

# EMPOWERING EMPLOYEES WITH PHILANTHROPY

A VALOIR REPORT

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**Employee philanthropy and corporate social responsibility (CSR) are more important than ever, as employees seek to give back to their communities and want their companies to show leadership. At the same time, human resources (HR) professionals seek to make employee giving part of their overall engagement and corporate social responsibility (CSR) strategies. However, the growing demands on HR challenge its ability to support employee philanthropy at scale. Technologies such as Salesforce.org Philanthropy Cloud help HR to enable employees to take the lead in championing causes and coordinating philanthropy while automating reporting. This drives participation while reducing the burden on HR. Coupled with thoughtful changes in people and processes, Philanthropy Cloud can help HR to elevate both CSR and employee engagement.**

The momentum for employee giving and activism is growing, as many employees seek to give back to their communities; influence policy on key issues like climate and diversity, equity, and inclusion (DEI); and make a difference. Pre-pandemic, job seekers were increasingly considering corporate social responsibility (CSR) and a company's commitment to its community as part of their employer evaluation process. Even in today's challenging job situation, employees still want to work for companies that are socially responsible, and want to work in an environment that supports their causes and values.

However, a lot has changed in the past six months. Human Resources (HR) has a new set of challenges and demands:

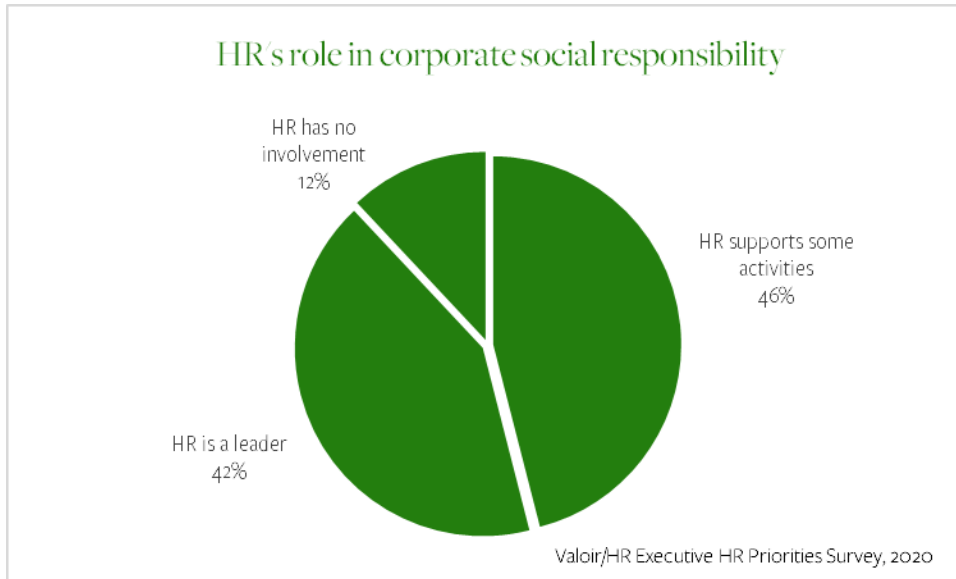
- In addition to supporting the transition to remote work and adjusting HR service delivery, new data and reporting requirements – on employee physical and mental health, workplace safety, and COVID contact tracing – are now on HR's list of responsibilities.
- A significant increase in the number of employee events, from spousal employment and health and insurance status to location changes to child care needs, has increased the volume of status changes HR has to manage.
- Increased corporate recognition of the need for more diversity and inclusion has added new programming, policy development, and data demands on HR.

To better understand the challenges facing HR professionals in the current environment, Valoir partnered with HR Executive Magazine to survey 128 HR leaders (predominantly in North America) from a variety of industries and company sizes about their priorities, challenges, and budgets. We also asked them about CSR, DEI, and employee giving, and how their strategies and budgets for those areas had shifted since the beginning of 2020.

