

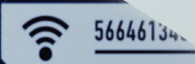
CORPORATE VOLUNTEERING, GIVING AND GRANTS TECHNOLOGY REVIEW

PRODUCED BY THE RW INSTITUTE IN PARTNERSHIP WITH THE BILL & MELINDA GATES FOUNDATION WITH SUPPORT FROM THE FOUNDATION FOR THE CAROLINAS AND E4E RELIEF



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FOREWORD

Since the release of the 1st edition of the *Corporate Volunteering, Giving and Grants Technology Review* in November 2019, significant developments have taken place in the Corporate Citizenship technology sector and the broader sociopolitical context in which these platforms operate.

Many companies shifted to virtual volunteering in response to the global pandemic, which up until early in 2020 was viewed by most community investment managers as a “nice to have” add-on rather than a serious tactic to achieve broader Corporate Social Responsibility (CSR) goals. In Q1 of 2021, **CECP reported** that of 250+ companies surveyed, 49% claim to have created a virtual volunteering program from scratch. These companies represent 36.6 billion dollars in community investments and 21 million volunteer hours. The nonprofit sector, by contrast, had neither the time nor resources to respond with equal investment. Despite more than 100 hours of hyper focused research, the RW Institute found merely 964 nonprofits with a formal approach to virtual volunteering, a strikingly low number standing in stark contrast to online reports suggesting there are close to 50,000 opportunities available globally. Many of the posted virtual volunteering opportunities were either outdated or unviable, squandering heavy private sector investments and millions of potential volunteer hours to support nonprofits through opportunities that do not exist¹. Compounding the disconnect between the private sector’s priorities and volunteer opportunities is the ongoing lack of investment in the capacity of the nonprofit sector to receive employee volunteers.

In an effort to close this gap, capacity building organizations such as **Common Impact**, the **Taproot Foundation** and **TechSoup Global** continue to advocate for the critical role of skills-based volunteering investments in the nonprofit sector. These and other organizations have produced helpful resources to inform and guide skills-based volunteering design, management, and measurement. **VolunteerMatch** offers both the ability to find virtual volunteering opportunities as well as **resources specific to nonprofits** that help with adjustments to new demands from corporate partners to drive engagement in online volunteering. Additionally, many of the technology platforms featured in this review provide guidance on how to engage employees in virtual experiences (COVID-19: 42%) introduced new functionality (COVID-19: 16%, social unrest: 21%), reconfigured platforms to improve aspects of equity and inclusion (social unrest: 25%), and improved access to giving and volunteering opportunities. Yet without significant investments in the nonprofit partner’s capacity to adapt alongside them, these interventions may yield limited impact in the long term.

As predicted in the 2020 edition of this review, the Corporate Citizenship technology market has simultaneously expanded with new players and consolidated existing solutions through mergers and acquisitions. What was once a niche technology market absorbed over \$3 billion in new investments over the past 18 months, far outpacing **opinions of industry experts** who had estimated the total valuation of the market to reach \$1.4 billion by 2027. This massive, lightning-fast growth places the current market value somewhere between \$8-10 billion, up dramatically from \$691.8 million in 2019.



Sustaining and growing the private sector's investment of human and financial capital into communities through giving, grantmaking, and volunteering requires perpetually improving technology solutions, which must be adaptive to volatile sociopolitical landscapes. Many companies covered in this year's edition of the review have worked tirelessly to meet these challenges, and we are better for their gargantuan efforts, resolve, and ingenuity. But companies and solution providers are investing massively to ensure there is capacity to deliver the promised value of corporate citizenship actions, and similar investments on the receiving side of the community investment partnership have been insubstantial by comparison.

How then do we reconcile the difference between the growing resources of the "helper" and those organizations and communities needing "help"? A critical step forward is for companies to invest with intention in the behaviors of employees allowing these powerful platforms to function as they were intended. Despite great giving and volunteering technology, an estimated \$4-7 billion of matching funds **go unclaimed each year**. Additionally, employee volunteering participation rates have not budged from 30-34% **since 2015**. All this despite exponentially more companies offering incentives such as paid time off (PTO) to volunteer (see: **CECP's Giving in Numbers**). To put it in context, in 2015 a mere six of ten companies offered PTO to volunteer; as of 2020, 90% offer the same.

This year, with this new and revealing research, it has become clear that the private sector's investments are trending in the right direction – but they're not yet there. The robust technology sector that facilitates those investments is also a positive development – but also remains not enough. Engaging employees at deeper levels of commitment is the uncharted territory that has the potential to unlock billions of dollars and provide the critical skills non-profit organizations and their communities need. We invite our readers to explore this year's review with this perspective in mind.

Respectfully,

Chris Jarvis, Executive Director, RW Institute





Compassion is our Currency

Employee Relief Matters

As a company, your employees are your greatest investment. Partnering with E4E Relief offers a charitable business solution to support your employees when they need you most. E4E Relief rapidly delivers financial grants to your employees who have an unexpected crisis.

Our relief programs help your employees prevent short-term needs from having long-term consequences and fosters employee engagement through charitable donations to assist fellow employees in times of crisis.



73%

of grant applicants say their relief program made them feel more positively towards their employer



27%

of grant recipients were able to immediately direct more of their attention to their work



76%

of grant recipients avoided at least one negative event, such as late fees on a bill, eviction or foreclosure notice, or shutoff of services or utilities

*According to E4E Relief 2019 & 2020 Impact Surveys, research conducted by Canary on behalf of E4E Relief

How Employee Relief Programs Work

- ▶ Company establishes charitable, company-specific fund at E4E Relief, 501(c)(3) Public Charity
- ▶ E4E Relief grantmaking policy, guided by IRS guidelines, informs company program and is vetted by external tax & legal counsel
- ▶ The program provides cash grant awards directly to your employees based on qualifying criteria established by your company
- ▶ E4E Relief provides an equitable and compliant relief program through 3rd party consultation and management
- ▶ Company, employees, foundation and others may donate to the fund

The E4E Relief Difference

We recently marked 20 years of providing employee relief programs. Our **best-in-class customer and applicant experience, transparent operations, readiness plans, and impact-driven programs** offer organizations and employees a compassionate response to crisis. Watch this [video](#) to learn more about the E4E Relief Difference.

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Connect



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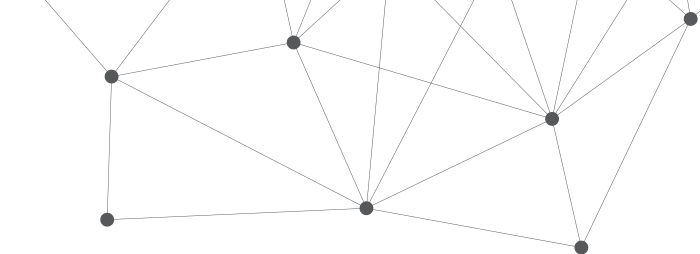
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HOW TO USE THIS REPORT

The Corporate Volunteering, Giving and Grants Technology Review is designed to help program managers and decision makers right-size investments in volunteering, giving and grants technology, as well as promote the effective selection, evaluation, implementation, and adoption of these technologies alongside the programs they support.

- + **Section 1: Market Analysis** sets the stage for a review of solutions. Read to understand the most up-to-date perspective of the field, including recent developments, prominent trends, and insights related to COVID-19 and the Black Lives Matter movement and technology.
- + **Section 2: Featured Solutions** provides a high-level overview of 41 platforms on the basis of features and functionality, technology specifications, and vendor support.
- + **Section 3: Solution Spotlights** examines 20 of the 41 platforms on a microscopic level of detail.
- + **Section 4: What to Expect** for key considerations during the procurement, selection, implementation, and adoption of a technology platform.

Having an informed understanding of the technology market is but the first step in determining which solution is right for your organization. The data in this report is collected from existing knowledge bases, solution providers, industry thought leaders, executive leaders, practitioners, and end-users. When using this report, please consider the Evaluation Keys and Definitions provided for the clearest understanding of the data presented.

This report seeks in no way to rank technology solutions or solution providers in their approach to volunteering, giving and grants. What RWI advises regarding the selection of a platform is not exclusive to this report and its contents, and it is intended only to inform and provide a greater level of knowledge and awareness of the technology market and the key considerations in successfully choosing, buying, and adopting technology in support of corporate citizenship programs.



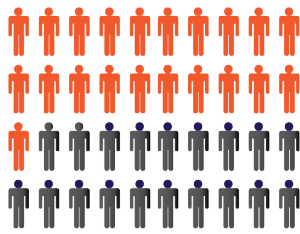
This report is produced by the RW Institute (RWI) and sponsored by the institute's core partner, the Bill & Melinda Gates Foundation, as well Foundation For The Carolinas and E4E Relief. RWI is a think tank founded by Realized Worth that focuses entirely on broad efforts to advance the practice and theory of corporate citizenship through innovative projects, research, analysis, and public policy advocacy. RWI and Realized Worth do not own, endorse, or partner with any workplace giving platform in an effort to deliver a wholly unbiased report.

OUR APPROACH

The Corporate Volunteering, Giving and Grants Technology Review provides a 360-degree view of the technology market and is based on extensive research efforts with a global reach.



A MARKET SCAN RESULTED IN THE COLLECTION OF **64 KNOWN SOLUTION PROVIDERS**, RESPECTIVELY HEADQUARTERED ACROSS **13 COUNTRIES AND 5 CONTINENTS**



21

Solution providers completed a basic product survey

20

Solution providers completed a deep-dive product survey and provided a product demonstration

41

SOLUTION PROVIDERS AGREED TO PARTICIPATE IN OUR RESEARCH



6 solution provider Executives/CEOs spoke with about the vision for their platforms, the technology market, & the future of corporate citizenship



7 CSR executives spoke with us about their insights on the CSR technology market and the future of corporate citizenship

104 PRACTITIONERS

Completed a survey about their experience in volunteering, giving and grants technology



ACROSS 101 COMPANIES



13 COUNTRIES



3.6M EMPLOYEES REPRESENTED



93 END-USERS



ACROSS 84 COMPANIES



IN 14 COUNTRIES

Completed a survey about their experience with volunteering, giving and grants platforms at their companies

This report's findings are by no means exhaustive. There is more work to be done to promote understanding of the volunteering, giving and grants technology market and educate the industry on how to best leverage existing technologies to move corporate citizenship efforts forward.



Working Together, Giving Together

Corporate philanthropy can change lives and strengthen the communities where we work, live and do business.

Foundation For The Carolinas' Center for Corporate Philanthropy partners with generous companies of all sizes. We develop giving strategies and manage charitable funds that achieve your unique philanthropic and business goals.

Whether your goal is to help your employees in times of hardship, address urgent community needs or support your team's favorite nonprofits, FFTC offers turn-key corporate solutions. We make charitable giving easy, efficient, and effective.

To learn how your company can leverage FFTC's philanthropic expertise, charitable funds, grantmaking support and other resources, visit www.ffc.org/corporate.

**FOUNDATION FOR
THE CAROLINAS**

www.ffc.org | 704.998.6412 | philanthropy@ffc.org



SECTION 01
MARKET ANALYSIS

THE MOST UP-TO-DATE PERSPECTIVE
OF THE VOLUNTEERING, GIVING AND
GRANTS TECHNOLOGY MARKET



MARKET OVERVIEW

Since the last edition of the Technology Review, corporate citizenship programs and practitioners around the world have been newly challenged with responding to events surrounding COVID-19, global social unrest, and environmental devastation of incomprehensible scale. As employees, consumers, and the public at large demanded more of organizations, cutting edge technology emerged to enable a refreshingly different and increasingly distributed method of operation.

As program demands and complexity increased in the global sphere of corporate citizenship, as did the expectation for technology solutions to not only keep pace, but to continually demonstrate their value. Attempting to bridge the gap between technical solutions and program requirements, solution vendors answered the demand, expanding their role from technical support and reaching further in the direction of strategic partnership.

Market consolidation continued with major acquisitions and sustained investment amongst the largest vendors, with HG Capital acquiring a majority stake in Benevity², America's Charities acquiring Causecast³, and Apax Funds acquiring CyberGrants⁴ to merge it with a previous acquisition in EveryAction⁵. Before the Apax Funds acquisition, EveryAction has made six of its own acquisitions between 2019 and 2021, acquiring Salsa Labs, GiveGab, Mobilize, BSD Tools, DonorTrends, and ActionKit in that timeframe⁶.

Between Benevity, America's Charities, Blackbaud, and the newly expanded EveryAction, and with more acquisitions on the horizon, the value of the corporate citizenship technology market shows no limits. All signs indicate an almost insatiable appetite to both capture a larger share of the existing market for Corporate Citizenship technology, and to catalyze a dramatically expanded field—essentially a bigger oven baking a bigger pie.

During Blackbaud's most recent earnings call⁷, company president Michael Gianoni reflected on the effects of the pandemic, reiterating a future of acquisitions:

"We have a strong historical track record of driving inorganic revenue growth through M&A. With last year being an exception, given our primary focus was on our employees, our customers and preserving liquidity during the pandemic. We are now actively evaluating opportunities, as acquisitions remain an important element of our growth strategy going forward. I'll remind you that with the combination of organic growth and M&A, we have a history of double-digit revenue growth."

“Technology is an enabler of transparency and accountability. For companies to be trusted, technology will have to play a role in empowering a diverse set of people, meet them where they are, and enable them to lead those movements.”

SONA KHOSLA
CHIEF IMPACT OFFICER
BENEVITY

While not explicitly stating it, Benevity made similar overtures, signaling a future of acquisition with two executive roles including VP, Product and Director, and Corporate Development, including the following job responsibilities:

- + Establish a strategic plan that incorporates inorganic growth in coordination with corporate development where applicable. Support efforts to successfully incorporate partnership, integration, and M&A opportunities.
- + Identify and evaluate strategic acquisitions/partnership opportunities and make recommendations that accelerate Benevity’s long term strategic plan.
- + Lead and coordinate the process for M&A throughout all of the relevant phases – such as opportunity assessment, business case development, evaluation of strategic fit, valuation analysis, due diligence, execution and integration – ensuring that all move expediently and in a coordinated manner, that deliverables are clearly defined and all relevant stakeholders are kept adequately informed.
- + Perform financial analysis of potential investment opportunities, including developing business cases, financial impact assessments, and valuation analyses. Work closely with Finance to coordinate overall analysis on business impacts and to prepare pro forma financial outputs. Draw conclusions from analysis and make recommendations accordingly.
- + Lead post-transaction integration efforts.

Benevity eventually announced the hiring of a Chief Product Officer.⁸

Throughout our analysis we also observed market consolidation. Although our review looked at nearly 70 solutions, executive, practitioner, and end-user respondents only represent about a dozen vendors, with almost half representing only two vendors. Excluding those with homegrown or bespoke solutions, most companies captured in our surveys were represented by only a handful of solution vendors.

The implications of acquisitions and consolidations for buyers and practitioners can vary depending on one’s perspective. Solution vendors will say that an infusion of funds will accelerate development of functionality and capability enhancement or the benefits of integration of products under the same ownership. Another benefit is the expanded network of clients (and practitioners) using the same solution and creating a powerful network of expertise. Global presence and experience with complex implementations is another selling point, especially for organizations with densely layered and geographically-distributed programs.

Yet, customers must also deal with the downside of these acquisitions and consolidations. Practitioners surveyed in this review spoke of disruption, change of service levels, and the need to re-brand communications. In open-ended responses to our survey, many practitioners cited acquisition as their reason for switching (or “inorganic growth”), and the less than stellar impacts on customer service and the partnership relationship.

Ultimately, M&A activity is a hallmark of a maturing industry, where a handful of vendors capture the greater part of a market, crowding out smaller vendors within the all-in-one market and forcing them to concentrate on niches, spinning out new segments and sub-segments as best-of-breed solutions. It would be feasible to expect that corporate citizenship solution vendors would look to swallow up standalone solutions in data-rich segments supporting Environmental, Social and Corporate Governance (ESG) programs and enterprise sustainability.

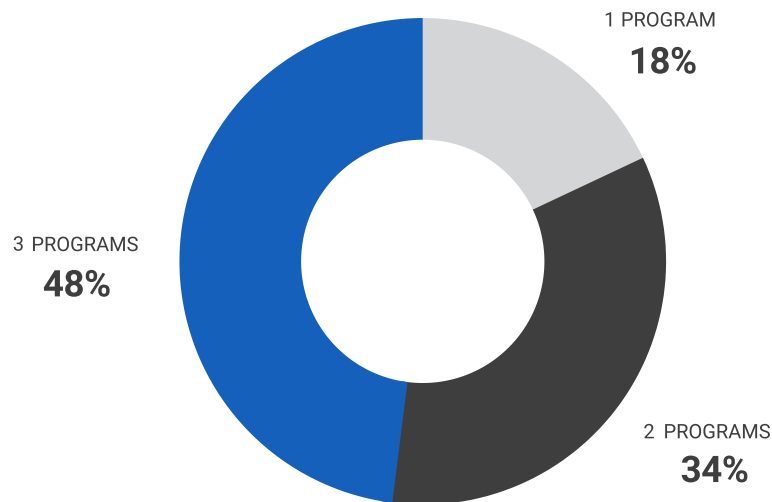
Some of the activity is already shifting to strategic partnerships in specific areas as new vendors attempt to accelerate entry into the market and existing vendors look to outsource commoditized functionality. A prime example is the integration of Blackbaud’s YourCause with GlobalGiving Atlas, providing YourCause access to a sizable database of NGOs, charities, and nonprofit organizations through GlobalGiving.⁹ We anticipate similar partnerships in areas like channel optimization, increased use of natural language processing for opportunities and matching, payment and processing, and employee engagement.

