benevity™

Getting Started With CSR

A guide for powering purpose from the ground up

You've Got This

Designing a fit-for-you CSR program

"We can't run the type of corporate purpose programs other companies do."

"Our team is too small."

"I don't know where to start."

Sounds *familiar?*

Based on our 13 years of helping clients develop and launch CSR programs, we know that building a CSR program from the ground up can seem challenging, overwhelming and maybe a little intimidating.

But you've arrived here. *And we're here to help.*

We've prepared this blueprint to help you design a CSR program that works for you — and your company. Along the way we'll share examples and tips from some of the 700+ clients we've helped do the same. You're welcome to borrow ideas from this community and incorporate your favorites to achieve your goals. You don't have to be a big brand — or have a big budget— to be the good you want to see in the world.

Did you know?

74%

of mid-sized companies had no prior program before launching with Benevity.

Setting the
Foundation
A new approach to CSR

Building a CSR program is like building a house: you need to start with a strong foundation. And that foundation begins with infusing purpose across every part of your business. Investing in purpose fosters not only compelling and meaningful workplace cultures that engage employees, but it creates long-term social and business impact, too.

Consumers, employees and investors are also looking for more from the brands with which they choose to align. That's why more companies are taking a holistic view of their programs, empowering their people to do good in many ways — whether it's donating to a cause, joining an employee resource group (ERG) or engaging in small acts of kindness. CSR is no longer a side-desk obligation, but rather the means of infusing purpose throughout an entire organization — and something that should have the attention of executives, including the CEO and board of directors.

96%
of CSR professionals agree that storytelling is an important part of their organization's communications

88%
of consumers say they would buy a product from a purpose-driven company

75%
of employees say it's important their company shares their CSR goals, progress & related achievements
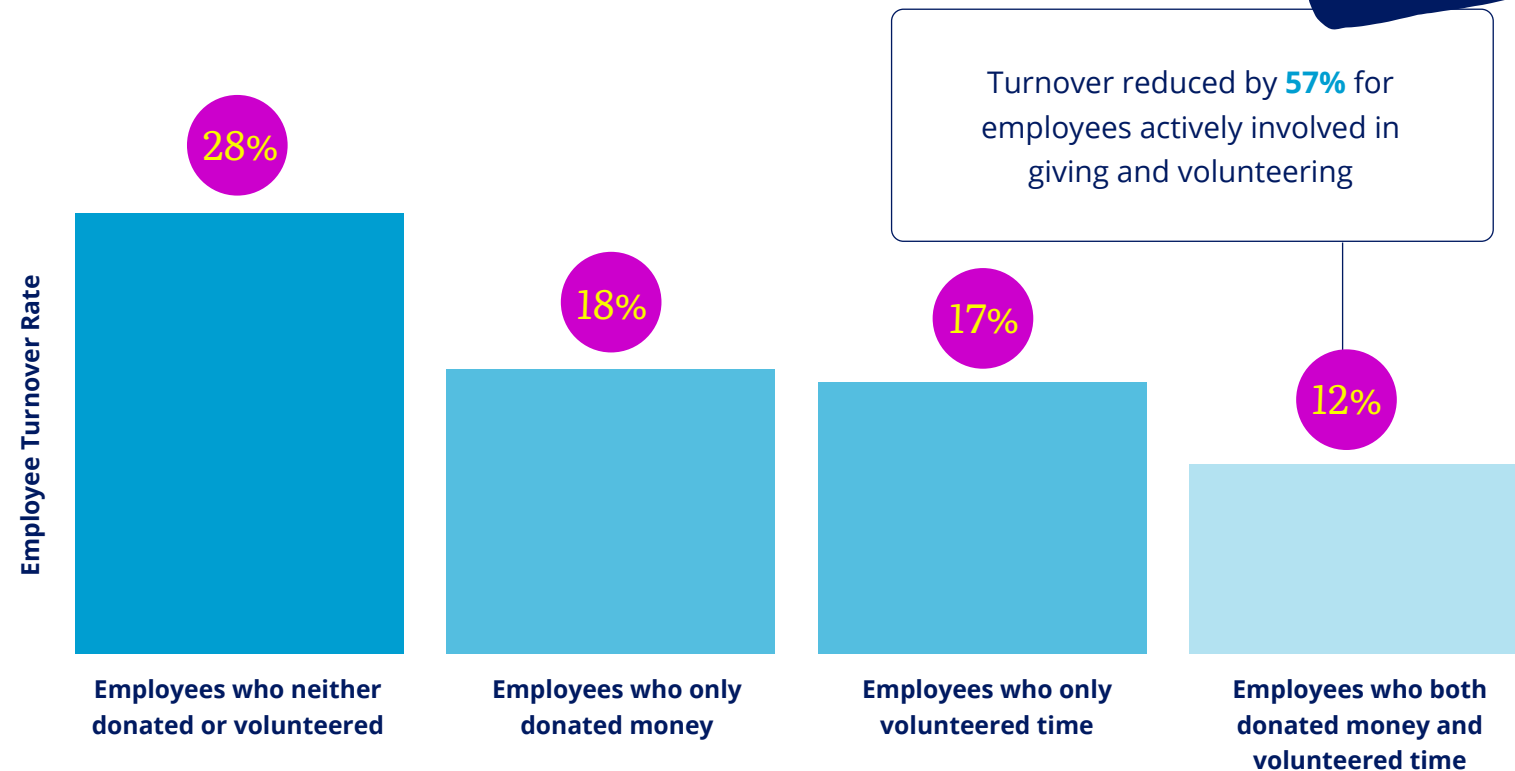
Setting the Foundation