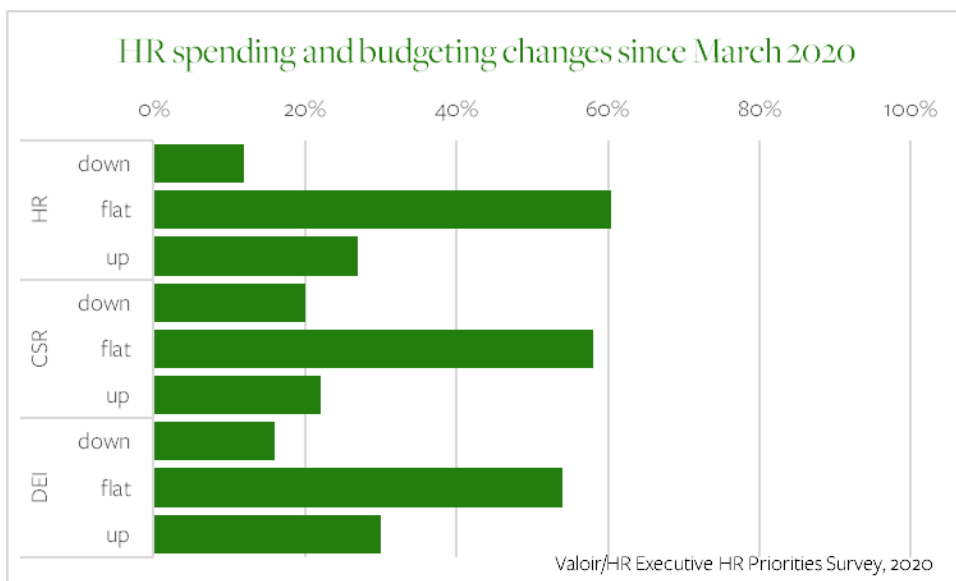


Forty-two percent of HR professionals say the HR department is a leader in CSR efforts, but only 1 in 10 would give their company an “A” grade for philanthropy and social responsibility.

Most HR professionals agree that support for CSR and DEI are important. On the CSR front, HR departments have historically taken the lead in coordinating company-wide philanthropic activities, such as annual United Way campaigns and days of service, and that has not changed. Valoir found that the HR department is seen as a leader in CSR efforts in 42 percent of companies.



However, such efforts have typically been top-down ad-hoc events rather than part of an overall employee philanthropy or CSR strategy. Today, few have an operational employee philanthropy strategy or the resources to support ongoing management and tracking of employee giving.



One in 4 companies have no application or database to track employee giving efforts, and only 1 in 10 would give their company an “A” grade for supporting employee philanthropy and social responsibility.

Our research found that despite the best intentions of HR, limited resources and lack of technology hinders execution of an operational strategy for DEI and CSR efforts. Although demands on HR have increased since the beginning of 2020, 60 percent of companies have had no increase in HR technology spending as a whole, and 20 percent have reduced CSR-related spending.

Given the limited resources and increasing responsibilities, HR has been forced to prioritize critical data gathering and issues resolution in areas such as health and safety, recruiting, service delivery, and benefits and compensation over areas such as DEI and CSR. Although they may have existing systems and applications to support other areas, few have technology to support DEI and CSR efforts, making them largely time-intensive manual efforts.

How can HR professionals facing so many demands meet the needs and expectations of employees around CSR and philanthropy efforts? To better understand how companies are leveraging technology to empower employees and remove the burden on HR to drive and track philanthropy efforts, Valoir conducted in-depth interviews with a number of Salesforce.org Philanthropy Cloud customers. The customers represented a wide range of company sizes and industries – from professional services to manufacturing.

Valoir found HR and CSR professionals were able to use Philanthropy Cloud to operationalize company giving and CSR strategies while supporting employee champions. They were able to take the burden off HR while increasing employee giving and engagement, and streamline the tracking and communication of individual and company impact.

This report explores the best practices HR and CSR leaders followed from a people and process perspective to maximize the impact of their Philanthropy Cloud technology strategy.