Concurrently, the presence and maturity of major vendors amplifies the overall message regarding the value and importance of corporate citizenship as both a tool for good and as a means in which organizations can fulfill the role employees and the public have ascribed to them. This means fully engaged employees as part of their corporate identity, developed leaders, and – ideally – actual real world impact.

TREND: CORPORATE CITIZENSHIP BECOMING INCREASINGLY COMPLEX OR VARIED

Almost half of respondents indicated that they are administering strategies for workplace giving, volunteering, and grantmaking in their organization. This indicates a growing breadth of functionality required from the accompanying tools and solutions needing to accommodate requirements from all three areas. Only about 20% of respondents indicated running just one of the three program areas.

NUMBER OF PROGRAMS ADMINISTERED BY PRACTITIONERS



Worth noting is that while the number of program areas being managed represents variety, it may not necessarily represent complexity, with any one program potentially having significantly more focus or investment than another. However, the scope of program elements – regardless of their complexity – may require practitioners to look at a suite of solutions, as a single platform may not be sufficient in accommodating their needs across all three areas.

TREND: WHAT'S IN A NAME?

When asked about what department practitioners are located in operationally, there were almost as many departments as there were respondents (90 respondents in 64 uniquely named departments). This demonstrates just how diverse the practitioner audience is in function, background, and training. Moreover, the wide range of responses demonstrates the sector has not yet arrived at a consensus regarding where volunteering, giving, and grantmaking activities should reside.

Responses included CSR, HR, Legal, Corporate Citizenship, Community Impact, Marketing, Foundation, Community Investment, Community Relations, Sustainability, Public Affairs, and others. Any given practitioner's standing in an organization could be an issue of nomenclature, where the goals and objectives are consistent despite the variation in name, but there is an identity question that could influence the approach to the selection, evaluation, and adoption of technology. For solution vendors, defining appropriate messaging must take into consideration the huge range of audiences, as well as each group's underlying measures of success.

In the early days, most CSR Departments evolved out of HR or PR and Comms to create their own units. Consequently, they focused on 'checking the box' for offering employee engagement programs and publishing periodic, external impact reports. Today's opportunity for socially beneficial business is much bigger. Stakeholders measure every company against their ideal standard of excellence within the world at large, and each can instantly publish evidence of moments when a company's performance appears substandard. The CSR Department we value empowers every party to champion the inclusive identity of the company and to extend its constructive legacy."

SAM FANKUCHEN, FOUNDER
GOLDEN

Scanning the marketing materials of solution vendors similarly highlights an evolving terminology. Technologies we have referred to as giving, volunteering, and grantmaking solutions in our report are also referred to as corporate purpose software, "impact-as-a-service" platforms, social responsibility and employee engagement software, or simply CSR software.

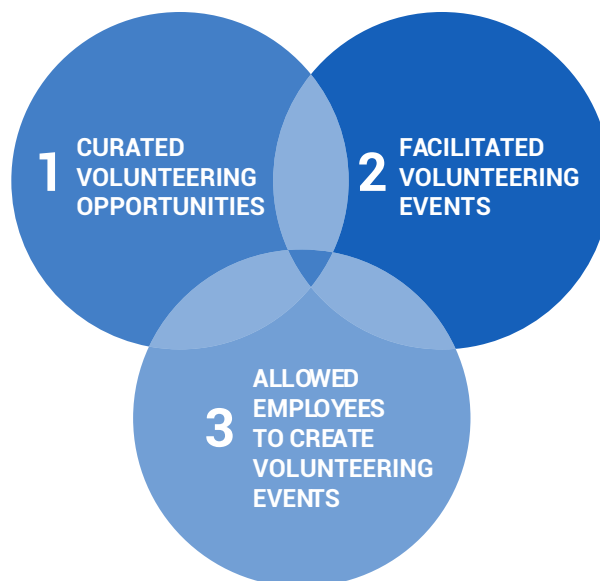
TREND: RESPONSE TO COVID-19 AND SOCIAL UNREST

The ongoing global pandemic coupled with multiple crises of social injustice saw corporate citizenship practitioners attempt to maintain giving momentum and grantmaking work by turning to their technology providers for advice and guidance about engaging remote employees. When asked about the effect of COVID-19 on giving, volunteering, and grantmaking activity, 64% of respondents indicated a decrease in volunteering activity, 50% saw an increase in giving, and 30% saw an increase in grantmaking.

These findings correspond to reporting by both solution providers and third-party organizations supporting giving and grantmaking. Blackbaud reported that COVID-19 and social justice received 83% of the \$9 million+ in disaster donations given by their customers¹⁰. CAF America has conducted numerous surveys producing several reports on the topic of the pandemic and social unrest and found that "one-quarter of the corporations surveyed are giving 10-25% more, and over 12% are giving over 50% more" due to these global concerns¹¹. CECP is reporting that in 2020, Covid-19 became a significant priority with "47% of companies stated their community investment budget increased in 2020 due to Covid-19 response."¹²

Contrasting the increase in giving, a decline in employee volunteering is to be expected during a pandemic. Blackbaud noted that among their customers, "the giving engagement rate was almost 6 times higher than the volunteer engagement rate," while Volunteer Canada reported that 55% of surveyed organizations showed a decrease in volunteering.¹³ Many CSR departments turned to online or virtual volunteering as the lone feasible option to maintain employee volunteering activity. As previously noted, many CSR managers relied on their technology partner for support throughout the often awkward transition to virtual volunteering. When asked about how technology helped support activities during COVID-19, over half of respondents claim to have used platforms to curate volunteering opportunities, 40% said they used their platform to facilitate volunteering events, and close to 50% used it to allow employees to create volunteering events. These findings are a significant improvement over findings from earlier in the pandemic, when CECP reported that only 6% of their surveyed companies worked with technology providers to support virtual volunteering¹⁴.

TOP 3 WAYS TECHNOLOGY HELPED SUPPORT ACTIVITIES DURING COVID-19

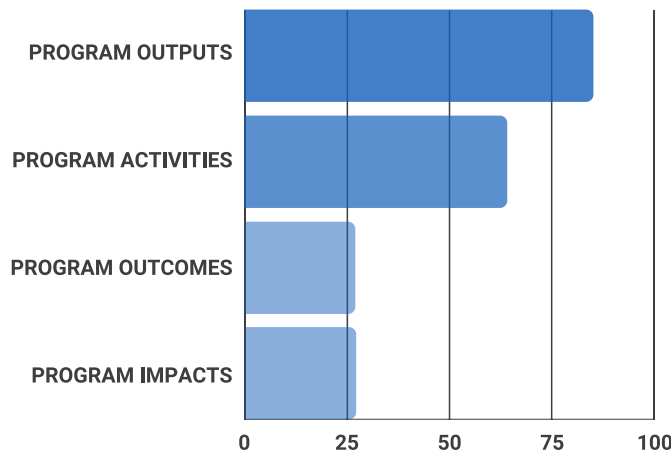


Solution vendors bent over backwards to meet the demanding sociopolitical unease during COVID-19. And in response to social unrest, they provided advice on how to drive adoption with virtual volunteering for employees (COVID-19: 42%) introduced new functionality (COVID-19: 16% social unrest: 21%), implemented changes to platforms with an eye towards equity and inclusion (social unrest: 25%), and improved broader access to giving and volunteering opportunities. As a result, an overwhelming majority (89%) of end-user respondents (employees participating in giving and volunteering) agreed that their company’s giving and volunteering platform helped them contribute to their communities during COVID-19. But despite a consistent result, when scrutinizing social unrest, results showed marginally more polarization with 80% agreeing that their company’s platform helped them contribute to their community in response events of social unrest, leaving a fifth feeling otherwise.¹⁵

TREND: APPETITE FOR DATA, REPORTING, AND VISUALIZATION

When looking at which of these measures were reported to leadership, practitioners ranked them similarly to what they measure.

IN DESCENDING ORDER, THE MEASURES MOST REPORTED TO LEADERSHIP WERE:



“We need technology to ensure that we create transparency in KPIs, but more so that it gives us a level of confidence that the figures we are reporting are real ... as soon as you have technology involved, it gives everyone a level of confidence that what the system is reporting is probably more accurate than if reported randomly.”

ALEXANDRA VAN DER PLOEG
 HEAD OF CORPORATE SOCIAL
 RESPONSIBILITY
SAP

In practitioner executive interviews, leaders expressed difficulties with measuring outcomes and impacts (both within and outside of technology), even though those measures were in high demand and increasingly important. Measuring the medium to long-term impacts of programs was seen as overly complex due to the challenges associated with setting up, funding, maintaining, and validating longitudinal studies.

Leaders at the top levels of the organization – unlike hands-on practitioners – were more interested in the impact narrative, outcomes, and the level of employee engagement, than the actual measures of activity or outputs (e.g. volunteer hours, meals served, etc.), which are often seen as “table stakes”.

For employee engagement in particular, the connection between Corporate Citizenship programs and engagement is starting to gain momentum. A Benevity Labs’ Goodness Engagement Study from 2018 found that turnover was reduced by 57% among employees engaging in both giving and volunteering activities.¹⁶ In another report, Community Involvement 2021, by Boston College’s Center for Corporate Citizenship, found that for companies that measured the correlation, employees who volunteered had higher engagement scores.¹⁷

Leaders also wanted to know what role corporate citizenship played in leadership development. It was difficult to ascertain whether leadership development and succession planning required engagement in those programs or if those already engaged made for a natural candidate pool.

“With ESG, clients say we have more work to do, more reports to produce. They want to have data, and the data organized, and available. The data standards in terms of ESG are lacking and are not helping the landscape. Everyone is talking about definitions differently, and companies end up using multiple reporting standards.”

RUI RAMOS
FOUNDER
ESOLIDAR

When looking at participation levels, leaders wanted to see a more significant portion of the workforce represented in giving and volunteering activities, as opposed to a higher overall output produced by a smaller, more active group. From that standpoint, program outputs could be lower if they capture a larger percentage of the workforce, suggesting that “activating” dormant users and focusing on that group was more effective than drawing on the group that was already active and engaged.

Despite the interest in measures looking at workforce participation in corporate citizenship, most practitioners could not accurately identify employees as being engaged (3+ transactions/year), occasional (1-2 transactions/year), or dormant/inactive users (no logged transactions). Some of the reasons for the lack of consistency in responses could include varying definitions of active and engaged users, an assortment of tools being used (i.e. grantmaking solutions may have a few specialized users, all of whom are actively engaged as part of their day-to-day responsibilities), and gaps in technical or functional reporting capabilities.

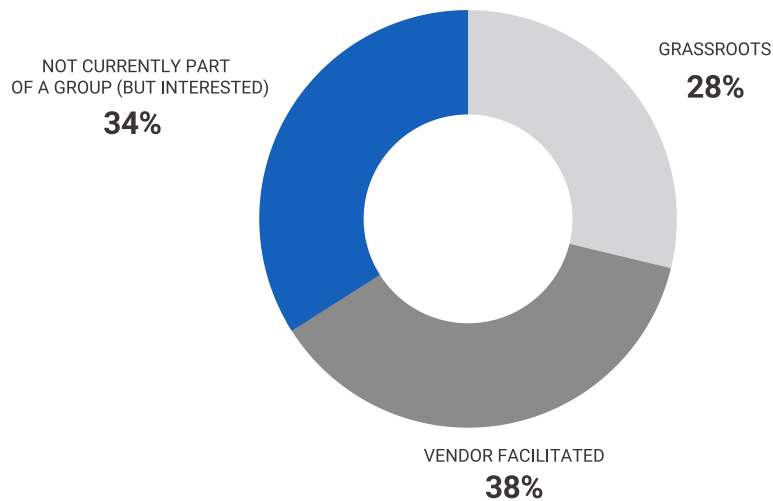
Technology leaders, on the other hand, emphasized that the level of reporting and analytics functionality in their platforms exceeded the data literacy and the ability of most organizations to take advantage, but also highlighted the evolution beyond basic reporting.

Both practitioners and vendors spoke of a significant demand for reporting, KPIs, metrics, and accompanying visualization. They agreed that solutions allowed for reporting to become more consistent, transparent, and fostered confidence.

Practitioners expressed concerns about potential regulation of ESG and its impact on compliance reporting. Preparedness for regulation and a solution that could accommodate current and future needs were seen as essential needs.

TREND: EXPERT NETWORKS AND USER GROUPS

Almost two-thirds of practitioner respondents indicated being part of either grassroots (28%) or vendor facilitated (38%) user group, and a third suggested that while they were not currently a part of a user group, they would join if they were made aware of one.



There is a surprisingly low level of user-group participation for those identifying as having a sizable platform. This could indicate that practitioners are not taking advantage of available peer resources and expertise, are unaware of available opportunities to connect, and may not be maximizing the tools and services available to them. For solution vendors, low levels of user-group participation may represent a lost opportunity to create stronger connections, better promote existing forums for clients to connect, and secure meaningful feedback.

Practitioners expressed enthusiasm for the ability to connect with others with similar configurations, share lessons learned, and to collectively advocate for solution enhancements and new features.

TREND: VIRTUAL VS. IN-PERSON VOLUNTEERING

While donating money during a pandemic was affected by newly emerging priorities and political turmoil, volunteering suffered from a lack of infrastructure. Previous discussions about virtual volunteering have been peripheral at best. According to the CECF's 2021 edition of the Giving In Numbers report, in 2020, 87% of companies surveyed offered a domestic version of virtual volunteering while 47% offered it to international employees, an increase from 38% domestically and 19% internationally from 2018¹⁸. In the initial months of the pandemic, the decline in employee volunteering was almost universal. The immediate issue was the difficulty in finding opportunities to volunteer online. Fidelity reports that more than half of their donors had not participated in virtual or remote volunteering because "they have never heard of virtual volunteerism and aren't interested, and nearly two-thirds say they don't know how to seek out remote volunteer roles."¹⁹

Even as the opportunities to volunteer online began to slowly increase, employees who have participated in virtual volunteerism during the pandemic are split in their reactions. While 38 percent are mostly or very satisfied with their virtual experience, 27 percent are only a little or not at all satisfied. Given the lack of attention to this medium for employee volunteering, it stands to reason that most companies and their nonprofit partners are ill-equipped to provide robust and meaningful online volunteering experiences. When comparing virtual and in-person volunteer experiences, 98% of end-user respondents rated the experience of volunteering at an event in-person as **good** or **very good**. Interestingly, although very few employees reported trying virtual volunteering, only 3 out of 4 employees rated virtual volunteering at an event or on a project as good or very good.

COMPARING VIRTUAL AND IN-PERSON VOLUNTEER EXPERIENCES

IN PERSON

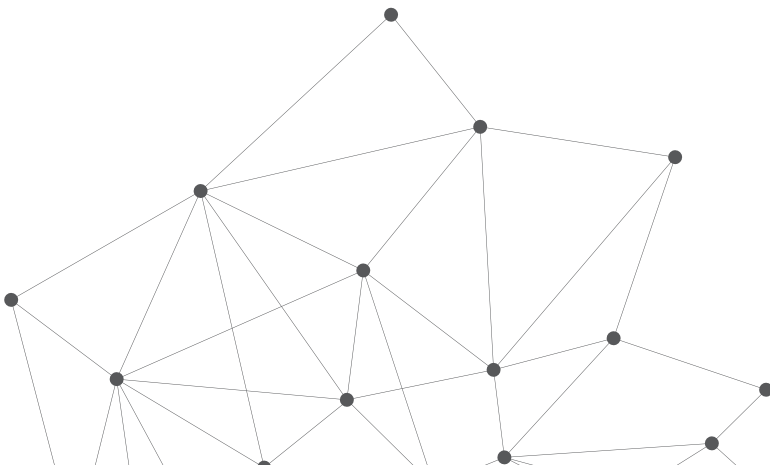
98% Of end-user respondents rated the experience of volunteering at an event in-person as good or very good

95% Rated the experience of volunteering at scheduled or occasional hours in person as good or very good

VIRTUALLY

75% Rated virtual volunteering at an event or on a project as good or very good
(This category had the largest number of respondents indicating they did not participate in this kind of volunteering)

81% Rated virtual volunteering on scheduled or occasional hours as good or very good



Further investigation is required to properly understand the sentiment gap between virtual and in-person volunteer experiences, and the potential reasons contributing to ratings in the fair and poor range. Virtual or online volunteering has its advantages, as it removes standard barriers, neutralizing a person's physical ability, relative proximity, and certain scheduling obstacles, but the practice needs to address concerns expressed by both volunteers and nonprofits, such as:

- + Poor understanding and use of online collaboration tools
- + Significant lack of opportunities in the online volunteering sphere
- + The ongoing lack of investment in nonprofit capacity to offer these types of programs
- + A perceived 'distance' from the volunteering work and the community being served
- + The perception of a lack of value in many online volunteering actions

Little to no training for employee volunteer champions, ambassadors or leaders on how to find opportunities, manage them, and report the outcomes

The practitioners, leaders, and vendor executives interviewed for this report view virtual volunteering as supplemental rather than fully replacing in-person volunteering. However, they also believe the current emphasis on virtual volunteering will outlast the pandemic.

