

Corporate Purpose Playbook

Leading with *Purpose* During a Time of Crisis

The global reach and local impact of COVID-19 makes it truly unprecedented — challenging our health and safety, mental wellbeing, financial security, the way we engage and connect with our people, and the list goes on.

In the face of this adversity and uncertainty, companies are seen as the most trusted source, after health authorities, to help their people and communities. In fact, 78% of people expect their employer to take action to protect their employees and local communities, according to Edelman's special COVID-19 report. And 81% of consumers say brand trust is a deal breaker or deciding factor in their buying decisions.

While this places tremendous responsibility on the backs of the corporate community, it also presents a unique opportunity. Companies can help their people be part of the solution and provide them with a sense of purpose and efficacy, while also improving the landscape for health and safety, and helping us all adopt new habits that will shape our future.

*“How we respond to this crisis
— as companies and as people —
may be more significant than
anything we have ever done in
our lifetime.”*

“ ”

— Bryan de Lottinville, Benevity Founder and CEO

As leaders in the CSR and employee engagement space, we are already well positioned to mobilize collective action in our companies and communities. And many of you have already started.

Whether it's employee or public matching campaigns, new grants funding, pivoting to virtual volunteering or including small acts of Goodness in your programs, we are inspired by the action changemakers in our CSR community are taking. You are creating a movement! And in the spirit of "We Are We," Benevity wants to help propel this movement in any way we can.

Did You Know?

We have prepared a host of resources, best practices and ideas to help you respond to the COVID-19 crisis, inspire action in your company and community and look toward recovery. All of these resources are available on our [Resource Hub](#) and are designed to achieve four goals:

- ✓ **Prevention** — Empower people with credible information and actions they can take to limit the spread of the virus and do their part.
- ✓ **Crisis Response** — Quickly get funds and resources to the organizations that are working on the front lines to tirelessly solve the new challenges we're all facing.
- ✓ **Community Support** — Enable people to support their local communities and the nonprofits they care about most as the economic and social fallout mounts.
- ✓ **Employee Support** — Help your remote workforce stay engaged and adjust to their changing realities at home and at work, while also supporting their physical and mental health.

These four areas of impact will be a useful lens as you think about how to design your program to adapt and respond to this new world order.

Adapting Your Goodness Program for Our New Reality

This global crisis has required all of us to think differently about our corporate purpose programs — from volunteering to crisis response efforts and public support.

This guide provides you with program design strategies, best practices and tools to help you adapt your program in the context of COVID-19. It will cover four key program strategies:

- **Giving**
- **Volunteering**
- **Awareness & Action**
- **Public & Customer Relief**





Giving — whether it's employee giving or corporate grantmaking — is a powerful way to support local, national and international nonprofits who are providing immediate crisis response, as well as those focused on the long-term effects on our communities.

Employee Giving

Between March 1 and April 30, more than 250 companies in Benevity's client community have run giving campaigns. These campaigns are helping nonprofits do their important work, and they're also providing people with a way to be part of the solution. It's creating a personal sense of purpose, meaning and efficacy that improves mental health.

Program design recommendations:

Set up a corporate matching campaign

Incentives such as matching not only help drive participation, but also show employees that your company cares about what they care about. In addition to featured causes, consider including broad choice that allows people to support any local organization they care about most.

Did you know? Benevity has found that clients with matching have, on average, 80% higher donation participation compared to companies that don't.

Open your program

Allow employees to give or volunteer with any nonprofit they are passionate about, not just the ones your company supports. This is especially important right now, when there are millions of local organizations across the globe that have been impacted by the economic fallout and are facing new challenges accessing resourcing and funds.

Create giving opportunities that are relevant to your program and your employee base

For so many of us, this crisis hits close to home. Whether your people are looking to support their local food bank or they want to contribute to the healthcare response on a global scale, take the time to understand what matters to your employees. Then, feature nonprofits in your giving opportunities that are local and resonant with your different teams and offices.

Tip: Enlist your program ambassadors across your offices to help identify the immediate needs and organizations that need support in their areas. This will help you tailor your program to create a greater impact.



Did you know?

According to Benevity's data, employees with open choice programs are 2x more likely to donate — so this is an easy way to amplify the impact your people and company can make!

Your Giving Toolkit:

We've created giving opportunity templates to help you engage your people and raise funds for crisis response and community support.

