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A *Quick Guide* for Choosing an Employee Engagement Partner

10 capabilities they need to deliver on — and the questions to ask

We know that a good workplace giving and volunteering program is a great way to help employees gain a sense of personal purpose. And purpose leads to a better employee experience, builds culture and supports the attraction and retention of top talent, while creating the social and business impact companies — and their people — are looking for. In fact, turnover is reduced by 57% on average when employees are actively engaged in giving and volunteering at work.*

Executing a successful employee engagement program that is supported by your people isn't simple though. If you run a program, you'll know better than anyone how much manual work can be involved, making it difficult to create and scale the impact you want. The right technology can completely transform your program, but it's equally important to have the right technology partner who can help you launch, build and grow, and provide insights and best practices to ensure you succeed.

There's a lot to consider when choosing the ideal partner who aligns with your business and what you need. To help guide you in making the right choice, we've prepared some tips around the capabilities to look for and questions to ask.

* Source: Benevity Engagement Study, 2019.

Questions to ask...

1. Company Background

Your technology partner needs to have a proven track record working with other purpose-driven companies, and understanding their needs and goals, combined with the ability to tailor an employee engagement program accordingly.

Ask your potential partner:

- How many years have you been in business?
- What is your product suite? Is your product suite integrated?
- Who are some of your clients? What industries are represented in your client community?
- What are your company's differentiators?
- What are your company values and mission? Are you a certified B Corp.?

2. Client Success

A highly experienced team that includes full support for clients, end users and nonprofits — from best practices and strategic insights to technical support — can help guide you in the right direction.

Ask your potential partner:

- How many in-house people are on your client support team?
- Will you provide a dedicated team to support our program team?
- What about end users and nonprofits? Is there support for them too?
- Are there extra fees or limits on the number of inquiries?
- What is your client retention rate?
- Do you have an online resource center with tools such as on-demand webinars, best practices, guides, or online forums for your client community?
- What kind of campaign resources and ready-made content is available, especially in response to disasters or crises, or global events like Earth Day and GivingTuesday?

3. Volunteering

Volunteering provides meaning and impact that leads to both personal and professional growth — and connects your people to one another, your company and their communities. You'll want a partner who makes volunteering as easy as possible.

Ask your potential partner:

- How many volunteering opportunities are available? Can they be targeted to employees based on their geography, department or skills and interests?
- Can you set up and manage volunteering opportunities for employees and teams?
- Does your platform include the ability for employees to log and track their volunteer hours?
- Does your software support volunteer ambassadors?
- Do you support different types and sizes of volunteering (large and small events, virtual, skills-based, board service)?
- Do you offer automated and flexible volunteering rewards in the system?

4. Giving and Matching

Giving your people the broadest possible range of vetted nonprofits to support means they can easily connect with the causes they are most passionate about. This will be vital to driving engagement in your program. Making it even easier with payroll giving and automated tax receipts is also a must-have.

Ask your potential partner:

For giving

- Can employees donate to nonprofits of their choice?
- Can employees set up one-time or recurring donations through payroll?
- Can employees donate in their local currency?
- What payment methods can donors use (e.g., credit card, PayPal, Apple Pay, payroll)?
- Does your solution offer the ability for employees to track donations made outside of the platform?
- Can employees create their own fundraisers to share with co-workers, friends, family and social networks?

For matching

- Do you have automated matching? Can employees and executives offer their own match on each other's donations?
- Can you set custom rules and parameters, including matching percentage, total match threshold and different match rates based on user group or organization type?

5. *International Capabilities*

When selecting an employee engagement partner, be sure to think about their ability to create an inclusive experience that connects your people around the globe.

Ask your potential partner:

- How many nonprofits do you provide access to worldwide?
- What is your vetting process?
- How many languages does your solution support? Which ones?
- Do you understand the rules of payroll giving in different jurisdictions?
- For how many countries can you provide official tax receipts?
- In how many currencies do you enable payroll giving?
- Do you mark up currency exchanges?
- Do you have a global operations team monitoring and responding to emerging regulatory changes?

6. *Nonprofit Vetting and Support*

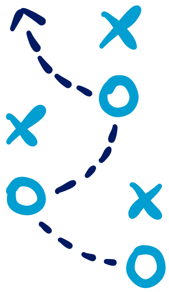
Vetting nonprofit organizations can be time consuming, complicated and costly — and the stakes are high. Giving to an organization that is not what it seems could mean misdirected dollars and a reputational risk to your company.

Ask your potential partner:

- What is your experience and expertise in vetting nonprofits?
- What is your process, including how you source nonprofits for your database and which watch lists you monitor?
- Are nonprofit administrators vetted or reviewed?
- Does your vetting account only for equivalency determinations (which can be burdensome on nonprofits, especially smaller ones), or do you provide determinations based on locally relevant criteria?
- Do you provide the ability for nonprofits in all countries to self-certify that they meet criteria that align with a company's corporate values (e.g., anti-discrimination, secular use of funds, political affiliation)?
- How do you ensure organizations are still in good standing before disbursing any funds?
- Do you charge for vetting and adding international nonprofits? If so, how much?
- Do you have dedicated staff handling nonprofit inquiries and administrative needs? How many?
- Do you have a dedicated portal where nonprofits can apply for eligibility and administer their profiles?

7. Disbursement Process

Getting donations to nonprofits is a complex process. The fewer the hand-offs between the donor and recipient nonprofits the better, ensuring a more secure and less costly transaction. Look for a partner who handles as much of each transaction as possible and whose disbursement process is focused on accuracy, cost-effectiveness and speed.



Ask your potential partner:

- Do you outsource disbursements to third-party providers or do it yourself?
- If you use a third party, what are their fees? Do you pass those fees on to the recipient nonprofits?
- What soft costs (for example check processing or recording) are associated with your disbursement process?
- What percentage of your disbursements is done by EFT (Electronic Funds Transfer)? Do you charge for electronic transfers?
- How do you distribute international donations, given checks are not accepted in many countries?

8. Security

Keeping your data secure is important for trust and brand reputation. You'll want a partner who is properly certified with the right safety features in place.

Ask your potential partner:

- Do you hold any security certifications (for example, ISO 27001, PCI-DSS or SSAE 18)?
- Do you support multi-factor authentication?
- Do you support single sign-on (SSO)? If so, what systems are supported?
- Do you maintain a process to detect, identify, report, notify our team, respond to and resolve security incidents in a timely matter?
- Do you perform internal audits on your internal processes, procedures and controls?

9. Reporting

To get a clear view of how your program is performing, you'll need to be able to measure all aspects of it. Comprehensive reporting features help you get all the detailed data you need to benchmark, improve and take your impact to the next level.

Ask your potential partner:

- What are your standard reporting capabilities?
- What are your custom reporting capabilities?
- Do you offer dashboards or visual analytics views?
- Does your reporting integrate employee demographic data?

10. Intuitive, Easy-to-Use Technology

Finally, and arguably most importantly, it is essential your technology is intuitive for your people to use and it can integrate seamlessly with your existing systems (like HR and payroll). One of the most significant factors affecting participation is ease of use for everyone.

Ask your potential partner:

- Do you meet Web Content Accessibility Guidelines (WCAG) 2.0 AA standards?
- Does the software require training for end users? Is there an additional fee for this?
- Does your solution allow us to personalize or brand the interface?
- Do you offer a mobile app?
- How does your integration work with payroll systems?
- Does your solution integrate easily with other HR systems, such as Workday?
- Do you have an API for integrations like e-commerce platforms and rewards programs?

Ready to learn more about how Benevity can help your employee engagement program?

Request a demo

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