“Personal contact is very important, virtual calls are there to stay, but physical and in-person interactions will come back. I can imagine a transition to more of a hybrid model where it's a balance between the two.”

BOUDEWIJN WIJNANDS, FOUNDER,
DEEDMOB



SPECIAL FEATURE:

CASE STUDY



TECHNOLOGY SOLUTION PROVIDERS AND NATIONAL LEGISLATION: A VENDREDI CASE STUDY

What is the value of a company's investment of human capital in employee volunteering? This is a persistent problem challenging business executives and Corporate Social Responsibility (CSR) practitioners at companies of all sizes globally.

Over decades, myriad approaches to measurement have been developed to address aspects of this very issue. To gauge the efficiency and effectiveness of giving and volunteering programs, Realized Worth (RW) employs a measurement framework inclusive of outputs, outcomes and impacts for the community, the company, and the employees. Yet, RW's framework does not commodify the ROI of employee volunteering in digestible metrics as one might find in a financial report on human capital investments. Over a five-year period, IMPACT2030²⁰ developed a framework for "Measuring the Social Impact of Employee Volunteer Programs on the Sustainable Development Goals²¹" funded by Bank of America and led by True Impact.²² While the guide is helpful in aligning the investment of employee volunteering against achieving the SDGs, and even provides step-by-step guidance on determining the value of those investments, it still cannot meet the same criterion that is standard in financial reporting.

While such frameworks and tools are key to evaluating the overall return of employee volunteering, these valuations still fail to translate into data that drives and influences business decisions. In contrast to financial community investments, the fact that a company invested, for example, one million dollars in human capital might be interesting information, but it lacks materiality. More importantly, beyond being a vaguely interesting data point in a CSR report, it is generally irrelevant to stakeholders.

What is the value of the investment of human capital in employee volunteering? In order to effectively answer that question, we'll need new math. We need the kind of math that leads to valuation and reporting that stakeholders will find compelling.

The French model, "Mécénat de Compétences" or Skills Sponsorship,²³ may be a first step toward this new math. Article 238a of the French General Tax Code (CGI) stipulates that companies can make in-kind donations to nonprofits (inclusive of unpaid service of employees) to deliver skills to support the common good. These contributions must be made during work hours (requiring the company to have a "Paid Time Off" or "Manager Approval" policy for volunteering) and accept either the provision of services by the company (pro bono work) or employee volunteering. Companies are then able to apply for a tax reduction equal to 60% of the wage paid to the employee during that period.²⁴

In a recent interview, the Vendredi²⁵ team pointed out two key factors that motivated France to adopt Mécénat de Compétences as part of the nation's tax legislation:

First, the French nonprofit sector is comparatively large and well resourced. As of 2017, France had an estimated 1.5 million associations (nonprofit clubs and charities) representing a budget of €113 billion and about 3.3% of GDP.²⁶ This is impressive given that the number of registered nonprofits in the USA is similar with just over 1.5 million organizations. France has one-third the population of the USA.²⁷

The second factor has to do with French culture. Over the years, various French government administrations have strongly supported the nonprofit sector providing generous incentives and recognition for private sector commitments of long term partnerships and support.

The Vendredi team did point out that many larger or more established companies in France are lagging behind their peers in the USA, Canada, Australia and the UK. Offering paid time off to volunteer is not a formal policy at most companies. Start-ups with younger leadership stand in contrast to this reality; they tend to be proactive with purpose driven agendas. However, the French social impact environment may be evolving as evidence points to more companies of all sizes becoming "greener" by reducing their carbon footprint and/or seeking certification as a B Corporations.²⁸

As a native French technology solution, Vendredi strategically focuses on promoting employee volunteering while raising awareness of the benefits of the Mécénat de Compétences legislation. Given Vendredi's partnership with over 1000 nonprofits in France and a growing footprint in Belgium, Spain, Germany, Italy, UK, and the Netherlands, news of this innovative approach to solidifying the value of employee volunteering as part of a resilient society²⁹ can be expected to spread across Europe. This is an excellent example of how technology solutions such as Vendredi can influence broader social constructs, bringing greater value to the field as they raise the bar on measuring the investment of human capital in employee volunteering.

A NUDGE TOWARDS THE BETTER USE OF CORPORATE CITIZENSHIP TECHNOLOGY

COMPANIES HAVE A LEADERSHIP ROLE IN SOCIAL AND ENVIRONMENTAL ISSUES

The private sector plays an increasingly influential role in shaping societal values. As stated in the 2019 Technology Review, "Governments, non-governmental organizations, investors and consumers are demanding leadership in the management of social and environmental issues related to a company's operations, sourcing, supply chain, production and sales." Since that statement was written, humanity endured a global pandemic, witnessed a new era of social unrest, and experienced terrifying evidence of the dangers of climate change. In such tumultuous times, it is not surprising that companies are taking responsibility for their influence in a new way, expanding past the scope of corporate operations and considering the broader societal implications of their role. While many senior business leaders have taken strong positions on issues of diversity, equity, inclusion, gender norms, remote work, liveable wages, healthcare and climate change, political and religious leaders have, in sharp contrast, are largely absent from the conversation. As a result, employees now view employers as their most trusted source of authority.

Edelman's 2021 Trust Barometer Report found that employers are the most trusted institution (77%) over NGO's (58%) Governments (56%) and the media (51%).³⁰ Notably, this perspective is not North American alone: "More than three-quarters of respondents said they have higher expectations of employers than three years ago, with especially high numbers in developing markets (India - 88 percent, Brazil - 81 percent)."³¹

Traditionally, the private sector addressed social and environmental issues through philanthropic contributions of financial and human capital. In the United States, total charitable giving reached a record of US\$ 471.44 billion in 2020³². This is a 3.8% increase (adjusted for inflation) over 2019. However, corporate giving was a drag on this increase having declined by 6.1% from the 2019 record of US\$ 21.09 billion down to \$16.88 billion in 2020. This reduction had little impact on overall giving as corporate contributions in the US represent only 4% of total dollars donated in 2020.

Financial contributions are only one type of resource available to members of the private sector that want to invest in their communities. Companies also have the option to provide nonfinancial community investments such as product donations, pro bono services, and employee volunteering. Interestingly, 2021 marks the first year the definition of nonfinancial contributions has been broadened further to include business expenses related to internal development such as DEI training, Health and Safety efforts, Labor relations and Human Rights. CECP's Giving in Numbers 2021 Edition refers to these business expenses as "Total Social Value", encompassing activities such as "socially driven internships, donation of digital assets, shared value, and impact investment."³³ While these activities should be applauded, counting them as "nonfinancial contributions" further blurs the line between basic good business and the traditional understanding of corporate philanthropy.

Given the history of greenwashing in the private sector, legitimizing corporate citizenship has never been more critical. To be perceived as authentic, companies need trustworthy, relatable, and accessible voices to validate social and environmental investments.

Expanding the definition of what 'community investment' includes potentially presents ethical dilemmas. On the one hand, stakeholders may push back with the observation that if companies count every 'responsible' business practice as 'community investment' the concept becomes somewhat meaningless (by counting everything we are saying nothing). On the other hand, the willingness of the private sector, especially large corporations, to place such a strong emphasis on responsible business and addressing social issues such as DEI allows for leadership in key areas that governments and religious leaders are unable or unwilling to take.

Companies need to validate their investments and intentions beyond memo's³⁴, roundtables³⁵ and marketing strategies.

Given the history of greenwashing in the private sector, legitimizing corporate citizenship has never been more critical. To be perceived as authentic, companies need trustworthy, relatable, and accessible voices to validate social and environmental investments.

EMPLOYEE ENGAGEMENT IN CORPORATE CITIZENSHIP IS THE KEY TO VALIDATING AUTHENTICITY

For the purposes of this article, "employee engagement" is defined as an employee's sense of connection to their company's corporate citizenship goals and the correlating positive action they choose to contribute to the shared outcomes. Achieving this kind of engagement requires employees to be invited into the process of understanding and achieving the desired changes. Most companies fail to achieve this degree of engagement because they approach their corporate citizenship strategy like a new business strategy: create the plan, work out the details, announce the objectives, and expect everyone to get on board. For a company to declare the objectives of corporate citizenship programs, launch a technology solution to support giving and volunteering or announce a purpose statement does not automatically mean everyone understands the objectives or will take action to achieve them.

Achieving engagement in corporate citizenship requires a Transformative Learning experience³⁶. When corporate citizenship activities move beyond transactional moments to transformative involvement, employees experience a deep, structural shift in thoughts, feelings, and actions. This shift of consciousness can dramatically and irreversibly alter our way of being in the world³⁷.

The Transformative approach to employee engagement in corporate citizenship elevates the employee to the role of "primary actor." Having participated in a transformative experience, the individual may now have a perspective transformation at a psychological level (changes in understanding the self), a convictional level (revision of belief systems) and behavioral (changes in real-world actions). This is a critical step to achieving real change across an enterprise as participation in corporate citizenship actions reinforces perspective changes which in turn authenticate the corporate citizenship strategy.

Engaging employees in citizenship as the primary actor allows them to play three critical roles in authenticating and legitimizing corporate community investment efforts. First, employees authenticate the CSR program based on their own experiences and knowledge. Their own experience within the program equips them to speak to the intentions and impact of the company's CSR actions and messages. Second, Transformative employee engagement opens the door to collective action at scale when addressing social and environmental issues. According to research, at least "25% of people need to take a stand before large-scale social change occurs. This idea of a social tipping point applies to standards in the workplace, and any type of movement or initiative"³⁸. Finally, employees become effective channels through which to communicate complex ideas across networks of both weak and strong ties in the workplace and in their communities³⁹.

While the research cannot yet completely explain the diffusion of behavior across large networks of people, it can be demonstrated that complex behaviors that may be perceived as risky⁴⁰ (such as adopting new behaviors related to DEI) spread differently than a simple contagion (such as hearing and sharing a joke). Sharing information across a network of weak ties is incredibly effective and the technology covered in this review is a key mechanism to support this dynamic. But with contagions such as behavior change, this approach can actually slow down adoption. Complex behavioral contagions require contact with multiple adopters. Understanding the dynamics of social networks, and the critical role of actors who can authenticate the message through personal experience, has powerful implications for the ways that company's view employee engagement in addressing social and environmental challenges both in the workplace and beyond.

CORPORATE CITIZENSHIP EFFORTS LACK THE CRITICAL MASS TO EFFECT REAL CHANGE

Given the role of the private sector in shaping social values and addressing climate change and the necessity of engaging employees as authenticators, activators and ambassadors, there are three historic barriers to overcome in corporate citizenship programs: low levels of awareness of workplace giving and volunteering programs, declining volunteering and giving rates in society and the "traditional" approaches to giving and volunteering which fail to account for the myriad ways human beings actually make decisions.

CSR managers have long considered how best to influence employees to participate in company volunteering and giving programs. Obviously, there are numerous reasons why employees decide whether to participate in corporate citizenship activities. For those who have already adopted volunteering as an expression of their personal values, the opportunity to access the company's paid-time-off policy, charitable gift-matching, and other incentives is viewed as a valuable benefit to employment. For those who volunteer fewer than 8 hours a year (about 70% of all employee volunteering), or not at all, these benefits are meaningless.

BARRIER 1: LOW AWARENESS

What are the best incentives and motivators to attract the attention of employees who have little to no experience in giving and volunteering with their employer (even though they may do so in their personal life)? Employees encounter corporate giving and volunteering messages in myriad ways and from various starting points.

The Technology Review's survey of employees who had participated in their company's volunteering and giving programs indicated they learned of these opportunities through email communications (82%), colleague invitations (61%), the company's technology portal (77%), social media, onboarding process for new hires (49%), United Way campaign promotions and team events (51%). The general perception is that this emphasis on communication is successful. Among companies using "purpose" as an organizing principle to guide value creation for society, 75% of CSR managers believe that almost all domestic employees (USA) know and can articulate the company's purpose.⁴¹

Yet, in Realized Worth's work with almost 100 companies over the past decade has revealed that, despite these efforts to raise awareness, most employees are either unaware of these programs or have significant knowledge gaps impeding them from learning more or participating. This appears to correlate with data reported in the 2021 Deloitte Workplace Giving Survey that in "just 37% of professionals who donated in 2020 leveraged a workplace giving program".⁴² In fact, the survey found that "more than one-third (34%) of these professionals had not donated in this way the year" and another "17% cited a lack of awareness that such a program existed at their company".

In Realized Worth's work with almost 100 companies over the past decade has revealed that, despite these efforts to raise awareness, most employees are either unaware of these programs or have significant knowledge gaps impeding them from learning more or participating.

BARRIER 2: DECLINE IN VOLUNTEERING AND GIVING RATES

Pre-pandemic giving data shows “just 49.6% of U.S. households made a charitable contribution in 2018, the latest year for which comprehensive data is available.” This is a significant decline as it is a “drop of almost 17 percentage points from 2000, when 66.2% of American households gave charitable donations.”⁴³ This decline in giving held true for all ethnic groups (Black, White, Hispanic and other) and only one-third could be attributed to changes in income and wealth. Una Osili, Ph.D., Associate Dean for Research and International Programs at the Indiana University Lilly Family School of Philanthropy noted, “We’ve seen a downward trend in households’ participation in giving since the Great Recession, but this is the first time that only half of U.S. households donated to charity. This new research offers clear evidence of a substantial decline in formal charitable giving rates prior to the unprecedented events and challenges of 2020.”⁴⁴

Given the data indicating stagnant workplace giving and volunteering participation rates⁴⁵, declining giving rates nationally in the US and the growing role of the private sector in addressing social and environmental concerns, it is critical that companies become more sophisticated and intentional as community investment leaders. Technology platforms have introduced much needed innovations such as better data management, improved choice, year-round activations and more. Still, these platforms are underutilized, leaving behind much of the value they represent. What is needed is a scientific understanding of how human beings make decisions in the real world, including their use of technology.

BARRIER 3: THE “TRADITIONAL” APPROACH TO GIVING AND VOLUNTEERING

The third barrier requires a breakthrough in choice architecture; the contexts in which employees make decisions. Corporate citizenship managers must move to understand and use behavioral science to account for the influence of emotions, social connections and the environment on decision-making. Human beings experience a phenomenon known as the value-action gap⁴⁶, whereby values and attitudes do not always correlate to actions. This is because human beings are heavily influenced by heuristics⁴⁷, biases and sense-making⁴⁸ that leads to irrational decisions. To put it simply, we cannot expect employees to participate in corporate citizenship simply because it makes rational sense that they would. “Rational sense” is not the criteria by which we make most decisions.

CURRENT MODELS OF EMPLOYEE GIVING AND VOLUNTEERING ARE NOT DESIGNED TO OVERCOME THESE BARRIERS

There are, of course, numerous reasons why most employees do not volunteer. These factors are typically systems-related and cause friction points in the decision-making process⁴⁹:

- + Poor, limited or inconsistent messaging
- + A lack of support from supervisors
- + Unclear objectives or suspicions about the true intent of the company’s program (is it just PR?)
- + Confusing sign-up processes
- + Technology with multiple friction points

Beyond these system related issues, there are also numerous unconscious decision-making processes leading employees to miss or decline the invitation in the first place. This unconscious decision-making occurs at the system 1 level of thinking. Daniel Kahneman, a psychologist and economist, produced groundbreaking research showing our brains have two operating systems which he called system 1 and system 2. Kahneman is the first psychologist to win the Nobel prize (2002) in economics for this work. One of Kahneman’s students, Richard Thaler, later won the Nobel Memorial Prize in Economic Sciences⁵⁰ for his contributions to behavioral economics in 2017 after publishing the best seller *Nudge: Improving Decisions About Health, Wealth, and Happiness*⁵¹ with Cass Sunstein⁵² in 2008.

The initial understandings of this concept were applied to economics and have since revolutionized classical economic theory. Since then, the field of behavioral science has established itself by exploring “the cognitive processes within organisms and the behavioral interactions between organisms in the natural world” with applications to “organizational behavior, operations research, consumer behavior, health, and media psychology”.⁵³

Behavioral science explains how individuals commonly make decisions in non-rational ways. Most of our decisions are automatic (System 1), influenced by a range of contextual factors as well as cognitive biases or heuristics.⁵⁴ Humans use over 180 individual cognitive biases⁵⁵ in decision making at the System 1 level. We do this to increase our efficient use of energy in daily life where we encounter any number of the following:

- + Too much information: We notice things already primed in memory or repeated often
- + Not enough meaning: We tend to find stories and data when looking at sparse data
- + The need to act fast: We favor simple-looking options and complete information over complex, ambiguous options
- + Lack of certainty about what we should remember: We store memories differently based on how they are experienced

A nudge is “a low-cost signal or procedure that encourages, from the planner’s point of view, a socially desirable change in behavior while preserving individual liberty.”

(THALER & SUNSTEIN, 2009)⁵⁶

The workplace giving and volunteering challenges plaguing practitioners can be addressed by the formal application of behavioral science to the field of corporate citizenship. By developing a series of interventions, known commonly as ‘nudges’, it becomes possible to take “advantage of the biases of type 1 processes by changing the external environment (choice architecture) to help a person get to the socially optimal outcome.”