CSR and Business *Outcomes*

At Benevity, we believe the best way to engage employees is through investing in purpose. According to a study we conducted, we found that employees who both give and volunteer are 57% less likely to leave than those who do not.

Investing in purpose drives gains in all aspects of your business, from strengthening your corporate reputation to building culture to attracting top talent to building a strong environmental, social and governance (ESG) profile. Employee and consumer loyalty flows from an authentic commitment to making a positive impact on the world.

Companies who invest in social purpose and harness its power see a *6% higher market value* and generate *20% more revenue*.

Turnover reduced by **57%** for employees actively involved in giving and volunteering

Employee Turnover Rate

28%
18%
17%
12%

Employees who neither donated or volunteered

Employees who only donated money

Employees who only volunteered time

Employees who both donated money and volunteered time

Corporate Purpose
Is a *Team Sport*

Since corporate purpose is becoming a strategic differentiator, and one of the very few levers for companies to drive authentic and empowered brands and cultures, for many companies it's no longer solely the domain of CSR and HR professionals. We've found that we are increasingly working with clients who are seeking ways of embedding purpose to achieve both social outcomes and business value. This has required an unprecedented level of collaboration with groups that may or may not have had a stake in your strategies and activities until now.

Human Resources · Community + Governmental Affairs · Chief Executive Officer · Mergers & Acquisitions · External Stakeholders · Safety · Chief Operating Officer · Payroll · Corporate Social Responsibility · Diversity & Inclusion · Corporate Communications · Chief Marketing Officer · Marketing · Leadership/Organization Development · Benefits & Total Rewards

## Marketing
Goodness matters because it:
- Authentically builds your brands and deepens connections in the community through prosocial behaviors
- Unearths compelling stories with supporting data
- Generates new themes and trends across your business

Corporate Social Responsibility
Goodness matters because it:
- Increases focus on positioning your company as a CSR leader
- Provides opportunity to gather robust data to show your organization's impact
- Strategically aligns your programs with your people's passions
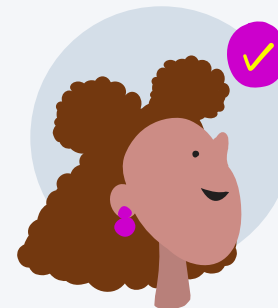
Talent/Recruitment
Goodness matters because it:
- Drives engagement and reduces employee turnover
- Connects people across locations and business units
- Attracts purpose-driven employees and rewards prosocial behavior

Building the Team

Start With a *Compelling Mission*

At Benevity, we know that starting a new program is no easy feat — often starting with a few people or even one person! With this in mind, we know that each moment, action and goal must drive results and impact.