Campaign Kit #1

Help Stop the Spread of COVID-19

This kit will help you create a campaign focused on crisis response that will support the global healthcare relief effort. The kit includes:

- A starter template with suggested text and imagery to create a giving opportunity.
- A curated list of recommended nonprofits prepared by our Cause Support team. These organizations are all actively raising funds to support the healthcare response. Many of the organizations — especially in the U.S. — operate in a global context and are helping both domestically and around the world.

Campaign Kit #3

COVID-19 Local Recovery

(for current Benevity Clients through the B-Hive)

This kit will help you create a campaign in **support of the local nonprofits** in your area that are helping people recover from the COVID-19 pandemic. It includes:

- A starter template with suggested text and imagery to create a giving opportunity
- Cause recommendations that include 182 nonprofits from 27 major U.S. cities, and 28 nonprofits from five major Canadian cities.

Campaign Kit #2

Care for Our Communities During the COVID-19 Outbreak

This kit will help you create a campaign focused on garnering local community support for a wide range of organizations who need help right now. It includes:

- A starter template with suggested text and imagery to create a giving opportunity.
- A list of recommendations on the types of local nonprofits to support during this time. This is a starting point to help you identify the specific organizations in your regions to focus on now.

Campaign Kit #4

Supporting Mental Health During COVID-19

(for current Benevity Clients through the B-Hive)

May is Mental Health Month in the U.S. This kit will help you **support major national mental health organizations** that are focused on providing crisis counseling, care and resources to people in need. It includes:

- A starter template with suggested text and imagery to create a giving opportunity
- Nonprofit recommendations for national causes in the U.S., the UK and Canada

How to use these resources in Benevity's Spark platform:

For Current Benevity Clients

1. Use the content resources in the campaign kits to create a Spark giving opportunity.
2. Apply a matching budget — matching funds will increase participation and impact.
3. Publish the News Item in Spark and use it as a template for your other internal communications.
4. Send the News Item as a Spark bulk email directly to your employees.
5. Share your campaign through other channels — i.e. email, intranet, social media.
6. Report back on progress through those same channels regularly to give people a sense of progress and accomplishment!

Corporate Grantmaking



When it comes to helping our communities, there are a number of things companies can do with their granting programs to help nonprofits with their missions now, when they need it most.

Program design recommendations

- **Lift restrictions:** Has your company distributed granting funds that can only be used for certain projects? Many companies in the Benevity community are dropping those restrictions so their nonprofit partners can use the funds as general operating funds or to build their organization's capacity, which allows for a more effective response.
- **Give emergency grants:** Do you have existing nonprofit partners who need more funding to effectively respond to the crisis, or who are struggling with a loss of funding from other sources? Consider sending them an invitation to apply for an emergency grant, and keep these tips in mind:
 - Make the application form as simple as possible since you already know who they are. That means leaving off time-consuming questions like asking for customized budgets.
 - If you typically have a lengthy decision-making process, find ways to cut that down so you can get the funds to the organizations who need them as soon as possible.
 - If you really want to get to impact right away, simply send a one-time gift to each organization you have in mind — no form required!
- **Drop or pause reporting requirements:** Nonprofits have different reporting requirements from different funders and all of it takes a lot of time and effort. Whether it's for funds you've already sent or for COVID-related grants you're going to send, consider dropping or delaying the reporting requirements to alleviate that burden right now.
- **Employee-nominated grants:** Your employees may care deeply about local organizations who need extra funding right now. If you have an invitation-based granting program, consider letting your employees nominate nonprofits to receive grants (and don't forget to use all the tips above!).

American Family Insurance Dreams

Foundation typically asks organizations to submit a letter of intent (LOI) and then invite select organizations to submit a full grant application. In light of COVID-19, the Dreams Foundation is adjusting their usual process so they can help their nonprofit partners faster. Organizations are being chosen for grants based on the LOI alone. And even better? The grants are unrestricted, so all their grantees can use funding for their most pressing needs.

Volunteering

With social distancing as one of the best defenses against the virus, volunteering programs are changing rapidly. No longer can we rely on large team-building events or service days at a local shelter to foster a sense of social connection in our companies. Instead, corporate volunteer leaders must reimagine their approach to volunteering to connect and engage people in new ways while supporting the nonprofits who need help.

Program design recommendations:

- **Pivot to virtual volunteering.** Whether it's skills-based volunteering, micro-volunteering or small acts of Goodness, virtual volunteering opens the door to a whole new way of thinking about what it means to volunteer. And it's quickly becoming a new norm for people who may not have engaged in traditional volunteering. Check out Benevity's list of recommended nonprofits with virtual volunteering opportunities available. We've also created templates to help you create your own opportunities and to encourage your people to give their time and talents.