BEHAVIORAL SCIENCE IS ALREADY NUDGING GIVERS

The application of behavioral science to giving is not a new idea. The Gates Foundation has partnered with Ideas42 “to bring a behavioral lens to individual giving - and investigate what is driving a “giving gap of more than \$250 billion in the US alone.⁵⁷ This work continues as part of the Better Giving Studio⁵⁸, supported by the Gates Giving By All team and the global design firm IDEO. More of these findings and insights can be found in the Ideas42 publication Best of Intentions: Using Behavioral Design to Unlock Charitable Giving⁵⁹ or the Benevity Lab report Bridging the Goodness Gap with Behavioral Science⁶⁰.

The RW Institute is proud to announce the launch of Nudge the Good, a project designed to use behavioral science to produce break-through results in corporate citizenship. As mentioned in the outset of this article, low participation in employee volunteering and declines in workplace giving⁶¹ have proven to be stubborn problems. Despite concerted efforts, for most companies, employee participation rates have been stuck at around 30% since CECP began tracking this data (2014 – 2020)⁶². As a result, an estimated USD \$4 - \$7 Billion in matching employee giving and volunteering funds go unclaimed each year⁶³. However, over 70% of people say their employer’s culture of giving or volunteerism is important to them, indicating a clear gap between what people say they think is important and what they do. Behavioral science insights⁶⁴ offer concrete solutions to close this gap and increase employee volunteerism rates.

NUDGE THE GOOD: A NEW APPROACH TO CORPORATE CITIZENSHIP

The Nudge the Good initiative applies methodologies and research from a variety of disciplines such as neuroscience, behavioral sciences, and transformative learning theory. The initial project scope focuses on nudging two categories of employees: a) Employees who do not typically participate in citizenship actions to participate for the first time, and b) Employees who participate in one or two actions per year to increase commitment and/or participation.

The RW Institute has partnered with Ideas42 to conduct randomized controlled trials (RCT's are the gold standard of rigorous evaluation) to test a series of interventions grounded in the strongest and most up-to-date academic evidence designed to take the partner context and constraints into account.

THE PROJECT:

- + Applies an evidence-based approach to demonstrate the use of corporate citizenship as experiential learning (on priority topics and issues, such as diversity, inclusion, and equity).
- + Utilizes a measurement framework to show developmental progress in both the program effectiveness and the employee's perspective.
- + Nudges employees towards prosocial behaviors in the workplace (and beyond) so that employees experience a "perspective transformation" in three dimensions: psychological (changes in understanding of the self), convictional (revision of belief systems), and behavioral (changes in lifestyle).
- + Explores the potential to track changes in the human brain over a multi-year period (as observed in fMRI scans with a select number of subjects)
- + Explores how choice architecture might present new citizenship behaviors to track, measure, and report.

| JOIN NUDGE THE GOOD

Phase one of Nudge the Good is currently concluding, having established the initial Nudge Unit and recruited the first set of participating organizations. Phase two involves: a) defining specific behavioral goals and determining the measurable target outcomes; b) understanding the context influencing behavioral goals, and c) designing feasible, evidence-based interventions to achieve behavioral goal. Following this phase, the Nudge Unit will oversee a set of RCTs to measure the impact of the nudges. Finally, the findings will be shared with partnering organizations and the community of practice followed by a broader release in the form of a solution report. The RWI Nudge Unit is comprised of leaders across multiple disciplines and industries:

- + Allyson Hewitt Vice President Impact at MaRS Discovery District
- + Sylvia Bartley BSc Hons PhD Sr. Global Director at The Medtronic Foundation | Author
- + Daniel Glisczinski Associate Professor, University of Minnesota, Minneapolis, Minnesota
- + Jerome Tennille, MSL, CVA, Manager, Social Impact & Volunteerism at Marriott International
- + Alexandra van der Ploeg, Corporate Social Responsibility at SAP
- + Janet Zagorin, Member, Board of Directors at Enchant Energy LLC
- + Sarah Welch, Vice President at ideas42
- + Jenny Moe , Corporate Social Responsibility Senior Manager at Target
- + Daniel Kamins, Director of Employee Engagement and Volunteerism at MetLife

- + Naheed Chowdhry, CEO at iWill Consulting
- + Lindsey Buss, Senior External Affairs Officer, Community Outreach at The World Bank
- + Rachel Madan, Director, Sustainability and Impact at Luminous
- + Alex Cunningham, Senior Employee Experience Advisor at Chevron
- + George Papaioannou, Global Director Internal and Leadership Communications at AbbVie
- + Michele Wong, Managing Director at MLW Consultancy
- + Chris Jarvis, Executive Director, RW Institute | Chief Strategy Officer, Realized Worth
- + Kostapanos Miliarexis, RW Institute Nudge the Good Unit Director

The RW Institute is pleased to announce the initial set of organizations participating in developing nudges and running trials:



The private sector plays an increasingly influential role in shaping societal values and the behaviors of citizens. To ensure this influence is positive for all stakeholders, companies cannot invest only in technology and the traditional community investment activities the technology enables. They must also invest in the human experience applying choice architecture, using behavioral insights and crafting transformative experiences. Companies need the trustworthy, relatable, and accessible voices who can validate their social and environmental investments - the voice of employees. Together, companies of all types have an opportunity to architect contexts in which employees make decisions and influence the powerful choices that have the potential to dramatically, irreversibly, and positively effect society.

| LEARN MORE ABOUT NUDGE THE GOOD

Check out the nudgethegood.com site.
 Contact us at nudgethegood@rw.institute.
 Learn [more about the RW Institute](#).



SECTION 02
FEATURED SOLUTIONS

A COMPARISON OF
41 TECHNOLOGY SOLUTIONS

FEATURED SOLUTIONS OVERVIEW

41 SOLUTIONS

This section of the report contains a review of **41 solutions** in the volunteering, giving and grants technology market. Solutions are categorized according to the corporate programs they support.

Navigate to the comparison most relevant to your program needs using the table below.

NOTE: Solution providers in **bold** are explored in more depth in **Section 3: Solution Spotlights**.

VOLUNTEERING, GIVING & GRANTS – 33

- + Alaya
- + **America's Charities Engage Powered by SmartSimple Cloud**
- + **Benevity**
- + Benojo
- + **Bright Funds**
- + **Communit eer**
- + **CyberGrants**
- + **GivePulse**
- + **Givinga**
- + **GivingForce**
- + **GivingTrax**
- + Good2Give
- + **GozAround**
- + HandsOn Connect
- + Optimy
- + **SmartSimple**
- + V2V
- + **WeSpire**
- + **YourCause + Blackbaud**

VOLUNTEERING & GIVING – 38

- + Aplanet
- + BeCollective
- + Catalyser
- + Deed
- + **eSolidar**
- + GetConnected (Galaxy Digital)
- + **Golden**
- + GoodUp
- + Millie
- + StratusLIVE
- + **Vendredi**

VOLUNTEERING – 42

- + **DeedMob**
- + Do Some Good
- + Helper Helper
- + NLvoorelkaar powered by the Social Care Network
- + YouGiveGoods
- + Yumana

GIVING & GRANTS – 45






- + Charity Vest
- + Do Some Good
- + GlobalGiving
- + Helper Helper
- + Innpactia
- + **Pinkaloo**
- + **RaiseNow**

RWI DOES NOT ADVISE A PLATFORM BE SELECTED BASED SOLELY ON WHAT THIS REPORT CONTAINS. THE INFORMATION HEREIN IS INTENDED ONLY TO PROVIDE A BASE OF KNOWLEDGE AND AWARENESS OF THE TECHNOLOGY MARKET AND KEY CONSIDERATIONS IN SUCCESSFULLY PROCURING AND IMPLEMENTING A PLATFORM. **READ MORE HERE.**

EVALUATION KEY



Solution providers are evaluated on the basis of **features and functionality**, **technology specifications** and **vendor support**. Note the following evaluation keys before reviewing featured solution provider comparisons.

FEATURES & FUNCTIONALITY

-  **Not available**
The solution provider does not offer this feature or functionality within the featured platform.
-  **Partially available**
The feature or functionality is not available in the platform but can be made partially or wholly available through customization.
-  **Basic functionality available**
The feature or functionality is available at a basic level relative to what is available in the market.* The capability is available out-of-the-box and/or with configuration only (i.e. no customization required).
-  **Advanced functionality available (customization)**
The feature or functionality is available at an advanced level relative to what is available in the market.* The capability is available at a basic level out-of-the-box and/or with configuration only and requires some customization to enhance.
-  **Advanced functionality available (configuration)**
The feature or functionality is available at an advanced level relative to what is available in the market.* The capability is available out-of-the-box and/or with configuration only (i.e. no customization required).



TECHNOLOGY SPECIFICATIONS & VENDOR SUPPORT

-  **Not available**
The solution provider does not offer this capability/vendor support option.
-  **Available**
The solution provider offers this capability/vendor support option.

LOOK OUT FOR the following that indicate exceptions to the evaluation keys above:



On the roadmap | Feature or functionality is not currently available for purchase or implementation but is on the roadmap for development in the next 1-12 months.



Third-party integration | Feature or functionality is provided by the vendor through integration with a third-party provider. Speak to the solution provider for more information.

*RWI analyst discretion.

DEFINITIONS

Featured solutions are compared on the following criteria related to volunteering, giving, grants, technology specifications and vendor support options.

REVIEW AND REFER BACK TO THE DEFINITIONS BELOW TO CLARIFY THE EXACT MEANING OF COMPARISON CRITERIA.

VOLUNTEERING	
Proprietary database of volunteer opportunities	Database of opportunities is owned, populated or curated, and managed by the solution provider (i.e., native to platform/not an integration). Database is accessible to employees upon platform implementation.
Opportunity database integration	Platform is integrated with a third-party source of volunteering opportunities, or clients are able to subscribe to third-party sources via the platform.
Opportunity and event search	Users can search for and view a calendar of volunteering opportunities and/or events within and outside of the company by various criteria (location, cause area, skills-based, etc.).
Volunteer event creation	Users can create volunteer opportunities for nonprofits recognized by the system. The creator becomes the opportunity owner/host or can assign an owner/host.
Volunteer event sign up	Users can sign up for events in the system. Sign-ups can be managed by a predetermined set of criteria (e.g., participant limits) and are provided with necessary event information (e.g., sign-up confirmation, event details).
Event creation and management	Ability to create an event associated with a volunteering opportunity (i.e., nonprofit), with the ability for individuals and/or teams to sign up, receive info, track hours, and search events by various criteria.
Native volunteering	Users are able to sign up for and participate in volunteer activities directly within the platform.
NPO access	Database of opportunities can be updated by social enterprises, nonprofits, and other partner organizations (i.e., those providing volunteering opportunities). Nonprofits have access to an external facing portal as a means to posting and managing volunteering events.
Log hours (self-report)	Volunteers are able to self-report hours for events initiated within the system and outside of the system (i.e., volunteer hours performed apart from their company).
Log hours (proxy)	Admins can enter and/or validate volunteer hours on behalf of employees.
PTO tracking (individual)	Users can enact and track volunteering paid-time-off (PTO). Manager approvals of PTO can be facilitated via the system.
PTO tracking (team)	Users, admins, or managers can enact and track volunteering paid-time-off (PTO) on an individual and/or team basis.
Dollars for Doers	Employee rewards bank accumulates automatically based on predefined dollar value per volunteer hour and reward thresholds. Functionality is integrated with the solution's giving module to allow employees to make donations from their rewards account to a nonprofit of choice.
System recommendations	Users are provided with volunteering opportunity recommendations based on information stored in the platform, which can include, but is not limited to interests, location, or skills. Recommendations are delivered to users in a variety of ways, including notifications, emails, and dashboard suggestions.
Competitions	Competitions can be hosted between individuals or groups by department, site, or another employee attribute. Competitions are configured to have a time bound goal and tracks against that goal.
Volunteer communities	Admins can create volunteer teams manually or by department, location, region, etc. Users are able to see, share, and interact with the volunteering activities of individuals and groups across the company.
Volunteer profile	Users have a personal profile which may include employee information, volunteering history, event schedule, cause interests, and skills.

VOLUNTEERING

Recognition and reward	Users and admins can recognize individuals or groups for their volunteering activity. Admins can facilitate (manually or automatically) the distribution of rewards to employees for volunteering activity.
Dashboards	Visually engaging presentation of relevant information to users and admins. This may include volunteer hours to date, upcoming events, competition progress or results, nonprofits helped, or balance of rewards bank.
Mapping to UN SDGs	Volunteering opportunities are linked to UN Sustainable Development Goals (SDGs). Users can specify SDG(s) of interest on their volunteer profile (if applicable). Admins can report on volunteering activity by SDG.

GIVING & MATCHING

Nonprofit database	Database of giving opportunities is available to users. The database is owned, populated or curated, and managed by the solution provider, client, or both.
Nonprofit search	Users can search for giving opportunities within and/or without the company using various criteria, such as location or cause area.
Nonprofit access/ functionality	Nonprofits have access to an external-facing portal as a means to post and manage giving opportunities and view relevant donor data.
Company foundation	A company foundation is a charitable entity within the system. Employees can interact with the foundation as specified by admins.
In-kind donations	Giving opportunities can be configured for in-kind donations and are logged.
Gift cards	Admins can distribute virtual or physical gift cards to employees as a reward for giving activity and/or to donate to a nonprofit on the individual's or company's behalf.
Payroll deductions	Integration with HR systems to facilitate payroll giving via automatic interface or deduction file.
International giving/ matching	Users can donate to international nonprofits and international employees can donate to local organizations. Donations can be made in any currency and the system is able to match those donations.
Disaster response (external)	Users and administrators can create giving opportunities related to disaster relief efforts within a community.
Disaster response (internal)	Users and administrators can create giving opportunities related to disaster relief efforts within the company (employee-to-employee, company-to-employee).
Processing and distribution	The solution provider processes and distributes donation funds. Funds are held for distribution in a legally protected, externally audited account separate from the provider's operations.
Vetting	Nonprofits are vetted automatically, meaning its 510c3 and/or OFAC/FATCA status is verified. Only nonprofits that match corporate requirements show up when employees search for giving opportunities.
Fundraising pages	Users and/or admins can create fundraising teams, campaigns or events by department, location, region, etc. Users are able to see, share, and interact with the fundraising activities of individuals and groups across the company.
Checks and EFT deposits	Checks and EFT deposits are generated by the system.
Direct payment	Users can opt to donate directly to a nonprofit instead of its parent organization.
Fees	Admins can configure giving transactions so that the company covers all donation fees to ensure the nonprofit receives the whole amount of an employee donation.
Payment options	Donors can use credit cards, PayPal, or other virtual payment types to make donations. All payment options are valid for single or recurring donations.

GIVING & MATCHING

Dashboards	Visually engaging presentation of relevant information to users and admins. This may include volunteer hours to date, upcoming events, competition progress or results, nonprofits helped, or balance of rewards bank.
Mapping to UN SDGs	Giving opportunities are linked to UN Sustainable Development Goals (SDGs). Users can specify SDG(s) of interest on their giving profile (if applicable). Admins can report on giving activity by SDG.

GRANTS MANAGEMENT

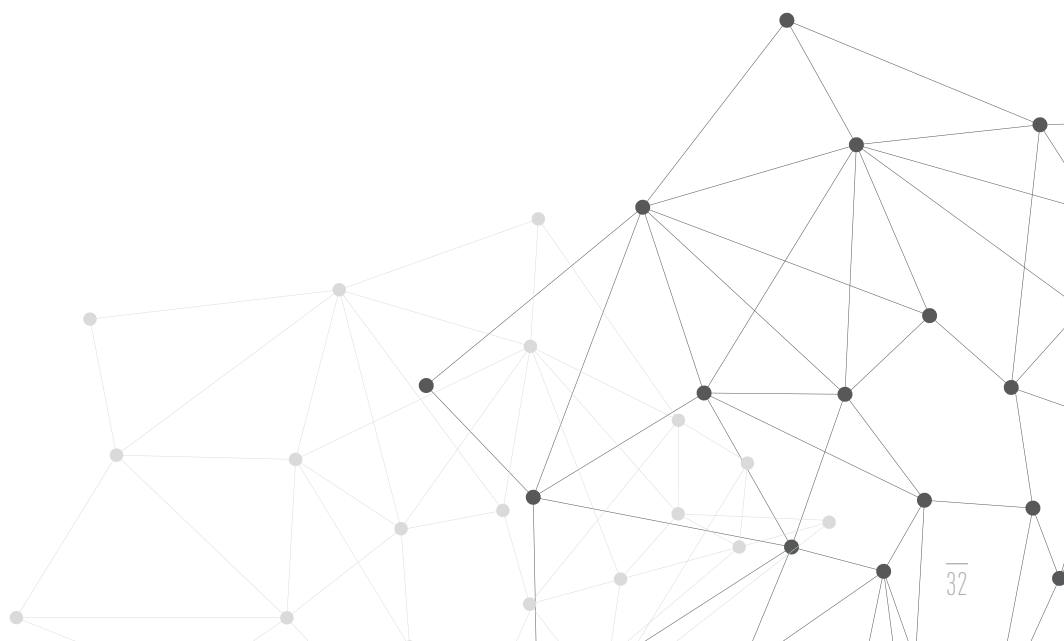
Applicant database	Grant applicants are stored in a database. Admins can view applicants by various criteria, such as basic info, applications received, grants awarded, communications exchanged, and grant type.
Grant eligibility	Grant eligibility is calculated based on preconfigured criteria, such as rolling 12-month eligibility.
Grant evaluation	Grant application evaluation according to various information and criteria is assisted through system tools. This may include but is not limited to benchmarking, application weighting, geographical region, and other customized criteria.
Applicant vetting	Nonprofits are vetted automatically. Only nonprofits that match corporate requirements show up when employees search for giving opportunities.
Review and approval workflow	Admins can configure review and approval workflows to accommodate individual or committee grant review processes. Workflows can be customized to each grant program.
Grants agreement templates	Grants agreement templates exist and/or can be created and/or edited by admins. Grant templates can be customized per grant program.
Volunteer grants	Individual and team volunteering grants can be facilitated.
Nonprofit access/functionality	Nonprofits have access to an external facing portal as a means to apply for and view the status of grants.
Status notifications	Notifications are sent to all agents (i.e. individual, company admin, nonprofit) at all relevant points of grant processing. This may include but is not limited to application submission and grant decision.
Checks & EFT deposits	Checks and EFT deposits are generated by the system.
Direct payment	Company can opt to disburse grants directly to nonprofit instead of via its parent organization.
Dashboards	Admins and select users can view and export raw data by various criteria in report format. Exports can be customized, aggregated, and/or segmented based on what the admin wants to see, which may include grant activity, company participation, and grants disbursed to date.