That's where the importance of tangible, easy-to-understand and inspiring mission statements comes in.

This means ensuring that all team members feel included and empowered, while still laddering up to the collective key business objectives and goals. To do this, many Benevity clients have identified a few (3–4) key pillars of strategic focus at a collective level and use a corporate purpose program to support a larger and open-choice model.
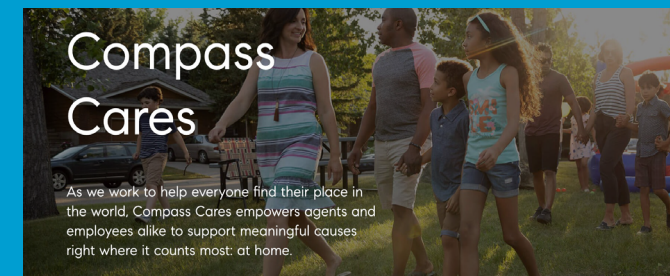
Here are two of our clients' mission statements

1 **Based in San Antonio, Texas, USAA made it a goal to end veteran homelessness in their city. And they did!**

OVERVIEW

CORPORATE RESPONSIBILITY

Our Purpose: To lead and inspire actions that improve lives in the military and our local communities.

2 **Headquartered in New York City, Compass made a commitment to donate back to the community a portion of every real estate transaction they make.**

Compass Cares

As we work to help everyone find their place in the world, Compass Cares empowers agents and employees alike to support meaningful causes right where it counts most: at home.

Recruit *Champions*

Call them Ambassadors, Champions, Catalysts or something else, but we recommend building a team of employees across your locations who can help you implement, scale and grow your program. This community is a group of dedicated individuals who are passionate about making a difference in their local communities and will take on additional responsibility to ensure your program is successfully engaging more people. This team will cheerlead, rally and inspire their co-workers to get excited about prosocial activities like giving and volunteering. Many of our clients will empower them to organize and lead campaigns at their specific locations and engage their co-workers in grassroots initiatives.

You may be surprised to find there are likely people already in all your locations willing to support purpose initiatives. No one knows local communities better than the people who live and work in them! Our recommendation is to begin by finding out who's already involved in their community, and who can speak passionately about why they support the cause(s) they do.

To find *your Champions*, here are a few folks you might want to reach out to:

- **Passionate participants:** the people you know who already participate within their communities will know more employees who are passionate about doing good, too!

- **Executive admins:** those with the connection to your executive team will already have a pulse on leadership cause support and commitment.

- **ERG/affinity group leaders:** these folks are often actively involved with causes that resonate with the specific group that they lead, and they are likely already volunteering as a group.

- **All-hands coordinators/internal communications team:** this team structures pertinent communications across a wider team and can quickly add you to the all-hands meeting schedule.

- **HR team:** with a broad knowledge across the organization, the people team will know who the high potential (HiPo) employees are within your company, and if any of them are looking for professional development opportunities. For example, being a Social Impact Community Chair provides the opportunity to gain leadership and project management skills, while also networking with leadership and gaining positive visibility.

- **Additional employee groups:** groups like leadership or intern programs can be powerful recruitment pools to see who might be interested in joining your team of Champions.

- **Field or deskless workers:** these employees may have different communication channels and ways of engaging than employees who work in your offices, so you can ensure your programs are inclusive for all of your people.

Find tips, templates and more in our guide, Build an Ambassador Network.

illumina

Building a Volunteer *Champion Program*

Illumina, a biotech company with several international offices, rolled out their global volunteer program thinking they knew what all their employees would connect with, based on the preferences of their U.S.-based employees. But when their program administrator went on a two-week trip to visit their offices in China, Singapore and Japan, she discovered their global volunteer program was getting very little pickup: not only were their international offices not running any volunteer events, but there was no ownership of the program and very little guidance.