## Salesforce.org Philanthropy Cloud

Salesforce.org Philanthropy Cloud is a platform designed to give employees access to a global network of opportunities for donating, volunteering, and advocating for any cause. Developed initially in partnership with United Way, Philanthropy Cloud provides capabilities for employee volunteering, workplace giving, matching gifts and grants, and impact reporting. It gives HR the tools to enable employee-led giving and volunteering efforts while automating data capture and analysis.

Built on the Salesforce.org platform, Philanthropy Cloud’s cloud architecture follows the same principles as Salesforce’s CRM applications: access from



Despite increased responsibilities, 60 percent of HR departments report no increase in budget since the beginning of 2020.

anywhere, ease of use, low-code development, and native mobile capabilities. Using Salesforce.org Philanthropy Cloud, HR can:

- Share information on volunteering and giving opportunities, as well as related content, with their employees.
- Track employee engagement and involvement, enable employee resource groups (ERGs) and champions to build and lead their own giving campaigns and volunteering events, and enable individuals to identify causes and opportunities that interest them.
- Automate employee-elected payroll deductions or credit card-based giving on a one-time or ongoing basis.
- Use reporting and analytics to understand and communicate the local and companywide impact of employee giving and volunteering efforts.

We found Philanthropy Cloud enabled increased HR productivity and visibility (with less time devoted to coordinating and reporting on philanthropy and CSR activities), increased employee engagement, and improved CSR tracking and communication. Use of Philanthropy Cloud also drove greater visibility for companies' activities as socially responsible brands and contributors to local communities.

## Best practices

Valoir found that the HR leaders that had the most success with Philanthropy Cloud followed a number of best practices that took advantage of the unique capabilities of the platform while aligning the technology to the nature and expectations of their employee base.

### MAKE IT DIFFERENT

Although many Philanthropy Cloud customers started using it to automate their annual United Way campaign, those that were most successful moved beyond just one-time giving to make it part of a broader employee-driven volunteering and engagement strategy:

*“We’re trying to do corporate volunteerism differently and don’t want employees to feel obligated to get involved. Rather, we have employees find what they’re interested in, and say, ‘Here’s a platform that allows you to build what’s important to you, but allows me on a corporate level to better understand what interests you, so I can build out a community that engages you.’”*

*“We were looking for a platform that offered more than just giving. So we could say to employees, ‘Here’s a tool you can use for volunteering,’ so people saw it differently from the one you went to every year for our annual giving campaign.”*

Philanthropy Cloud enables HR professionals to leverage technology to think about managing and tracking giving in new ways. The benefits of a cloud-

*“We launched Philanthropy Cloud as a volunteering-first platform. We had a giving platform in the past but wanted something that offered more than just financial giving, so employees would see it differently.”*

Director of philanthropy and social impact, Fortune 500 CPG company

native and mobile-first application with high usability, democratization of ownership and management, and access from anywhere enables them to rethink their philanthropy and giving strategies.

## GIVE CHAMPIONS THE REINS

A common theme we heard from HR was that making Philanthropy Cloud employee-led and HR-enabled, rather than HR-led, was key to broad adoption. Many leveraged existing ERGs and interest group leaders to drive content development and posting of volunteer and giving opportunities:

*“We identified two people from each of the groups to be champions. Many ERGs have their own volunteer goals, and we wanted to support that.”*

*“Business employee resource groups do a lot to champion volunteerism in the community. We leveraged them early on and now have a champion role in Philanthropy Cloud, so champions can create opportunities themselves. We train key ERG leads and empower them to do this themselves, which also offers some relief to the person on our team who was having to manage all this.”*

*“Every element that we have exists because we have champions. [Management] will say we have a need, but someone steps up and says how to address it. The platform is just a tool to enable them.”*

HR professionals are often challenged to support a growing number of ERGs and interest groups with limited resources. Philanthropy Cloud enables those groups to coordinate and promote their efforts while reducing the demand on HR. At the same time, analytics and reporting provide valuable data on ERG activity and employee engagement and impact.

