional time off for volunteering? 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 recipients and receive follow-up reports? Consider platform automation and workflow management features that can save your team a lot of time.



Technical Requirements

Consider any IT requirements or customisations. 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 the board or your investors need to see? What data would be most useful to the C-suite or to the managers in each territory? 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. Technology vendors will show you all the bells and whistles to help you understand their capabilities, but make sure you also understand what it takes to operate those functionalities day to day. How much hands-on support is required to make the system functional? What is your timeframe from evaluation to implementation?



Budget

Make sure the price you're paying gives you access to all the features you need. If you're exploring charitable giving platforms, ask about the fee structure on donations and disbursements. Who will cover the cost of fees when employees make a donation? Will you need additional support that would trigger Customer Service charges from the vendor?

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.

Since we launched our CSR platforms in 2008, there has been a rise in the number of CSR software solutions in the market. They can vary greatly in cost and functionality, and also in the level of support that vendors offer to their customers. In addition to those, there are other aspects you should consider when assessing CSR solutions.

CONNECTING THE DOTS OF CORPORATE IMPACT

While in the past corporate philanthropy was focused on external stakeholders (i.e. the community), today Corporate Social Responsibility is more holistic. Organisations consider how their programmes support not only the community, but also their employees and the planet. This means that CSR likely affects the goals of different teams and programmes in your organisation.



For example, your employee engagement programme may incorporate traditional CSR elements like charitable giving, volunteering, and fundraising, or you might wish to connect DE&I with your CSR initiatives. On top of that you may have community investment grants, disaster relief, employee relief grants, scholarships, etc., all with diverse requirements.

When assessing CSR solutions, consider how all these initiatives need reporting and data on their impact. Even if you don't have all of these programmes today, selecting a solution that has that kind of flexibility will allow you to grow your CSR programme without needing a different software in the future.

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

WHAT TO PRIORITISE WHEN ASSESSING DIFFERENT PLATFORMS:

It meets your needs and budget.

Organise your list of requirements in categories that are a must-have, a nice-to-have, and not needed at this time. This will help you prioritise which capabilities are critical. Does the vendor let you pick and choose features, or do they package things together under one price, with features that you won't use?

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 programmes with the software, but also for end users like your employees and charity partners.

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

A massive benefit of partnering with a CSR vendor when running charitable giving programmes is having access to their donation disbursement process. A trusted partner can help you navigate the regulatory landscape, ensure charities are compliant and reputable, and manage the ins and outs of checks or electronic payments, saving you TONS of time and headaches.

Discovery Preparation

Below you'll find a list of questions that are important to ask, to ensure the vendor you select can support the nuances of your programme.

We start with basic vendor evaluation questions that apply to both employee engagement software and grantmaking software; this is followed by questions that are specific to each type of solution.

BASIC SOFTWARE VENDOR EVALUATION QUESTIONS

- 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 company network?
- Does your platform allow for external API integrations?

Charity Vetting

- How is the charity database managed?
- Do you allow users to enter new organisations into the database? If yes, how are these organisations vetted?
- How do you limit the charity database: based on a specific list of organisations or based on 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 organisations are eligible to receive funds through the platform?
- Describe your experience in supporting global programmes.
- Does the platform provide a localised experience based on the user's location?

Customer Support

- Describe your Customer Support model. How do you support programme administrators and end users?
- How do you collect platform improvement suggestions from clients?
- How often do you release platform updates?
- Describe your approach to innovation. For example, what upcoming roadmap items do you think we should be aware of?
- How do you provide strategic guidance, share best practices, collaborate and discuss industry trends with clients?
- 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 programme 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 programmes within a single reporting interface?

EMPLOYEE ENGAGEMENT, VOLUNTEERING AND GIVING EVALUATION QUESTIONS

- Can the interface be configured to reflect our corporate and/or programme 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 programmes, 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 programmes supported? If so, can we establish eligibility requirements and parameters for matching? Can we create multiple matching programmes?
- Describe the donation checkout experience for employees. Are employees able to add more than one charity to donate to at 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 “cash 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 programmes?
- Can administrators build custom grant application forms? Do you offer standard application templates?
- Do your forms support electronic signatures?
- Can grant programmes 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?

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