In response, Illumina's program administrator pivoted to appointing Volunteer Champions in each region, giving them a budget to work with, setting goals and scheduling regular check-ins to discuss their progress. Linking local Champions with the larger global network also provided an additional layer of support and connection.

Illumina now holds four annual global volunteering events, and everything else is up to the Champions to create and communicate authentically and locally. Illumina's Volunteer Champion initiative has led to impactful, local volunteer event creation, which has had a positive impact on participation *and* morale.

Activate Your People With Purpose

Employee *Giving and Volunteering*

Employees are more likely to participate in a CSR program that values their experience and passions! The employee experience should be at the center of all participation opportunities. Every aspect of the program should help answer the question: How are we making this easier for our people to have an impact?

Key elements of an easy-to-use program include:

✔ **Open-choice giving,** so employees can choose which nonprofits they want to support based on their passions and interests.

✔ **Company incentives** like matching, seeding and volunteer rewards so you can show your employees you care and actively encourage them to get involved.

✔ **Payroll giving** to make it easy for employees to donate directly from their paychecks.

✔ **User-generated giving and volunteer opportunities** to enable your people to co-create your program from the ground up.

✔ **Geographically specific giving and volunteering opportunities** to engage employees in their local communities.

✔ **Flexible volunteering options** — including skills-based and virtual — so people can participate in small and big ways.

✔ **Quick and efficient nonprofit vetting and funds disbursement** to ensure every donation gets to the intended organization that needs it (no more manual checks).

Employee engagement levels in our Commitment to Communities program increased from 39% to 49% since moving to open-choice giving.

Lauren Fitzgerald,
Community Investment Specialist, Meridian

Activate Your People With Purpose

Opening the Door to *Participation*

Want to get as many employees as possible engaged in your program? Leverage elements like gamification, open-choice giving, and volunteer rewards that incentivize them and give them a stake in its success.

Volunteer Rewards

Volunteer rewards, sometimes referred to as dollars for doers, provide additional funds to employees based on volunteer hours and are gaining in popularity. For example, if an employee participates in a day-long corporate-sponsored volunteer program of a house build, that employee would be rewarded for their eight hours of time, with funds going into a giving account (often at $20/hour times 8 hours = $160). The employee can then direct those dollars to the nonprofit of their choice. You've amplified their impact by enabling both volunteerism and giving. Volunteer rewards are most powerful when they're open choice too, empowering your employees to then donate the funds to the causes most important to them.

Missions

Encouraging small positive actions by your people is another inclusive way to do good and create major social, personal and business impacts. For example, Benevity clients can use our Missions module to empower and motivate their employees to do more good through gamified and easy-to-complete activities. Whether it's taking shorter showers, educating themselves on racial inequity or registering to vote, Missions activities can promote awareness, develop empathy and encourage socially conscious behavior. Regardless of time, money, location or job type, anyone can participate in Missions, so it's the great engagement equalizer. And a great team builder too!

Linda Templeton

`TOP 15%`

🏆	✔️	☑️
5500	**8**	**36**
Points earned	Missions completed	Activities completed
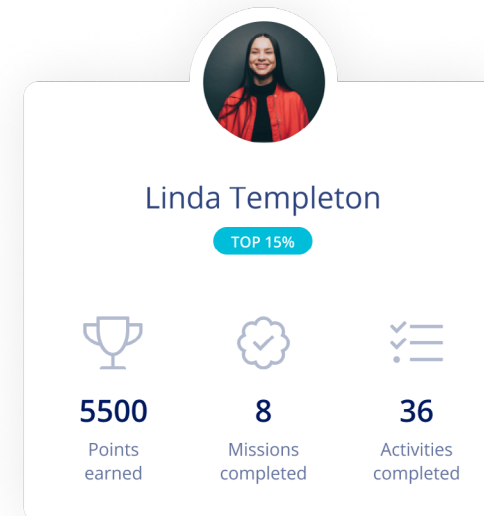
Open-Choice Giving

The most successful programs feature nonprofits and campaigns that align with company-level CSR goals and empower employees to engage with organizations that are important to them personally. It's all about finding a balance between company pillars and employee passions. In open-choice programs, employees are five times more likely to participate!