## LEVERAGE PHILANTHROPY CLOUD FOR DEI

Although HR is being asked to review and implement policies and put new reporting in place to support DEI, the challenge for many beyond policy and data is how to operationalize and track DEI initiatives at scale. Valoir found many were using Philanthropy Cloud to enable DEI efforts, giving ERGs and champions a platform for their efforts:

*“We have ERGs for women, LGBTQ, veterans, African-Americans, Latinos ... and others. They feel ownership over our programs and we’re not on high saying ‘Here’s what you can do.’ They can control and be part of it, and when you have strong ambassadors, it strengthens your overall program.”*

*“Demand is growing for DEI – where can I donate that’s been vetted in my community and does the company match it? Everyone was asking for it help with DEI contributions, and we could do it quickly with Philanthropy Cloud.”*

*“We’ve started to use it for DEI programming. The DEI director is a champion and can put out content, and if there are certain racial justice organizations we’d like to promote and ask people to support or a volunteer effort that is around equity, we’ve used it as a platform for that.”*

With DEI, key parts of Philanthropy Cloud’s effectiveness were the democratization of the platform, ability to access from anywhere, and mobile capabilities. Although many organizations are just starting to coordinate broad employee-led volunteering efforts through Philanthropy Cloud, HR and CSR leaders see the employee-led capabilities as being particularly important in supporting DEI efforts.

### **KEEP TRAINING SIMPLE**

HR leaders found that the relatively intuitive nature of Philanthropy Cloud required fairly little training to get champions and employees started, and short and simple tutorials as well as open “office hours” for one-on-one support were all that was needed:

*“We put together a couple of short video tutorials – how to update your profile, donate, give, search for content. We did hold some lunch and learns and demos for employees, and did hours in the break rooms with computers to help employees set up their profiles if they wanted.”*

*“The biggest benefit is that [Philanthropy Cloud] is very user friendly. It makes donating really easy. You go into the system, it breaks giving down by lump sum or payroll deduction, and employees can see that it costs a cup of coffee a week, and there’s no barrier to giving up a coffee a week for a good cause.”*

Valoir found that although Philanthropy Cloud training needs were limited, they often varied based on the level of experience of users with consumer applications. Broad training on basic functionality coupled with one-on-one support for those who needed it was most effective. In many cases, communicating the benefits of the platform to specific ERGs was just as important as communicating about how to use it, particularly if it was replacing other tools.

### **ENABLE VIRTUAL VOLUNTEERING**

As many HR professionals seek to pivot toward more virtual volunteering, Philanthropy Cloud’s cloud-based platform and its ability to highlight virtual volunteer opportunities have helped them make that move. Philanthropy Cloud has enabled them to engage employees who didn’t typically participate in volunteer opportunities, because they worked remotely or were in physical locations with limited in-person activities:

*“We have a lot of sales employees and others that work remotely all the time anyway. They felt disconnected [from our volunteering*

*programs] because they weren't in an office to participate ... Now, no matter where you are, you can still feel like a part of something because you can log in and see what you've contributed and the overall impact."*

*"Early on [in the pandemic], people were asking, 'How can we help?' People wanted to feel that they were contributing to something. We had this platform where we could easily promote different opportunities and have people sign up for them. As the craziness has continued, demand has waned a little bit, but we have fall campaigns coming up – so we can do a big push on volunteerism in a virtual environment."*

*"We've had to make campaigns virtual. One of the benefits is that we can still remotely get people into the system to make their donations."*

A cloud platform that can be accessed from anywhere is ideal for supporting virtual volunteering, because location doesn't matter. The benefit of the shift to virtual activities is the ability to increase engagement and inclusion of all employees regardless of location.