Tip: Don't forget to connect with your nonprofit partners during this time to understand their needs and see how you can support them through virtual volunteering opportunities. Now is the time to work together!

Expand the definition of volunteering to include "small acts of Goodness." Look for ways you can tweak your existing program guidelines to include and reward small acts of community service. Things as basic as buying groceries for a senior or walking a single parent's dog while they watch their kids can have a huge impact. And you can amplify that impact by allowing your people to track their time and receive volunteer rewards!



Client Story: SAP recently launched a series of volunteering opportunities called #sapkids where SAP employees can support their colleagues who have kids by taking 30 minutes to do a virtual music class, exercise, story time, or whatever else they can think of!

How amazing is that?

- **Remove barriers to your volunteer rewards:** To help encourage participation, consider removing the time thresholds on your volunteer rewards to encourage people to participate in small, but meaningful ways. It tells your people that every minute of their time counts and allows them to earn and accumulate rewards that can turn into financial support for the organization they volunteer with, or other nonprofits they care about.
- **Did you know?** Volunteers are donors too! Among employees who volunteer, 72% also donate money through their workplace giving programs, according to Benevity client data. And when they do, they give twice as much as those who don't volunteer.

For more detailed tips and tricks on how to shift your Volunteering program, check out [**Benevity's Virtual Volunteering Guide.**](#)



Watch the on-demand webinar "[**Reimagining Volunteering: Creative Ways to Do Good in a Time of Crisis**](#)" to hear from Accenture Canada, Dolby Laboratories and VolunteerMatch about how you can reimagine your volunteer program.

Your Volunteering Toolkit:

Recommended Nonprofits & Resources for Virtual Volunteering

This is a curated list of nonprofits who are creating interesting, engaging virtual volunteer opportunities. These organizations have been carefully selected by Benevity's Cause Support team and can be shared with your people or serve as inspiration to create your own virtual opportunities! Here's what you need to know:

- The list can be sorted by the activity category including translation, transcription, mentorship and community service.
- We've provided links to each nonprofit's website.
- Opportunities that are already available through Spark are flagged.

Volunteer Template #1

Virtual Volunteering

This template will help you set up an open-ended callout for virtual volunteering to your people. It includes:

- A volunteer opportunity template for Spark prompting people to seek out and participate in virtual volunteering, including a list of nonprofits creating interesting opportunities, sorted by activity type (translation, mentorship, etc.). You can edit and adjust this list as needed to suit your program and pillars.
- Instructions for users to track time.
- A News Item to promote the opportunity to your people and encourage remote volunteering broadly.

Volunteer Template #2

Skills-Based Volunteering

Skills-based or pro bono volunteering lends itself really well to a virtual context, and is especially valuable to nonprofits who have had to make staffing cuts. This template helps you encourage people to share their skills and expertise. The template includes:

- A volunteer opportunity template for Spark helping people think about skills-based volunteering in a remote context, with suggestions for professional services activities that can be performed for nonprofits virtually.
- Instructions for users to track time.
- A News Item to promote the opportunity to your people.

Volunteer Template #3

Small Acts of Goodness

This template will help you promote small acts of community service through your volunteering program. It includes:

- A volunteering opportunity template for Spark encouraging people to consider their good deeds in the community as volunteering.
- Instructions for users to track time.
- A News Item to promote the concept and opportunity to your people.

Volunteer Template #4

Track Your Time Reminder

This is a basic template to prompt people to track their volunteer time.

How to set up in Benevity's Spark Platform:

1. Embrace "Small acts of Goodness" as a concept and expand your volunteer program to promote, encourage and recognize these activities.
2. Consider using volunteer rewards to incentivize remote volunteering and small acts of Goodness.
3. Publish the volunteer opportunities we've provided and set them up as open-ended, ongoing callouts.
4. Publish the Spark News Items to promote these volunteer opportunities and encourage people to take part and track time.
5. Send the News Items as a Spark bulk email to reach your people directly.
6. Share your campaign through other channels —i.e. email, intranet, social media, etc.
7. Report back on progress through those same channels regularly to give people a sense of progress and accomplishment.