💡 *Pro Tip*

To understand which causes employees are most passionate about, we suggest conducting an internal survey. You might be surprised with what you find! By identifying employees' passions, you may find that there are additional cause categories to include in the company pillars!

Success Story:
Vancouver International Airport

YVR

2016: Only 4 causes available for employee giving

2017: Added an additional 100+ charities for their annual campaign

Goal: 40% participation

Incentive: $75K matching budget and the unveiling of the contents of a mystery briefcase …

The Results: Their employees gave $67,491.50 to 60 causes and went above and beyond 40% participation! The YVR Comms team opened the briefcase and gave a custom pair of YVR socks to everyone who participated. Here's a YouTube video posted to wrap up the campaign: Employee Giving Finale: Briefcase Revealed.

Activate Your People With Purpose

Shout It From the *Rooftops*

Your program can have the best incentives and program design, but if employees don't know about it, they can't participate.

These communication tweaks are easy to do and can quickly build awareness and trust among your people:

✔ **Scale your communications.** Request five minutes from management to have Champions (or leadership) speak at team meetings.

✔ **Raise awareness gradually.** Start with small campaigns (like Denim Fridays!) and promote recurring payroll donations in support.

✔ **Visually demonstrate progress toward a team goal.** Set a giving goal and visually track its progress in a common area. The total donations thermometer is very powerful!

✔ **Celebrate milestones.** Create buzz about your program by acknowledging employee participation. Start from day one! Include CSR training and do micro-volunteering during new-hire orientation.

✔ **Go social.** Encourage employees to post on their feeds and mention your CSR hashtag.

✔ **Leverage global events/days.** Be strategic with budget and create a "wow" effect at critical calendar moments or crises by running special matching campaigns. Many of our clients offer 2:1 or 3:1 matching on special dates like GivingTuesday, and one even offered 5:1 in response to COVID-19.

Assess Your
Impact

Demonstrate value to your company, colleagues, customers and communities

Pro Tip

Create a hashtag for your program that your people can use to spread a culture of Goodness across your company. It can also easily help you measure the number of impressions and mentions you receive across your social media platforms and see how your impact has amplified.