TECHNOLOGY SPECIFICATIONS

Internal communications	Ability to communicate with others within the client organization (users to users, admin to users, users to admin) via the platform.
External communications	Ability to communicate with others outside of client organization (e.g., with nonprofits) via the platform.
Internal sharing	The platform allows for social sharing within the site, including sharing images.
External sharing	The platform allows users to post directly to social media sites such as Facebook, Twitter, or LinkedIn.
Enterprise application integration	Ability to integrate with major enterprise applications (e.g., HRIS, CRM) via preconfigured APIs.
Global (configuration)	Ability to support global enterprises with a complex corporate structure (e.g., multi-company, multi-country, multi-site, etc.)
Global (localization)	The platform can be localized for different countries including language or location specific characters, text layout, capitalization, text sorting, punctuation, pluralization, and national conventions (e.g., units of measure, currency, standards, postal and phone number formats). If not all aforementioned localizations are available, please specify which.
Access & permissions	Allows administrators to configure access levels for different user roles.
Privacy - GDPR compliance	Platform is GDPR compliant.
Privacy - CCPA compliance	Platform is CCPA compliant.

VENDOR SUPPORT

Technical support (admin)	Provides technical support directly to administrators.
Technical support (users)	Provides technical support directly to users.
Training (admin)	Provides platform training for administrators.
Training (users)	Provides platform training for users.
Look and feel	Organizations have the ability to customize the platform to incorporate their own branding preferences.



FEATURED SOLUTIONS

VOLUNTEERING, GIVING & GRANTS

View this comparison if you are looking for a technology solution that supports any combination (one or more) of corporate **volunteering**, **giving** and **grants** programs. This section looks at **19 solutions**:

- + Alaya
- + America's Charities Engage Powered by SmartSimple Cloud
- + Benevity
- + Benojo
- + Bright Funds
- + Communiteer
- + CyberGrants
- + GivePulse
- + Givinga
- + GivingForce
- + GivingTrax
- + Good2Give
- + GozAround
- + HandsOn Connect
- + Optimy
- + SmartSimple
- + V2V
- + WeSpire
- + YourCause + Blackbaud



VOLUNTEERING, GIVING & GRANTS

	AUS		CAN			EUR			SA	USA								
	Benojo	Good2Give	Benevity	GozAround	Smartsimple	Alaya	GivingForce	Optimy	V2V	America's Charities	BrightFunds	Cybergrants	Givinga	GivingTrax	GivePulse	HandsOnConnect	WeSpire	YourCause + Blackbaud
VOLUNTEERING																		
PROPRIETARY DATABASE OF VOLUNTEER OPPORTUNITIES	●	●	●	●	●	●	◐	●	●	●	○	●	○	●	●	◐	◐	●
OPPORTUNITY DATABASE INTEGRATION	○	●	●	○	●	●	◐	◐	◐	●	●	◐	●	●	●	◐	◐	●
VOLUNTEER OPPORTUNITY & EVENT SEARCH	●	●	●	●	●	●	◐	●	●	◐	○	●	*	◐	●	◐	●	●
VOLUNTEER EVENT CREATION	●	◐	●	●	●	●	●	◐	●	●	●	○	●	●	●	●	●	●
VOLUNTEER EVENT SIGN UP	●	◐	●	●	●	●	●	●	●	●	●	○	●	●	●	◐	●	●
EVENT CREATION & MANAGEMENT	●	◐	●	●	●	●	●	◐	●	●	●	*	●	●	●	●	●	●
NATIVE VOLUNTEERING	●	●	●	○	●	●	○	●	●	●	●	○	●	●	●	◐	●	◐
NONPROFIT ACCESS	●	●	●	●	●	●	●	◐	●	●	○	●	○	●	●	◐	◐	●
SELF-REPORTING VOLUNTEER HOURS	●	●	●	●	●	●	●	●	◐	●	●	●	◐	●	●	◐	●	●
LOG HOURS BY PROXY	◐	○	●	●	●	●	●	○	●	●	●	●	◐	●	●	◐	●	●
PTO TRACKING (INDIVIDUAL)	○	○	●	●	●	●	●	◐	◐	●	◐	◐	◐	●	●	●	●	●
PTO TRACKING (TEAM)	◐	○	●	◐	●	●	●	○	◐	●	◐	●	◐	●	●	●	●	●
DOLLARS FOR DOERS BANK	○	◐	●	◐	●	◐	●	○	◐	●	●	●	●	●	●	●	●	●
SYSTEM RECOMMENDATIONS	◐	●	●	●	◐	●	●	◐	●	◐	●	◐	○	◐	●	◐	●	●
COMPETITIONS	◐	○	●	◐	●	●	○	○	◐	●	○	●	○	◐	●	◐	●	●
VOLUNTEER COMMUNITIES	◐	●	●	◐	●	●	●	○	●	●	○	●	○	●	●	◐	●	●
VOLUNTEER PROFILE	●	●	●	●	●	●	●	●	●	●	●	◐	◐	●	●	◐	●	●
RECOGNITION & REWARD	○	○	●	◐	●	●	●	◐	●	●	●	●	◐	●	●	●	●	●
DASHBOARDS	◐	●	●	◐	●	●	●	●	●	●	●	◐	◐	●	●	◐	●	●
MAPPING TO UN SDGS	●	●	●	◐	●	●	●	◐	●	●	◐	●	◐	◐	●	◐	◐	●

*Available through Golden

	AUS		CAN			EUR			SA	USA								
	Benojo	Good2Give	Benevity	GozAround	Smartsimple	Alaya	GivingForce	Optimy	V2V	America's Charities	BrightFunds	Cybergrants	Givinga	GivingTrax	GivePulse	HandsOnConnect	WeSpire	Your Cause + Blackbaud
GIVING & MATCHING																		
NONPROFIT DATABASE	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
NONPROFIT SEARCH	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
NONPROFIT ACCESS	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
COMPANY FOUNDATION	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
IN-KIND DONATIONS	●	●	●	●	●	●	●	○	●	●	○	●	●	●	●	●	●	●
GIFT CARDS	○	○	●	○	●	●	○	○	○	●	●	●	●	●	●	●	●	●
PAYROLL DEDUCTIONS	●	●	●	○	●	●	●	○	○	●	●	●	●	●	●	●	●	●
INTERNATIONAL GIVING & MATCHING	○	○	●	●	●	●	●	●	○	●	●	●	●	●	●	●	●	●
DISASTER RESPONSE - EXTERNAL	●	●	●	●	●	●	●	○	●	●	●	●	●	●	●	●	●	●
DISASTER RESPONSE - INTERNAL	○	●	●	○	●	●	●	○	●	●	●	●	●	●	●	●	●	●
PROCESSING & DISTRIBUTION	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	○	●	●
VETTING	○	●	●	●	●	●	●	○	○	●	●	●	●	●	●	●	●	●
FUNDRAISING PAGES	●	●	●	○	●	●	○	●	●	●	●	●	●	●	●	●	●	●
CHECKS AND EFT DEPOSITS	○	●	●	○	●	●	●	○	○	●	●	●	●	●	○	○	●	●
DIRECT PAYMENT	●	○	●	○	●	●	●	●	●	●	●	●	●	●	●	○	●	●
FEES	○	●	●	○	●	●	●	●	●	●	●	●	●	●	○	○	●	●
PAYMENT OPTIONS	●	●	●	●	●	●	○	○	●	●	●	●	●	●	●	●	●	●
DASHBOARDS	○	●	●	●	●	●	●	●	●	●	●	●	●	●	●	○	●	●
MAPPING TO UN SDGS	●	○	●	○	●	●	○	●	●	●	○	●	●	○	●	○	○	●

	AUS		CAN			EUR			SA	USA								
	Benojo	Good2Give	Benevity	GozAround	Smartsimple	Alaya	GivingForce	Optimy	V2V	America's Charities	BrightFunds	Cybergrants	Givinga	GivingTrax	GivePulse	HandsOnConnect	WeSpire	Your Cause + Blackbaud
GRANTS MANAGEMENT																		
APPLICANT DATABASE	🟡	🟢	🟢	🟡	🟢	🟡	🟢	🟢	🟡	🟢	🟢	🟢	🟢	🟢	🟢	🟡	🟢	🟢
GRANT ELIGIBILITY	🟠	🟡	🟢	🟠	🟢	🟡	🟢	🟢	🟠	🟢	🟡	🟢	🟢	🟢	🟢	🟡	🟢	🟢
GRANT EVALUATION	🟠	🟢	🟢	🟢	🟢	🟡	🟡	🟢	🟡	🟢	🟠	🟢	🟡	🟢	🟢	🟢	🟢	🟢
APPLICANT VETTING	🟠	🟡	🟢	🟡	🟢	🟡	🟢	🟡	🟡	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
REVIEW AND APPROVAL WORKFLOW	🟠	🟡	🟢	🟢	🟢	🟡	🟠	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟡	🟡	🟢
GRANTS AGREEMENT TEMPLATES	🟠	🟡	🟢	🟠	🟢	🟡	🟠	🟢	🟢	🟢	🟠	🟢	🟡	🟢	🟢	🟡	🟡	🟢
VOLUNTEER GRANTS	🟡	🟢	🟢	🟡	🟢	🟡	🟢	🟡	🟢	🟢	🟡	🟢	🟢	🟢	🟢	🟢	🟢	🟢
NONPROFIT ACCESS	🟠	🟢	🟢	🟡	🟢	🟡	🟡	🟢	🟡	🟢	🟢	🟡	🟢	🟢	🟢	🟡	🟢	🟢
STATUS NOTIFICATIONS	🟡	🟢	🟢	🟠	🟢	🟡	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟡	🟢	🟢
CHECKS AND EFT DEPOSITS	🟠	🟢	🟢	🟠	🟢	🟡	🟢	🟡	🟠	🟢	🟢	🟢	🟢	🟢	🟠	🟠	🟢	🟢
DIRECT PAYMENT	🟢	🟠	🟢	🟠	🟢	🟡	🟢	🟡	🟠	🟢	🟢	🟢	🟢	🟢	🟡	🟢	🟢	🟢
DASHBOARDS	🟡	🟡	🟢	🟡	🟢	🟡	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟡	🟢	🟢
TECHNOLOGY																		
INTERNAL COMMUNICATIONS	❌	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅
EXTERNAL COMMUNICATIONS	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅
INTERNAL SHARING	✅	✅	✅	✅	✅	✅	✅	❌	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅
EXTERNAL SHARING	✅	✅	✅	✅	✅	✅	✅	❌	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅
ENTERPRISE APPLICATION INTEGRATION	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅
GLOBAL (CONFIGURATION)	❌	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅
GLOBAL (LOCALIZATION)	❌	✅	✅	❌	✅	✅	✅	✅	✅	✅	❌	✅	❌	✅	✅	✅	✅	✅
ACCESS & PERMISSIONS	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅
PRIVACY - GDPR COMPLIANCE	❌	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	❌	✅	✅	✅	✅	✅	✅

	AUS		CAN			EUR			SA	USA								
	Benojo	Good2Give	Benevity	GozAround	Smartsimple	Alaya	GivingForce	Optimy	V2V	America's Charities	BrightFunds	Cybergrants	Givinga	GivingTrax	GivePulse	HandsOnConnect	WeSpire	YourCause + Blackbaud
VENDOR																		
TECHNICAL SUPPORT (ADMIN)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
TECHNICAL SUPPORT (USERS)	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
TRAINING (ADMIN)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
TRAINING (USERS)	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
LOOK AND FEEL	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

FEATURED SOLUTIONS

VOLUNTEERING & GIVING

View this comparison if you are looking for a technology solution that supports one or both of corporate **volunteering** and **giving** programs. This section looks at **11 vendors**:

- + Aplanet
- + BeCollective
- + Catalyser
- + Deed
- + eSolidar
- + GetConnected
- + Golden
- + GoodUp
- + Millie
- + StratusLIVE
- + Vendredi



	AUS			EUR				USA				
	BeCollective	Catalyser	Communteer	Aplanet	eSolidar	GoodUp	Vendredi	USA - Deed	GetConnected	Golden	Millie	StratusLive
VOLUNTEERING												
PROPRIETARY DATABASE OF VOLUNTEER OPPORTUNITIES	●	●	●	◐	◐	●	●	●	●	●	●	●
OPPORTUNITY DATABASE INTEGRATION	●	◐	◐	◐	◐	●	◐	●	○	●	○	●
VOLUNTEER OPPORTUNITY & EVENT SEARCH	●	●	◐	◐	◐	●	●	●	●	●	●	●
VOLUNTEER EVENT CREATION	●	●	◐	◐	●	●	◐	●	●	●	●	●
VOLUNTEER EVENT SIGN UP	●	●	○	◐	●	●	○	●	●	●	●	●
EVENT CREATION & MANAGEMENT	●	●	◐	◐	◐	●	◐	●	●	●	●	●
NATIVE VOLUNTEERING	●	●	●	●	○	●	●	●	●	●	●	●
NONPROFIT ACCESS	●	●	●	●	●	◐	●	●	●	●	●	●
SELF-REPORTING VOLUNTEER HOURS	●	●	◐	◐	●	◐	●	●	●	●	●	●
LOG HOURS BY PROXY	●	●	◐	●	●	●	●	●	●	●	◐	●
PTO TRACKING (INDIVIDUAL)	◐	◐	○	◐	○	●	●	●	○	●	○	●
PTO TRACKING (TEAM)	○	◐	○	◐	○	◐	●	●	○	●	○	●
DOLLARS FOR DOERS BANK	●	○	◐	○	○	○	◐	●	◐	◐	◐	◐
SYSTEM RECOMMENDATIONS	●	●	○	●	○	●	●	●	●	●	●	●
COMPETITIONS	◐	●	●	◐	○	◐	◐	●	●	●	●	●
VOLUNTEER COMMUNITIES	◐	●	●	◐	○	○	◐	●	●	●	●	●
VOLUNTEER PROFILE	●	●	◐	●	●	●	●	●	●	●	●	●
RECOGNITION & REWARD	●	●	◐	◐	●	◐	◐	●	●	●	●	◐
DASHBOARDS	●	●	◐	●	◐	●	●	●	●	●	●	●
MAPPING TO UN SDGS	●	●	●	●	●	◐	●	●	◐	●	◐	●

	AUS			EUR				USA				
	BeCollective	Catalyser	Communteer	Aplanet	eSolidar	GoodUp	Vendredi	USA - Deed	GetConnected	Golden	Millie	StratusLive
GIVING & MATCHING												
NONPROFIT DATABASE	●	●	◐	●	●	◐	●	●	◐	●	●	●
NONPROFIT SEARCH	◐	●	◐	○	●	◐	●	○	●	●	●	●
NONPROFIT ACCESS	●	●	◐	●	●	◐	●	●	○	◐	●	●
COMPANY FOUNDATION	●	●	○	◐	○	◐	◐	◐	○	●	●	●
IN-KIND DONATIONS	○	●	◐	◐	●	◐	◐	◐	○	●	○	○
GIFT CARDS	○	●	○	○	●	○	○	●	○	◐	●	○
PAYROLL DEDUCTIONS	●	●	◐	○	○*	○	○	●	○	◐	○	●
INTERNATIONAL GIVING & MATCHING	○	●	◐	◐	●	◐	◐	●	○	◐	●	○
DISASTER RESPONSE - EXTERNAL	◐	●	◐	◐	●	◐	◐	●	◐	●	●	●
DISASTER RESPONSE - INTERNAL	◐	●	○	◐	●	◐	◐	○	○	●	○	●
PROCESSING & DISTRIBUTION	◐	●	○	○	●	●	○	●	○	●	◐	●
VETTING	○	●	○	○	◐	○	○	●	○	●	●	●
FUNDRAISING PAGES	●	●	○	◐	●	◐	○	●	○	●	●	●
CHECKS AND EFT DEPOSITS	○	○	○	○	○	○	○	●	○	●	●	●
DIRECT PAYMENT	◐	●	○	○	●	◐	○	●	○	●	●	●
FEES	◐	●	○	○	○	●	○	●	◐	◐	◐	●
PAYMENT OPTIONS	◐	●	◐	◐	◐	◐	○	●	◐	◐	●	●
DASHBOARDS	◐	●	◐	◐	◐	●	○	●	●	◐	●	●
MAPPING TO UN SDGS	○	●	◐	◐	●	◐	○	●	○	●	○	●