## **MAKE GIVING PART OF OVERALL RECOGNITION AND TALENT**

Valoir found the most forward-looking HR managers were thinking beyond employee giving as a separate HR checklist and taking steps to include it in employee recognition, performance reviews, and even overall talent management. A standard and consistent way to record and report on employee volunteer hours and activities enabled them to have a data-driven approach to recognize employee giving and bring that data into the overall employee profile and career plan:

*"We created certificates for managers to hand out to employees during annual reviews, with stickers that represented events and number of hours, as a way to say thank you from the company. Employees appreciated that their service was recognized by management, and managers appreciated that they [performance reviews] had an element of positivity no matter how the review went."*

*"We have a platform for employee recognition where we all get a certain number of points and we can give those points to other people. Employees can turn them in for merchandise and other things. We're looking to create more of a structured thing around it [including volunteer hours as part of our recognition program] so we're regularly recognizing employees, [now that] we're able to pull reporting on who's volunteering and their hours."*

*"We got managers thinking that this is important. As a smaller company, we don't have a lot of clear-cut pathways for advancing your career – not a lot of management positions open. If you have*

*"When you can take a snapshot of your Philanthropy Cloud profile and what nonprofits you've been engaged in, you can show what expertise you have and promote yourself for the career you have now and what you want in the future."*

Community affairs program manager,  
regional utility company



*employees who are getting frustrated at annual reviews by not being able to advance, let's find different ways to help them develop skill sets and be recognized outside of their job responsibilities.”*

*“[Philanthropy Cloud] presents really great opportunities for skill set and leadership development, especially in DEI. It's allowed us to continue that conversation, about getting engaged in communities that don't look like you, in terms of professional development.”*

Valoir found that many HR leaders had a vision to integrate Philanthropy Cloud with Salesforce Trailhead and talent management applications. This would enable them to bring data on employee volunteering and skills – as well as engagement through philanthropy – into their overall HR system of record.

## **BUILD COMMUNITY, NOT JUST COMMUNICATION**

Valoir found that HR professionals who were most successful used Philanthropy Cloud as a means to support collaboration and community building around giving, not just outbound communications.

Additionally, incorporating data from Philanthropy Cloud into ongoing local and corporate communications drove broader awareness of their company's social goals and impact. Regular updates of internal stories and opportunities as well as local and companywide updates on giving were an effective tool for community and employee engagement:

*“Regularly communicating out in this time is particularly important. We're showing how corporate as well as employees are supporting our communities, through regular town halls and communications.”*

*“We use the reporting on volunteerism and statistics in our annual report. That goes out externally and internally to stakeholders.”*

*“We make sure content is as fresh as it can be – making sure that we create not just stories but campaigns and volunteer events.”*

*“[The approach of Philanthropy Cloud] is such an important way to think about employee engagement and a meaningful way to communicate, and they're so intertwined. This year is a very challenging one and this is one of the ways we can drive employee engagement.”*

Although there are plenty of top-down and broadcast communication tools for HR, leaders used Philanthropy Cloud to build a community around CSR objectives and local causes, driving greater employee engagement.

## **Looking ahead**

Momentum for employee philanthropy is growing as employees seek to make a difference in their communities. HR has always played a key role in CSR and company philanthropy; however, even in the best of times HR has

*“It's easy and streamlined and people can donate to the charities they want. We can feature charities on cards, and say, ‘Here are the charities we have a vested interest in.’ It's enabled us to streamline communications and do it in a much slicker way.”*

Marketing and social impact manager,  
strategy consulting firm

often had limited resources to allocate to CSR and philanthropy efforts. With the growing challenges and demands on HR, technology such as Philanthropy Cloud enables HR to scale its employee philanthropy and CSR efforts by enabling employee champions and reducing the coordination and data gathering burden.

Leveraging a cloud platform such as Philanthropy Cloud helps HR professionals democratize CSR the way Salesforce democratized CRM, putting the power in the hands of employees. Taking a new philosophical approach to employee and corporate giving – enabled by Philanthropy Cloud – empowers HR to lead from behind, letting employee contributions shine while increasing their company’s social and community impact.

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