Awareness & Action

As we reimagine the ways we work and live, your CSR program is a valuable platform for helping to keep people healthy, engaged and connected. One way we're seeing companies deliver trusted health information is through learning and awareness content that also allows their people to take small actions and develop positive behaviors that protect them and their communities. The content in our COVID-19 Missions challenge includes activities like taking precautions to protect yourself, taking an online course to upskill, and supporting local businesses without leaving your home. We've created a variety of resources to help you with this.

COVID-19: Stay Safe, Smart and Supportive: Missions Challenge

For Benevity Clients with Missions

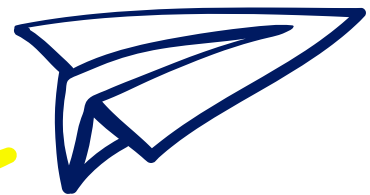
This Missions Challenge is aimed at small activities that people can complete to increase their awareness, prepare their homes, and care for themselves, their families, and their communities. The content includes:

- 10 Missions: Tips for Protecting Yourself & Others, Using Social Media Consciously, Preparing Your Home, Maintaining a Health Mindset, Show Support for Others, Working from Home, Supporting Seniors, Helping Healthcare Workers, Ordering Essentials Online and Learn Something New.
- Your Client Success Manager can help you upload and implement this content as a Mission in your Spark site. We've also included all of the source files, including the copy and images, for you.

How to use these resources:

1. Connect with your Benevity Client Success Manager to activate the Missions library in your site
2. Use the News Items to increase awareness of the content for your people, and send them as bulk emails through Spark
3. Encourage participation and provide fun rewards to people for completing the activities
4. Cross-link the Missions with your volunteer activities — especially your callout for small acts of Goodness — and your COVID-19 giving opportunities
5. Share the activities and the key messages through all channels - i.e. email, intranet, social media, etc.

SAP is providing employees with learning and awareness content, and encouraging small acts of Goodness, through their corporate purpose program. The content includes resources for understanding COVID-19, providing tools to help have COVID-19 discussions with kids and taking actions to help maintain employee health and well-being and spread positivity.



Public & Customer Relief



According to Edelman research, 81% of people said trusting a brand to do the right thing is a deal breaker or deciding factor in their brand buying decision. Your business has an opportunity to show your commitment to purpose not only to your employees, but also to your customers and the public.

People want to connect to something bigger — something personal — and brands that help them do it will create long-lasting impressions. Launching a public giving campaign is an effective way to empower your customers and the public to be part of the solution, and it creates a sense of efficacy through your brand. This will help build trust and connection with your customers and communities. And we've seen it work up close!

Using our own Community Impact Portal, Benevity recently created a COVID-19 public donation matching campaign. In under two weeks, more than 3,000 people across the globe came together to donate \$2.3 million to 812 nonprofits, proving the deep desire for people to do good, and to solve for others before themselves, even while facing their own challenges.



Did you know?

Benevity's Community Impact Portal is a public-facing microsite that allows your customers, clients, partners or the public to donate to vetted nonprofits using a credit card, debit card or PayPal. Donations are quickly and securely delivered to vetted organizations that need it most. And the best part? You can add corporate matching to specific giving opportunities to amplify the impact!

You can infuse purpose into your customer experience in engaging and meaningful ways through Benevity's API suite and giving widgets which enable interactions like purchase round-ups or loyalty reward point donations. In fact, customer charitable donations can be integrated into almost any application, including e-commerce, online banking, rewards programs dedicated giving sites and more.

Program design recommendations:

- **Drive engagement with corporate matching:** Offering matching on donations not only helps drive participation, but it also demonstrates to donors that your company cares about what they care about. It's one way you can build a stronger bond that goes deeper than other rewards programs. We know it's challenging to find budget to fund a corporate match, especially during these uncertain times. Make your matching budget as large as you can afford or consider re-deploying funds from your corporate grants budget to offer this special match.
- **Open choice:** We know that giving is personal, and that when people can choose which nonprofit to give to, they are twice as likely to donate. We also know it's important for people to be able to search and select causes that personally resonate with them. In fact, at the community level, it may be more important than ever to show support for local organizations that people rely on every day, especially as the economic fallout mounts and nonprofits struggle to cope with COVID-19.

Together, we can make a difference.

Together, *We Are We.*

COVID-19 has challenged us all to think differently — and running a CSR program right now is no easy feat. We hope that your passion, paired with our resources, will allow you to seize this amazing opportunity to foster a sense of togetherness and social connectedness that people are craving, while supporting our communities when they need it most.