*Under development

	AUS			EUR				USA				
	BeCollective	Catalyser	Communteer	Aplanet	eSolidar	GoodUp	Vendredi	USA - Deed	GetConnected	Golden	Millie	StratusLive
TECHNOLOGY												
INTERNAL COMMUNICATIONS	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
EXTERNAL COMMUNICATIONS	✓	✓	✓	✓	✓	✗	✓	✓	✓	✓	✓	✓
INTERNAL SHARING	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗
EXTERNAL SHARING	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗
ENTERPRISE APPLICATION INTEGRATION	✓	✓	✓	✓	✗	✗	✓	✓	✓	✓	✓	✗
GLOBAL (CONFIGURATION)	✓	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓
GLOBAL (LOCALIZATION)	✗	✓	✗	✓	✓	✓	✓	✓	✓	✓	✗	✓
ACCESS & PERMISSIONS	✓	✓	✓	✓	✗	✓	✓	✓	✓	✓	✓	✓
PRIVACY - GDPR COMPLIANCE	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓
VENDOR												
TECHNICAL SUPPORT (ADMIN)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
TECHNICAL SUPPORT (USERS)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
TRAINING (ADMIN)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
TRAINING (USERS)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
LOOK AND FEEL	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

FEATURED SOLUTIONS

VOLUNTEERING

View this comparison if you are looking for a technology solution that supports corporate **volunteering** programs. This section looks at **6 vendors**:

- + DeedMob
- + Do Some Good
- + Helper Helper
- + NLvoorelkaar powered by the Social Care Network
- + YouGiveGoods
- + Yumana



VOLUNTEERING

	CAN		EUR			USA	
	Do Some Good	DeedMob	NLvoorelkaar powered by the Social Care Network	Yumana	Helper Helper	YouGiveGoods	
VOLUNTEERING							
PROPRIETARY DATABASE OF VOLUNTEER OPPORTUNITIES	●	●	●	●	●	●	
OPPORTUNITY DATABASE INTEGRATION	○	●	●	●	◐	○	
VOLUNTEER OPPORTUNITY & EVENT SEARCH	●	●	●	●	●	◐	
VOLUNTEER EVENT CREATION	●	●	●	●	●	●	
VOLUNTEER EVENT SIGN UP	●	●	●	●	●	○	
EVENT CREATION & MANAGEMENT	●	●	◐	●	●	●	
NATIVE VOLUNTEERING	●	●	●	●	●	○	
NONPROFIT ACCESS	●	●	●	●	●	●	
SELF-REPORTING VOLUNTEER HOURS	●	●	◐	○	●	◐	
LOG HOURS BY PROXY	●	●	○	●	●	○	
PTO TRACKING (INDIVIDUAL)	●	◐	○	◐	●	○	
PTO TRACKING (TEAM)	◐	◐	○	◐	●	○	
DOLLARS FOR DOERS BANK	◐	○	○	○	○	◐	
SYSTEM RECOMMENDATIONS	●	●	●	◐	●	○	
COMPETITIONS	◐	●	◐	◐	●	●	
VOLUNTEER COMMUNITIES	◐	●	○*	●	●	●	
VOLUNTEER PROFILE	●	●	◐	◐	●	○	
RECOGNITION & REWARD	◐	●	○	◐	●	○	
DASHBOARDS	●	●	◐	●	●	○	
MAPPING TO UN SDGS	◐	●	○	●	◐	○	

*Under development

	CAN	EUR			USA	
	Do Some Good	DeedMob	NLvoorelkaar powered by the Social Care Network	Yumana	Helper Helper	YouGiveGoods
TECHNOLOGY						
INTERNAL COMMUNICATIONS	✓	✓	✓	✓	✓	✓
EXTERNAL COMMUNICATIONS	✓	✓	✓	✓	✗	✓
INTERNAL SHARING	✓	✓	✓	✓	✓	✓
EXTERNAL SHARING	✓	✓	✓	✓	✓	✓
ENTERPRISE APPLICATION INTEGRATION	✗	✓	✓	✓	✓	✓
GLOBAL (CONFIGURATION)	✓	✓	✓	✓	✓	✗
GLOBAL (LOCALIZATION)	✗	✓	✓	✓	✓	✗
ACCESS & PERMISSIONS	✓	✓	✓	✓	✓	✗
PRIVACY - GDPR COMPLIANCE	✗	✓	✓	✓	✓	✗
VENDOR						
TECHNICAL SUPPORT (ADMIN)	✓	✓	✓	✓	✓	✓
TECHNICAL SUPPORT (USERS)	✓	✓	✓	✓	✗	✓
TRAINING (ADMIN)	✓	✓	✓	✓	✓	✓
TRAINING (USERS)	✓	✓	✓	✗	✗	✓
LOOK AND FEEL	✓	✓	✓	✓	✓	✗

FEATURED SOLUTIONS

GIVING & GRANTS

View this comparison if you are looking for a technology solution that supports corporate **giving** or **grants** programs. This section looks at **7 solutions**:

- + Charity Vest
- + Do Some Good
- + GlobalGiving
- + Helper Helper
- + Innpactia
- + Pinkaloo
- + RaiseNow



	AUS	CAN	SA	USA			
	RaiseNow	Do Some Good	Innpactia	Charity Vest	Global Giving	Helper Helper	Pinkaloo
GIVING & MATCHING							
NONPROFIT DATABASE	●	○	○	●	●	○	●
NONPROFIT SEARCH	○	○	○	●	●	○	●
NONPROFIT ACCESS	●	○	○	○	●	○	○
COMPANY FOUNDATION	●	○	○	●	○	○	○
IN-KIND DONATIONS	○	○	○	○	○	○	○
GIFT CARDS	○	○	○	●	●	○	●
PAYROLL DEDUCTIONS	○	○	○	○	○	○	●
INTERNATIONAL GIVING & MATCHING	●	○	○	○	●	○	○
DISASTER RESPONSE - EXTERNAL	●	○	○	○	●	○	●
DISASTER RESPONSE - INTERNAL	○	○	○	○	●	○	○
PROCESSING & DISTRIBUTION	●	○	○	●	●	○	●
VETTING	●	○	○	○	●	○	●
FUNDRAISING PAGES	○	○	○	○	○	○	○
CHECKS AND EFT DEPOSITS	○	○	○	●	●	○	●
DIRECT PAYMENT	○	○	○	●	●	○	○
FEEES	●	○	○	●	●	○	●
PAYMENT OPTIONS	●	○	○	●	●	○	●
DASHBOARDS	●	○	○	○	○	○	○
MAPPING TO UN SDGS	○	○	○	○	○	○	○

	AUS	CAN	SA	USA			
	RaiseNow	Do Some Good	Impactia	Charity Vest	Global Giving	Helper Helper	Pinkaloo
GRANTS MANAGEMENT							
APPLICANT DATABASE	○	●	◐	○	●	◐	○
GRANT ELIGIBILITY	○	○	◐	○	◐	◐	○
GRANT EVALUATION	○	◐	●	○	○	○	○
APPLICANT VETTING	○	○	◐	○	●	◐	○
REVIEW AND APPROVAL WORKFLOW	○	●	◐	○	●	◐	○
GRANTS AGREEMENT TEMPLATES	○	●	◐	○	●	○	○
VOLUNTEER GRANTS	○	●	◐	○	◐	○	○
NONPROFIT ACCESS	○	●	○	○	●	○	○
STATUS NOTIFICATIONS	○	●	●	○	●	◐	○
CHECKS AND EFT DEPOSITS	○	○	◐	○	●	○	○
DIRECT PAYMENT	○	○	◐	○	●	◐	○
DASHBOARDS	○	●	◐	○	●	◐	○
TECHNOLOGY							
INTERNAL COMMUNICATIONS	✗	✓	✓	✗	✗	✓	✗
EXTERNAL COMMUNICATIONS	✗	✓	✗	✗	✗	✗	✓
INTERNAL SHARING	✓	✓	✗	✗	✗	✓	✓
EXTERNAL SHARING	✓	✓	✗	✗	✓	✓	✓
ENTERPRISE APPLICATION INTEGRATION	✓	✗	✗	✗	✗	✓	✓
GLOBAL (CONFIGURATION)	✗	✓	✓	✓	✓	✓	✓
GLOBAL (LOCALIZATION)	✓	✗	✓	✗	✗	✓	✗
ACCESS & PERMISSIONS	✓	✓	✓	✗	✗	✓	✓
PRIVACY - GDPR COMPLIANCE	✓	✗	✓	✓	✓	✓	✓
VENDOR							
TECHNICAL SUPPORT (ADMIN)	✓	✓	✓	✓	✓	✓	✓
TECHNICAL SUPPORT (USERS)	✗	✓	✓	✓	✓	✗	✓
TRAINING (ADMIN)	✓	✓	✓	✓	✓	✓	✓
TRAINING (USERS)	✓	✓	✓	✓	✗	✗	✓
LOOK AND FEEL	✓	✓	✓	✗	✓	✓	✓

SOLUTIONS NOT FEATURED

RWI invited the following solution providers to participate in this research with the intent of compiling a comparison and analysis of all known volunteering, giving and grants technologies on the market.

Of 64 solution providers, 23 declined to participate or were unresponsive.

VOLUNTEERING, GIVING & GRANTS

AIMS

Location: Dublin, Ireland

DONATIONXCHANGE

Location: Chicago, IL, USA

FLUXX

Location: San Francisco, CA, USA

VOLUNTEERING & GIVING

DOTOPIA

Location: Minneapolis, MN, USA

FRONSTREAM

Location: Cambridge, MA, USA

PURPOSED

Location: Sydney, NSW, AUS

GOODCOMPANY

Location: Brighton East, VIC, AUS

MAXIMUSLIFE

Location: Dallas, TX, USA

PORPOISE

Location: Moncton, New Brunswick, CAN

SALESFORCE PHILANTHROPY CLOUD

Location: San Francisco, CA, USA

SELFLESSLY

Location: Indianapolis, IN, USA

VOLUNTEERING

VOLLIE

Location: Melbourne, Victoria, AUS

VSYS ONE

Location: Albany, NY, USA

SOCIAL GOOD CONNECT

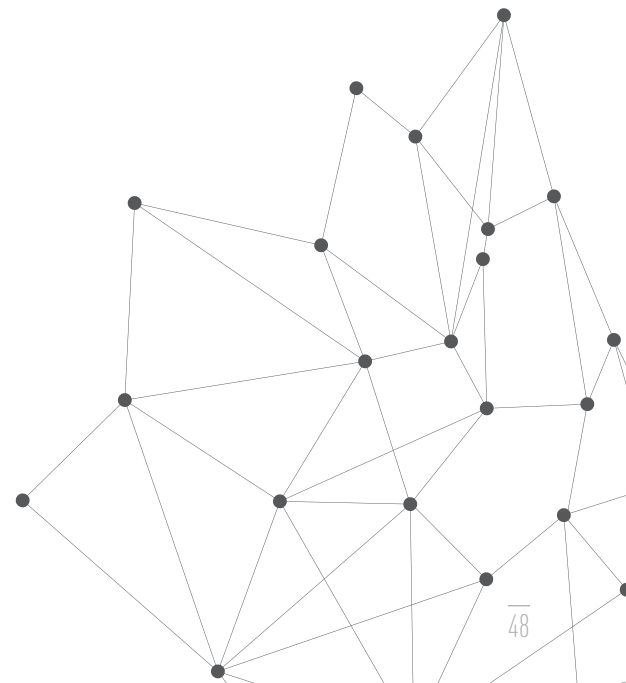
Location: Dundee, Tayside, EUR

YOURMATCH (VOLUNTEERMATCH)

Location: Oakland, CA, USA

VOLO (VOLO GROUP)

Location: London, UK, EUR



GIVING & GRANTS

SUBMITTABLE

Location: Missoula, MT, USA

GIVING

GRAPEVINE

Location: New York, NY, USA

SIMPLY GIVING

Location: Singapore, SEA

ISOLVED

Location: Charlotte, NC, USA

GRANTS

EVALATO

Location: Barcelona, Spain

SURVEY MONKEY (formerly FLUIDREVIEW)

Location: San Mateo, CA, USA

SPONSORIUM

Location: Montreal, QC



MARKET PLAYERS OF INTEREST

While this report is focused on corporate solutions for volunteering, giving and grants, there are several organizations actively working to move the CSR industry forward in other ways. Below is an overview of notable market players.

DOUBLE THE DONATION



PRODUCT NAME:

360MatchPro by
Double the Donation

LOCATION: Atlanta, GA, USA

UNIQUE MARKET OFFERING: Double the Donation builds and maintains the most robust database of companies, with employee matching gift and volunteer grant programs. Partnered with all the leading nonprofit and educational software providers to help organizations maximize their matching gift revenue, Double the Donation's suite of matching gift automation tools propel the matching gift fundraising at thousands of nonprofits and higher educational institutions.

NOTABLE PARTNERSHIPS AND/OR INTEGRATIONS:

- ▶ CRMs: Salesforce, Blackbaud, NeonCRM, Kindful, DonorPerfect, Virtuous, and many others
- ▶ Donation Tools: Luminare, Soapbox Engage, Fundraise Up, Salsa Engage, DonorBox, iDonate, Funraise, GiveButter, and many others
- ▶ Peer-to-Peer Fundraising Platforms: Classy, Rallybound, Teamraiser, Funraise, Fundraise Up, Qgiv, and many others
- ▶ Educational Institution Fundraising: Ellucian, GiveCampus, AlumniIQ, Wilson-Bennett, UCInnovation, iModules, Custom Donations, and many others

E4E RELIEF



PRODUCT NAME:

Employee Relief Fund

LOCATION: Charlotte, North Carolina, USA

UNIQUE MARKET OFFERING: For 20 years, E4E Relief has been the leading provider of charitable employee relief programs, rapidly responding to employee disaster and hardships on behalf of corporations. This charitable financial assistance comes in the form of direct cash grants that employees can use to cover unexpected expenses resulting from a disaster or hardship. Employee relief funds are an equitable, efficient way to ensure financial grants are getting directly in the hands of the people who need it by providing an objective determination of need.

Over the past five years, E4E Relief has awarded nearly \$200 million in charitable grants, supporting relief efforts for over 5M people worldwide. Learn more about establishing an employee relief fund program for your corporation at www.E4ERelief.org.

NOTABLE PARTNERSHIPS AND/OR INTEGRATIONS: Many of E4E Relief's corporate clients feature their employee relief fund on their giving platform. Employees can make a charitable donation to the fund which supports fellow colleagues in times of crisis. Select clients include: LendingTree, Salesforce, Petco, HP, Five Guys, Siemens, Inspire Brands, Cintas, Kaiser Permanente, Cargill, Duke Energy and Conagra.

ETHICAL ANGEL



PRODUCT NAME:

Ethical Angel

LOCATION: United Kingdom (used in 52 countries)

UNIQUE MARKET OFFERING: Packaging the needs of global causes as experiential learning opportunities for employees. By commoditizing societal needs, Ethical Angel provides a free and sustainable resource for charities, social enterprises, and NGOs to save time, energy, and money, which they are then reallocating to their beneficiaries.

NOTABLE PARTNERSHIPS AND/OR INTEGRATIONS: PepsiCo, BP, Barclays, Refinitiv and SONY – average user NPS +63

PRODUCT NAMES:

Enterprise Impact Module;
Enterprise Grants Module;
Enterprise ESG Reporting Suite;
Goodera Advisory

LOCATION: Delivered globally, with a particular focus on North America and South Asia, with a presence in India and the US.

UNIQUE MARKET OFFERING: Goodera Enterprise product boasts a full range of platform offerings to manage, streamline, and visualise your impact, philanthropic and sustainability goals. Goodera's ESG Reporting Suite caters to data collection, management, visualisation and reporting needs of organisations of all sizes. Its value is most aptly applied to companies that manage substantial data point numbers – operating across many brands or entities, facilities, and geographies, etc. Goodera's Impact module offers high level customization in data collection for all your social impact initiatives across geographies to provide aggregate views for decision making on project performance, financial outlay, regulatory compliance to applicable CSR laws, and SDG mapping for insights based on the dashboards of various stakeholder groups.

The Grants module streamlines the entire philanthropic selection process from individual grants to institutional grants, due diligence, project selection, evaluation, auto-generating contracts, right till managing budget and payments management. Goodera's Advisory delivers materiality assessments, guidance through reporting standard and KPI selection, competitive benchmarking for target development and program design, 3rd party data verification, program implementation, management of environmental and social aspects of supply chains, and more. Goodera offers specialised advisory services to cater to regulatory and compliance requirements from Annual reporting, and financial governance of CSR projects along with strategic services to outline CSR vision and goals.