Type of Metric	Details
Transactional Metrics	**Program participation:** Take the number of employees who volunteer or give and divide by total employees. **Volunteer hours:** Total across the company and per person. **Number of nonprofits supported:** Since you're interested in employee engagement, having the number of nonprofits supported shows how active your employees are. **Percentage of employees who have logged in:** Once you implement a technology platform to help you scale, cross compare participation rates and logins. This will identify how well your program has been communicated. If conversion rates are low, you may want to reevaluate the incentives being offered. **Dollars invested:** Many of our clients like to highlight how much has been given back to their communities. **Skills-based volunteer hours:** Employees can self-select what skills they're using. Some companies will place a dollar value on these volunteer hours and share that as an investment figure. **Sustainable Development Goals:** Report out on results from campaigns that support the United Nations' SDGs. **Conversion rate after seeding:** The percentage of employees who made a donation with their seeded funds.
Engagement Metrics	**Number of employee-generated opportunities:** Employee-created content will help you understand how much ownership your employees have of the program. At Benevity, we believe this is a sign of true engagement. **Number of actions in platform per user:** You may be able to measure engagement if you see the amount of actions (giving/volunteering/Missions) in the platform increase over time. For example, 1.2 per user. **Voice of the employee:** Survey your employees and collect qualitative data. **Voice of the nonprofits:** Ask your employees to bring back stories from causes they support. **Social media:** If you have a program hashtag, measure the number of impressions and mentions you receive across your social media platforms.
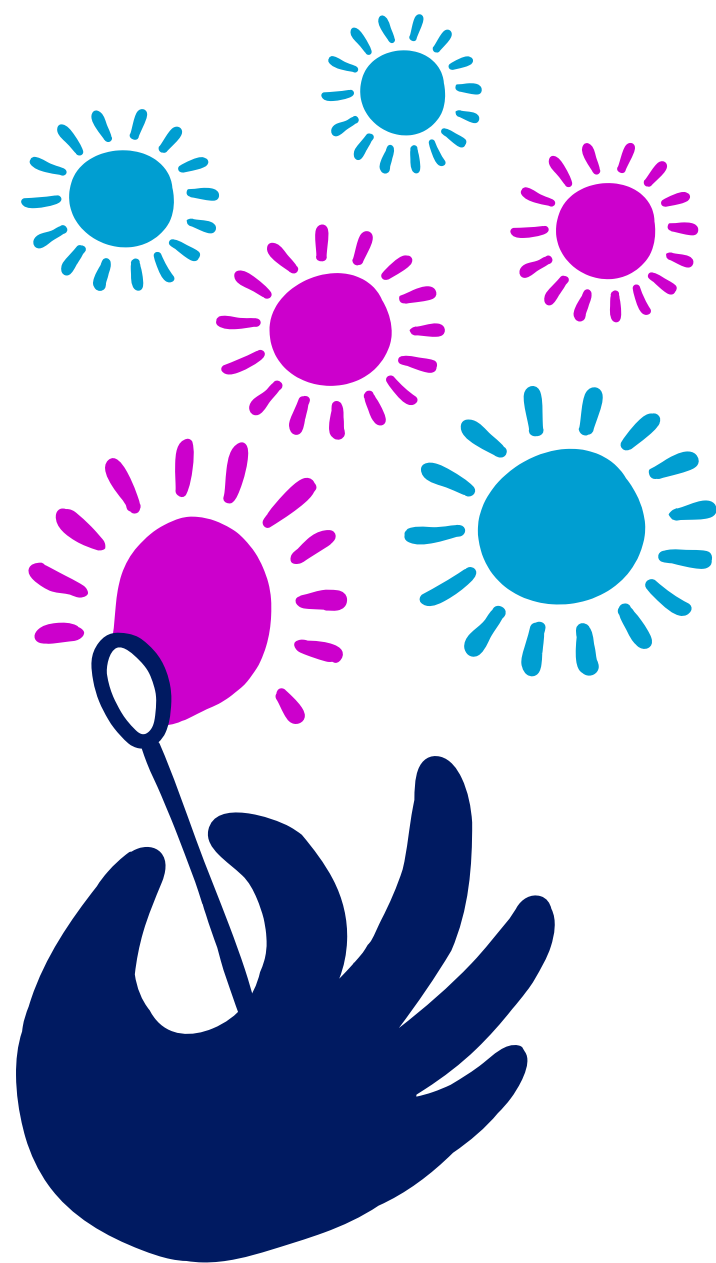
Choose a
Technology Partner

**An extension of your team
to help you bring it all together**

We've given you lots of ideas and a lot to think about! All of these things, paired with the right technology platform, can help you bring everything together and scale across multiple locations, time zones and functions if required. We know we're (a little) biased! But it's true — enabling purpose, engaging employees and creating social and business impact along the way can be a lot easier if you have technology to help streamline, automate, organize and manage it for you.

But there's a lot to think about when choosing a CSR software partner. Whether you're looking to build your program from the ground up or investing in software for the first time, having a partner that can grow with you will set you up for success — now and in the future.

At Benevity, we have worked with our clients to develop the Guide for Choosing an Employee Engagement Partner and outline a structure to help you find the best one for your program needs! This is a great guide to help you get started!

Good luck building your program!
And *we're always here for you* if you need help.

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