NOTABLE PARTNERSHIPS AND/OR INTEGRATIONS: Goodera Enterprise systems offer powerful insights-based dashboards which can be integrated on public sites. In line with specific needs, Goodera offers data connector APIs, DocuSign, Aadhar and mobile based NSDL signature among others. Some of the notable organisations that have benefited from Goodera's Enterprise solutions are: Gap Inc., PVH Corp, Dell, Capgemini, Target, Viatris (formerly Mylan), Novartis, Genpact, Tata Communication, Hexaware, Bajaj, Nilekani Philanthropies, Tata Trusts, etc.

PRODUCT NAME:

Karma Hub

LOCATION: Delivered globally, with a primary focus on North America

UNIQUE MARKET OFFERING: Platform provides curated virtual and hybrid volunteering opportunities across 100+ countries with 50K+ nonprofits. In the last year they have worked with 50+ Fortune 500 companies and have an industry leading Net Promoter Score ("NPS") of 86 across virtual volunteering activities delivered over the last 12 months.

NOTABLE PARTNERSHIPS AND/OR INTEGRATIONS:

YourCause + Blackbaud, Zoom, Microsoft Teams

**PRODUCT NAME:**

Humanitas

LOCATION: Palo Alto, CA

UNIQUE MARKET OFFERING: Humanitas is a startup building the public interest technology infrastructure backed by investors and philanthropists from the Stanford community. One of Humanitas' offerings is a unique product to seamlessly embed personalized cause marketing into the rewards, checkout, and/or new user offers of any consumer facing businesses such as retailers, fast food vendors, grocers, banks, and marketplaces. Humanitas can be easily integrated into businesses of all sizes and volumes with our industry leading machine learning technologies. For example, at checkout, end-users can round up their purchase of pet supplies to donate to a recommended local animal shelter. The Humanitas experience is especially helpful in dense, urban environments. Comparable integrations with grocers have led to a 15% increase in average order value (AOV) and a 2% increase in gross revenue.

PURPOSITY



PRODUCT NAME:

Purposity

LOCATION: United States

UNIQUE MARKET OFFERING: Purposity comes from the core belief that humanity finds purpose through generosity. The nonprofit's technology is designed to inspire individuals to take their next selfless act. Purposity equips people who want to help with a fun and easy way to do so from their phones (e.g., buy formula for a single mother's newborn baby or shoes for an unhoused student). Users have a profile that tracks their generosity over time.

Giving on Purposity is:

- ▶ One-to-one – direct to individuals in need who have been vetted by local schools and nonprofits
- ▶ Transparent – notifications are sent upon purchase and delivery of items
- ▶ Real time – users see nearby needs posted daily
- ▶ Scalable – currently used by more than 1,200 schools and nonprofits across the US
- ▶ Tax deductible – with 100% of funds going to meet the cost of needs

Purposity allows companies to set up employee teams to track participation and giving, manage campaigns, support targeted partners and impact areas, and aggregate results for ESG reporting. Purposity also offers an easy way to mobilize and report on consumer engagement as part of social impact and brand building strategies.

NOTABLE PARTNERSHIPS AND/OR INTEGRATIONS:

- ▶ Companies: Equitable, Georgia Power, IDEO/Gates Foundation Better Giving Studio
- ▶ Government: Hawaii Department of Education, Tennessee Governor's Office and Department of Education, Idaho Department of Education, Mayor of Denver, CO
- ▶ School Districts: Atlanta Public Schools, Charlotte-Mecklenburg Schools, Clark County Public Schools (NV), Denver Public Schools, Fulton County Schools (GA), Nashville Public Schools, Prince George's County Public Schools (MD)
- ▶ Nonprofits: Make-A-Wish, Boys & Girls Clubs

REVERE



PRODUCT NAMES:

Revere Skills-Based Volunteering Software

LOCATION: Denver, CO, USA – Revere's corporate and foundation clients are national and international in scope.

UNIQUE MARKET OFFERING: Revere Software provides a personalized and private labeled platform for corporations and philanthropies to host their virtual and in-person skills-based volunteering programs. Clients include Salesforce, DocuSign, Autodesk and other socially conscious organizations. Revere enables 1.) virtual and in-person team projects and 2.) virtual and in-person one-to-one meetings. More information can be found at www.getrevere.com.

NOTABLE PARTNERSHIPS AND/OR INTEGRATIONS:

Employee-nonprofit engagement data can be pulled into Benevity, Salesforce, YourCause + Blackbaud, Deed, Asana, Atlassian, etc.

SUMMERY



PRODUCT NAMES:

The Kind Quiz® and Net Culture Score®

LOCATION: Global

UNIQUE MARKET OFFERING: Summery delivers proprietary AI-driven applications that measure and assess individual values and organizational culture. By combining behavioral science with Machine Learning (ML) and Natural Language Processing (NLP), they activate and analyze stakeholder—employee, donor, student—engagement and organizational cultural alignment.

Summery technologies are in use in 146 countries with multilingual capabilities. Their end-to-end solution enables organizations to personalize stakeholder engagement, matching giving, volunteering, learning, and community activities based on individual social impact value profiles. More information can be found at www.summery.ai.

NOTABLE PARTNERSHIPS AND/OR INTEGRATIONS: Bill & Melinda Gates Foundation, NASDAQ, Salesforce, Facebook, Global Giving, Duke University, Stanford University, California Community College system



SECTION 03
SOLUTION SPOTLIGHTS

AN IN-DEPTH REVIEW OF
20 TECHNOLOGY SOLUTIONS

●

SOLUTION SPOTLIGHTS OVERVIEW

20 OF 41 SOLUTION PROVIDERS AGREED TO LET US TAKE A CLOSER LOOK

Of the 41 reviewed in this report, **20 solution providers agreed to let us take a closer look** at additional features and functionality, technology specifications and vendor support options.

Read this section if you are looking for more detail on one or more of the following solutions:

VOLUNTEERING, GIVING & GRANTS – 63

- + Alaya
- + America's Charities Engage
Powered by SmartSimple Cloud
- + Benevity
- + Bright Funds
- + CyberGrants
- + GivePulse
- + GivingForce
- + GivingTrax
- + GozAround
- + Givinga
- + SmartSimple
- + WeSpire
- + YourCause + Blackbaud

VOLUNTEERING & GIVING – 90

- + Communit eer
- + ESolidar
- + Golden
- + Vendredi

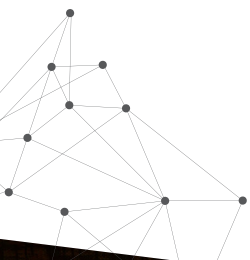
VOLUNTEERING – 99

- + Deedmob

GIVING & GRANTS – 102

- + Pinkaloo
- + Raise Now

RWI DOES NOT ADVISE THE SELECTION OF A PLATFORM BASED SOLELY ON WHAT THIS REPORT CONTAINS. THE INFORMATION HEREIN IS INTENDED ONLY TO PROVIDE A BASE OF KNOWLEDGE AND AWARENESS OF THE TECHNOLOGY MARKET AND KEY CONSIDERATIONS IN SUCCESSFULLY PROCURING AND IMPLEMENTING A PLATFORM. [READ MORE HERE.](#)



EVALUATION KEY

Solution providers are evaluated on the basis of **features and functionality**, **technology specifications** and **vendor support**. Note the following evaluation keys before reviewing solution spotlights.

FEATURES & FUNCTIONALITY

- Not available**
The solution provider does not offer this feature or functionality within the featured platform.
- Partially available**
The feature or functionality is not available in the platform but can be made partially or wholly available through customization.
- Basic functionality available**
The feature or functionality is available at a basic level relative to what is available in the market.* The capability is available out-of-the-box and/or with configuration only (i.e., no customization required).
- Advanced functionality available (customization)**
The feature or functionality is available at an advanced level relative to what is available in the market.* The capability is available at a basic level out-of-the-box and/or with configuration only and requires some customization to enhance.
- Advanced functionality available (configuration)**
The feature or functionality is available at an advanced level relative to what is available in the market.* The capability is available out-of-the-box and/or with configuration only (i.e. no customization required).

TECHNOLOGY SPECIFICATIONS & VENDOR SUPPORT

- Yes Available**
Technology capability/vendor support option is available.
 - No Not available**
Technology capability/vendor support option is not available.
- Notes** Additional or qualifying notes on technology capability/vendor support option.

*RWI analyst discretion.



VOLUNTEERING: ACTIVE OPPORTUNITIES (PROPRIETARY)

is the one exception to the evaluation key on the left. This feature is evaluated on the following scale:

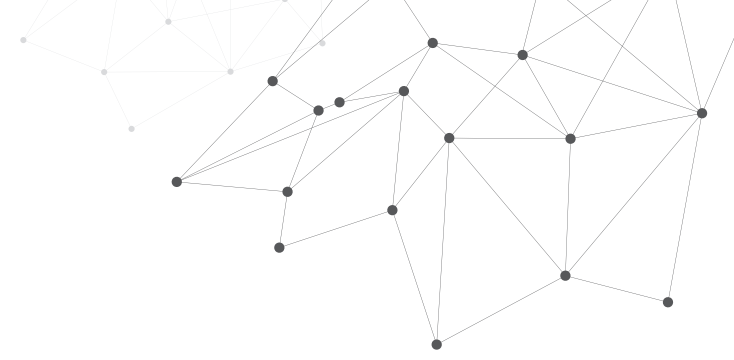
- 0 volunteering opportunities** are available in the solution provider's proprietary database.
- 1-1,000 volunteering opportunities** are available in the solution provider's proprietary database.
- 1,001-10,000 volunteering opportunities** are available in the solution provider's proprietary database.
- 10,001-100,000 volunteering opportunities** are available in the solution provider's proprietary database.
- 100,001+ volunteering opportunities** are available in the solution provider's proprietary database.

LOOK OUT FOR the following indicating exceptions to these evaluation keys on the left:

- Coming soon** **On the roadmap** | Feature or functionality is not currently available for purchase or implementation but is on the roadmap for development in the next 1-12 months.
- Third-party integration** | Feature or functionality is provided by the vendor through integration with a third-party provider. Speak to the solution provider for more information.

DEFINITIONS

Spotlight solutions are evaluated on the following criteria related to volunteering, giving, grants, technology specifications and vendor support.



- Sample** | Represent criteria also reviewed in the **Featured Solutions** comparison.
- Sample** | Are unique to the **Solution Spotlight** evaluations.

REVIEW AND REFER BACK TO THE DEFINITIONS BELOW TO CLARIFY THE EXACT MEANING OF COMPARISON CRITERIA.

VOLUNTEERING

Feature	Description
Proprietary database of volunteer opportunities	Database of opportunities is owned, populated or curated, and managed by the solution provider (i.e., native to platform/not an integration). Database is accessible to employees upon platform implementation.
Active opportunities (all proprietary)	Number of open and active volunteering opportunities within a solution provider’s proprietary database. Not applicable for solutions without a proprietary volunteer opportunity database.
Active opportunities (virtual proprietary)	Number of open and active virtual volunteering opportunities within a solution provider’s proprietary database. Not applicable for solutions without a proprietary volunteer opportunity database.
Real time database	Database is updated and available to employees in real time (i.e., there is no downtime between when updates are made to opportunities and when employees have access to them).
NPO access	Database of opportunities can be updated by social enterprises, nonprofits, and other partner organizations (i.e., those providing volunteering opportunities). Nonprofits have access to an external facing portal as a means of posting and managing volunteering events.
Opportunity database integration	Platform is integrated with a third-party source of volunteering opportunities, or clients are able to subscribe to third-party sources via the platform.
Opportunity and event search	Users can search for and view a calendar of volunteering opportunities and/or events within and outside of the company by various criteria (location, cause area, skills-based, etc.).
NPO partner request	Submit a request to validate nonprofit for company sanctioned volunteer opportunities, and enable workflow to approve and input the nonprofit as a volunteer opportunity searchable within the system.
Volunteer event creation	Users can create volunteer opportunities for nonprofits recognized by the system. The creator becomes the opportunity owner/host or can assign an owner/host.
Volunteer event types	Event creators can specify and configure events based on event types, which may include but is not limited to nonprofit, community based, skills-based, virtual, and fundraising opportunities.
Volunteer event signup	Users can sign up for events in the system. Sign-ups can be managed by a predetermined set of criteria (e.g., participant limits) and are provided with necessary event information (e.g., signup confirmation, event details).
Native volunteering	Users are able to sign up for and participate in volunteer activities directly within the platform.
Work products	Users are able to save work products from virtual volunteering activities directly within the platform.
Automatic time tracking	The system automatically tracks times spent on virtual volunteering activities conducted within the platform.
Log hours (self-report)	Volunteers are able to self-report hours for events initiated within and without the system (i.e., volunteer hours performed apart from their company).

VOLUNTEERING (CONTINUED)

Feature	Description
Log hours (proxy)	Admins can enter and/or validate volunteer hours on behalf of employees.
NPO validation	Nonprofits can validate employee volunteer hours through an external facing interface.
PTO tracking (individual)	Users can enact and track volunteering paid-time-off (PTO). Manager approvals of PTO can be facilitated via the system.
PTO tracking (team)	Users, admins, and/or managers can enact and track volunteering paid-time-off (PTO) on an individual and/or team basis.
Dollars for Doers	Employee rewards bank accumulates automatically based on predefined dollar value per volunteer hour and reward thresholds. Functionality is integrated with the solution's giving module to allow employees to make donations from their rewards account to a nonprofit of choice.
System recommendations	Users are provided with volunteering opportunity recommendations based on information stored in the platform, which can include, but is not limited to interests, location, or skills. Recommendations are delivered to users in a variety of ways, including notifications, emails, and dashboard suggestions.
Competitions	Competitions can be hosted between individuals or groups by department, site, or another employee attribute. Competitions are configured to have a time bound goal and tracks against that goal.
Volunteer communities	Admins can create volunteer teams manually or by department, location, region, etc. Users are able to see, share and interact with volunteering activities of individuals and groups across the company.
Volunteer profile	Users have a personal profile which may include employee information, volunteering history, event schedule, cause interests, and skills.
Recognition and reward	Users and admins can recognize individuals or groups for their volunteering activity. Admins can facilitate (manually or automatically) the distribution of rewards to employees for volunteering activity.
Hours logged	Admins can report on volunteer hours by various criteria which may include individual totals, team totals, dollar value of time, nonprofit partner, or cause area.
Post-event surveys	Admins or event owners can configure and distribute post-event surveys to collect employee sentiment on past volunteering events.
Dashboards	Visually engaging presentation of relevant information to users and admins. This may include volunteer hours to date, upcoming events, competition progress or results, nonprofits helped, or balance of rewards bank.
Data and exports	Admins and select users can view and export raw data by various criteria in report format. Exports can be customized, aggregated and/or segmented based on what the admin wants to see, which may include the number of events to date, list of participants, volunteer hours within time period, or hours volunteered by department.
Real time reporting	Data is available in real time.
Mapping to UN SDGs	Volunteering opportunities are linked to UN Sustainable Development Goals (SDGs). Users can specify SDG(s) of interest on their volunteer profile (if applicable). Admins can report on volunteering activity by SDG.
Workflows	Admins can configure and/or customize workflows to support volunteering processes which may include nonprofit requests, event creation, hours administration approvals, or distribution of rewards.

Feature	Description
Nonprofit database	Database of giving opportunities is available to users. The database is owned, populated or curated, and managed by the solution provider, client, or both.
Nonprofit profile overview	Information about the nonprofit is accessible to users for the sake of donor transparency. Profiles contain a summary of the company's activity related to that nonprofit.
Nonprofit partner request	Users can submit a request to validate a nonprofit for company sanctioned volunteering opportunities. A workflow enables the submission, review, approval, and notification of results for nonprofit partner requests.
Nonprofit search	Users can search for giving opportunities within and outside of the company by various criteria, such as location, cause area, etc.
Nonprofit access/ functionality	Nonprofits have access to an external facing portal as a means to post and manage giving opportunities and view relevant donor data.
Company foundation	A company foundation is a charitable entity within the system. Employees can interact with the foundation as specified by admins.
In-kind donations	Giving opportunities can be configured for in-kind donations and are logged.
Gift cards	Admins can distribute virtual or physical gift cards to employees as a reward for giving activity and/or to donate to a nonprofit on the individual or company's behalf.
Payroll deductions	Integration with HR systems to facilitate payroll giving via automatic interface or deduction file.
International giving/ matching	Users can donate to international nonprofits, and international employees can donate to local organizations. Donations can be made in any currency and the system is able to match those donations.
Disaster response (external)	Users and administrators can create giving opportunities related to disaster relief efforts within a community.
Disaster response (internal)	Users and administrators can create giving opportunities related to disaster relief efforts within the company (employee-to-employee, company-to-employee).
Automatic matches	Matches are triggered automatically and in real time when donations qualify.
Match optimization	Donors are assisted with the planning of donations in order to maximize giving benefits provided by their company. Donors can schedule giving activities, such as recurring gifts.
Thresholds	Giving parameters (i.e., minimums, caps) are configured in the system. Thresholds can be customized by employee attributes. When applicable, users are prompted based on those parameters.
Processing and distribution	The solution provider processes and distributes donation funds. Funds are held for distribution in a legally protected, externally audited account separate from the provider's operations.
Vetting	Nonprofits are vetted automatically. Only nonprofits that match corporate requirements show up when employees search for giving opportunities.
Fundraising pages	Users or admins can create fundraising teams, campaigns or events manually or by department, location, region, etc. Users are able to see, share, and interact with fundraising activities of individuals and groups across the company.
Funding status notifications	Notifications are sent to all agents (i.e., individual, company admin, nonprofit) at all relevant points of a donation transaction. This may include but is not limited to the point of donation, processing updates, or fund distribution.
Giving profile	Users have a personal profile which may include employee information, giving history, favorite nonprofits, and cause interests.
Recognition and reward	Users and admins can recognize individuals or groups for their giving activity. Admins can facilitate (manually or automatically) the distribution of rewards to employees for volunteering activity.
Checks and EFT deposits	Checks and EFT deposits are generated by the system.
Direct payment	Users can opt to donate directly to a nonprofit instead of its parent organization.

GIVING & MATCHING (CONTINUED)

Feature	Description
Fees	Admins can configure giving transactions so that the company covers all donation fees to ensure the nonprofit receives the whole amount of an employee donation.
Disbursement cadence	Admins can configure disbursement cadences (i.e., monthly, quarterly, annually) without amount limitations.
Payment options	Donors can use credit cards, PayPal, or other virtual payment types to make donations. All payment options are valid for single or recurring donations.
Admin self-service	Admins can see all giving transactions, including donations, matches, disbursements, etc. Transactions can be viewed by individual, company group, or other criteria.
Dashboards	Visually engaging presentation of relevant information to users and admins. This may include but is not limited to volunteer hours to date, upcoming events, competition progress or results, nonprofits helped, or balance of rewards bank.
Data and exports	Admins and select users can view and export raw data by various criteria in report format. Exports can be customized, aggregated and/or segmented based on what the admin wants to see, which may include but is not limited to the number of donations to date, list of donors, donation amount within time period, or donations by department.
Future forecasting	Admins can forecast giving projections based on data across all employee giving profiles (e.g., based on recurring gift settings).
Real-time reporting	Data is available in real time.
Tax information	Year end tax information is supplied for donors and the company.
Mapping to UN SDGs	Giving opportunities are linked to UN Sustainable Development Goals (SDGs). Users can specify SDG(s) of interest on their giving profile (if applicable). Admins can report on giving activity by SDG.
Workflows	Admins can configure and/or customize workflows to support volunteering processes which may include nonprofit requests, event creation, opportunity creation approvals, or distribution of rewards.

GRANTS MANAGEMENT

Feature	Description
Applicant database	Grant applicants are stored in a database. Admins can view applicants by various criteria, such as basic info, applications received, grants awarded, communications exchanged, grant type, etc.
Grant eligibility	Grant eligibility is calculated based on preconfigured criteria (e.g., rolling 12-month eligibility).
Forms	Forms makes applying for grants easy with the ability to upload attachments, provide an e-signature, and other standard form functionality.
Metadata	Grant data is geo-coded (e.g., city, state, zip code, congressional district, etc.) for both the nonprofit location and use of grant funds.
Grant application Templates	Grant application templates are available and contain customizable question logic. Users can create applications from scratch with an intuitive form designer.
Collaboration	Users can collaborate on the evaluation of grant applications by tracking and circulating edits or comments to other users. Tools, such as workflows, enable collaboration between users from the point of application submission through to award.
Grant evaluation	Grant application evaluation according to various information and criteria is assisted through system tools. This may include but is not limited to benchmarking, application weighting, geographical region, and other customized criteria.
Applicant vetting	Nonprofits are vetted automatically. Only nonprofits that match corporate requirements show up when employees search for giving opportunities.

GRANTS MANAGEMENT (CONTINUED)

Feature	Description
Applicant deduplication	Duplicate applicants are automatically identified (e.g., by tax ID, basic info, question responses, etc.) and flagged to users or removed.
Review and approval workflow	Admins can configure review and approval workflows to accommodate individual or committee grant review processes. Workflows can be customized to each grant program.
Approval thresholds	Approval thresholds are automatically determined based on program parameters (e.g., dollar amount) and executed accordingly.
Grants agreement templates	Grants agreement templates exist and/or can be created and/or edited by admins. Grant templates can be customized per grant program.
Grant disbursement	Grant funds are automatically dispersed at a predetermined point in a grant approval workflow. Grants can also be disbursed manually.
Volunteer grants	Individual and team volunteering grants can be facilitated.
Status notifications	Notifications are sent to all agents (i.e., individual, company admin, nonprofit) at all relevant points of a grant processing. This may include but is not limited to application submission and grant decision.
Email records	All correspondence exchanged between grant application and company agents are centrally tracked and available for reference to those with access to grant applications.
Nonprofit access/ functionality	Nonprofits have access to an external facing portal as a means to apply for and view the status of grants.
Recognition and reward	Users and admins can recognize individuals or groups for grant activity. Admins can facilitate (manually or automatically) the distribution of rewards to employees.
Direct payment	The company can opt to disburse grants directly to nonprofit instead of via its parent organization.
Checks and EFT deposits	Checks and EFT deposits are generated by the system.
Dashboards	Admins and select users can view and export raw data by various criteria in report format. Exports can be customized, aggregated and/or segmented based on what the admin wants to see, which may include grant activity, company participation, grants disbursed to date, etc.
Data & exports	Data is available in real time.
Real time reporting	Grants and grant applications are linked to UN Sustainable Development Goals (SDGs). Applicants can specify SDG(s) of interest on their volunteer profile (if applicable). Admins can report on grant activity by SDG.
Workflows	Admins can configure and/or customize workflows to support volunteering processes which may include application evaluation and application approvals.

COMMUNICATIONS

Internal communications	Admins and users can communicate with others internal to the client organization (user-user, admin-user). Communication can be one-way or two-way (enables back-and-forth between agents).
External communications	Admins and users can communicate with others external to the client organization (user-nonprofit, admin-nonprofit). Communication can be one-way or two-way (enables back-and-forth between agents).
Internal sharing	Content within the system can be shared by users to other users.
External sharing	Content within the system can be shared by users to external sites.

USABILITY

Access	The degree to which your platform enables universal access, such as via URL (not intranet exclusive); company email address not required (only EE ID, SSO, etc.)
Automation	The platform's ability to automate: workflows, auto-populate form fields, trigger notifications, etc.
Error identification	The ways in which your platform enables error identification, including entry duplicates, invalid input, etc.
Look and feel customization	The ways in which organizations can customize the platform to incorporate their own branding preferences.
Search capabilities	The search capabilities available to users and administrators (e.g., searching opportunities, events, and contacts by various criteria such as location or cause area.)

ARCHITECTURE

Compatible device(s)	Devices and systems with which the solution is compatible.
Deployment method(s)	Method by which the system is deployed.
Global – configuration	Indicate which configurable hierarchies are supported within your platform (i.e., ability to support complex company structures).
Global – localization	The platform can be localized for different countries including language or location specific characters, text layout, capitalization, text sorting, punctuation, pluralization, and national conventions (e.g., units of measure, currency, standards, postal and phone number formats).
Global – languages	List the languages in which the platform can be made available to customer organizations.
Integration	Ability for the system to be integrated with other systems via APIs or custom integration. List the APIs available for integration with other major CSR partner technologies or enterprise platforms.

SECURITY

Admin levels	Available admin levels (e.g., different access for each level based on roles and responsibilities; top admin can access all functionality; lower access admin should be able to approve events, create/run team functionality, etc.)
Privacy – GDPR	Status of compliance with GDPR.
Privacy – CPPA	Status of compliance with CPPA.
Privacy – other	Status of compliance with other major legislation or regulations globally.

VENDOR SUPPORT

The review of the following technology specifications is described per vendor. You do not need to refer to a legend for the technology section of the comparisons.

Support centers	Location of all support centers.
Support center locations	Locations and time zones of the support centers.
Server locations	Location of data servers.
Support levels	Support options (i.e. tiers of service) available for clients of your platform.
Support languages	Languages in which support is offered.
SLA	Standard service level agreement with client base.
Service/ support methods (administrators)	Methods by which support can be accessed or solicited for administrators.

SOLUTION SPOTLIGHTS:

VOLUNTEERING, GIVING & GRANTS

Read this section if you are looking for a technology solution that supports any combination (one or more) of corporate **volunteering**, **giving** and **grants** programs, or if you are looking for more detail on one or more of the following **13 solutions**:

- + Alaya
- + America's Charities Engage Powered by SmartSimple Cloud
- + Benevity
- + Bright Funds
- + CyberGrants
- + GivePulse
- + GivingForce
- + GivingTrax
- + GozAround
- + Givinga
- + SmartSimple
- + WeSpire
- + YourCause + Blackbaud



ALAYA

Alaya empowers companies to build a purpose driven culture and engage employees to make an impact, one act at a time. Alaya is a global platform that enables experiences that bring out the human side of work so that companies and their employees can do good and measure their actions every day.

The platform offers a variety of features that maximize participation for both champions and employees, with access to volunteering and giving activities for employees wherever they are, personalized to their preferences to create an engaging experience. Additionally, the platform offers a catalog of challenges around diversity, equity, inclusion, and sustainability, and facilitates well-being activities. The end-user experience is a layout and activity feed with a social network dimension so that employees can see with whom their colleagues are volunteering, financially supporting, and which challenge/cause areas are most popular. The platform also includes gamification features with individual and team leaderboards, and a virtual currency called Hopeys for rewarding social actions.

Alaya offers assessment for all activities and nonprofits on the platform and allows employees and administrators to nominate organizations. The platform is used in over 72 countries using more than 29 languages. For more information, please see www.alayagood.com.

VENDOR NAME

ALAYA

CLIENT BASE

100+

HEADQUARTERS

Vaud, SUI, EUR

ORG MARKET

Large

FOUNDED

2018

EMPLOYEES

50-100

R&D INVESTMENT

\$1M

FEES STRUCTURE

Setup fee and annual recurring fee based on number of employees, add-ons for tech and service.

DEEP DIVE 1 FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING		GRANTS	
● Proprietary volunteer opportunity database	● NPO validation	● Nonprofit database	● Fundraising pages	● Applicant database	● Grant disbursement
● Active opportunities (proprietary)	● PTO tracking (individual)	● Nonprofit profile overview	● Funding status notifications	● Grant eligibility	● Volunteer grants
● Active virtual opportunities (proprietary)	● PTO tracking (team)	● Nonprofit partner request	● Giving profile	● Forms	● Status notifications
● Real time database (proprietary)	● Dollars for Doers bank	● Nonprofit partner search	● Recognition & reward	● Metadata	● Email records
● Nonprofit access	● System recommendations	● Nonprofit access	● Check & EFT deposits	● Grant application templates	● Nonprofit access
● Volunteer opportunity database integration	● Competitions	● Company foundation	● Direct payment	● Collaboration	● Recognition & reward
● Volunteer opportunity & event search	● Volunteer communities	● In-kind donations	● Fees	● Grant evaluation	● Direct payment
● Nonprofit partner request	● Volunteer profile	● Gift cards	● Disbursement cadence	● Applicant vetting	● Checks & EFT deposits
● Volunteer event creation	● Recognition & reward	● Payroll deductions	● Payment options	● Applicant deduplication	● Dashboards
● Volunteer event types	● Hours logged	● International giving & matching	● Admin self-service	● Review & approval workflow	● Data & exports
● Volunteer event signup	● Post-event surveys	● Disaster relief (external)	● Dashboards	● Approval thresholds	● Real time reporting
● Native volunteering	● Dashboards	● Disaster relief (internal)	● Data & exports	● Grants agreement templates	● Workflows
● Work products	● Data & exports	● Automatic matches	● Future forecasting		
● Automatic time tracking	● Real-time reporting	● Match optimization	● Real time reporting		
● Self-reporting volunteer hours	● Mapping to UN SDGs	● Thresholds	● Tax information		
● Log hours by proxy	● Workflows	● Processing & distribution	● Mapping to UN SDGs		
		● Vetting	● Workflows		

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-way	Two-way
Communications (External)	One-way	Two-way
Sharing (Internal)	Available	Unavailable
Sharing (External)	Available	Unavailable

Includes:

Blog within opportunities, comments and reactions, (in)direct admin communication, all via newsfeed.
Email messages and notifications.

USABILITY

Access	URL	Mobile-friendly	SSO	Username and password		
Automation	Workflows	Notifications	Form auto-population			
Error Identification	Rules and alerts	Field completion	Format validation	Submission warnings and blocks		Native error support
Look & Feel	Logo	Colors	Layout	Social media tags	Localizations	White label
Search	Keyword	Event/opportunity (date range, location, etc.)		Nonprofit/association		

ARCHITECTURE

Compatibility	Windows (browser)	OS (browser)	Linux (browser)	Android (browser)	iOS (browser)	
Deployment	On-premise	Cloud (SaaS)	Hybrid			
Global – configuration	Single entity	Multi-site	Multi-country	Global		
Global – localization	Language or location specific characters		Text layout	Capitalization	Text sorting	Punctuation
	Pluralization		National conventions			
Global – languages	Arabic	Chinese (Simplified)	Chinese (Traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
	extra line for others					
Integration	Out-of-the-box APIs	Custom integration	SSO: Microsoft Azure, Okta, Google; Other: Workday, Workplace, Yammer, SharePoint, Happeo			

PRIVACY & SECURITY

Admin levels	Admin	Supervisor	Users
GDPR	Compliant	Noncompliant	
Privacy – other	Compliant		

3 VENDOR SUPPORT

SUPPORT

Support centers	3 support centers, all organized remotely, available in all time zones					
Support center locations	Barcelona, Spain	Geneva, Switzerland	Paris, France	Cebu, Philippines	New Jersey, United States	
Server locations	Brussels, Belgium					
Support levels	Client admin	User	External; Priority based, 24/7, phone, chat and email.			
Support languages	Arabic	Chinese (Simplified)	Chinese (Traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Luxemburgish	Malay
	Polish	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)
	Spanish (SPA)	Swedish	Thai	Turkish	Vietnamese	Other
SLA	Priority based	Single option	Business hours (1-2 hour response); off hours (4 hour response)			Live chat 24/7
Administrator service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Customer service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Training methods	Online (synchronous)	Online (self-paced)	Online (forums)	Classroom (onsite)	Classroom (offsite)	Third party
Value-add services	Services: program strategy, support for activity sourcing Platform: well-being module, challenges to support sustainability and diversity, equity and inclusion, customer engagement, carbon offsetting, pulse surveys.					

IMPLEMENTATION

Implementation time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
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AMERICA'S CHARITIES ENGAGE POWERED BY SMARTSIMPLE CLOUD

America's Charities inspires employees and organizations to support each other and the causes they care about. They have partnered with SmartSimple Software to launch Engage, an end-to-end giving and CSR solution.

Engage combines America's Charities' customer support and back-end funds management with SmartSimple Cloud technology to deliver a configurable giving, volunteering, and corporate philanthropy platform. Every year America's Charities processes more than one million donations and disburses more than 40,000 payments to nonprofits, while SmartSimple Cloud is used by more than 350 organizations worldwide across more than 192 countries. The Engage platform brings together both worlds so companies can optimize their CSR and social impact. For more information, please see www.charities.org.

VENDOR NAME

America's Charities Engage
Powered by SmartSimple Cloud

CLIENT BASE
32

HEADQUARTERS
Chantilly, VA, USA

ORG MARKET
Mid sized

FOUNDED
1980

EMPLOYEES
11-50

R&D INVESTMENT
Declined to disclose

FEES STRUCTURE

Setup fee and annual service fee. Add-on funds management fee for those services.

DEEP DIVE 1 FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING		GRANTS	
● Proprietary volunteer opportunity database	● NPO validation	● Nonprofit database	● Fundraising pages	● Applicant database	● Grant disbursement
● Active opportunities (proprietary)	● PTO tracking (individual)	● Nonprofit profile overview	● Funding status notifications	● Grant eligibility	● Volunteer grants
● Active virtual opportunities (proprietary)	● PTO tracking (team)	● Nonprofit partner request	● Giving profile	● Forms	● Status notifications
● Real time database (proprietary)	● Dollars for Doers bank	● Nonprofit partner search	● Recognition & reward	● Metadata	● Email records
● Nonprofit access	● System recommendations	● Nonprofit access	● Check and EFT deposits	● Grant application templates	● Nonprofit access
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● Volunteer event creation	● Recognition & reward	● Payroll deductions	● Payment options	● Applicant deduplication	● Dashboards
● Volunteer event types	● Hours logged	● International giving & matching	● Admin self-service	● Review & approval workflow	● Data & exports
● Volunteer event signup	● Post-event surveys	● Disaster relief (external)	● Dashboards	● Approval thresholds	● Real time reporting
● Native volunteering	● Dashboards	● Disaster relief (internal)	● Data & exports	● Grants agreement templates	● Workflows
● Work products	● Data & exports	● Automatic matches	● Future forecasting		
● Automatic time tracking	● Real time reporting	● Match optimization	● Real time reporting		
● Self-reporting volunteer hours	● Mapping to UN SDGs	● Thresholds	● Tax information		
● Log hours by proxy	● Workflows	● Processing & distribution	● Mapping to UN SDGs		
		● Vetting	● Workflows		

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-way	Two-way	Includes: Out-of-the-box functionality for internal messaging and social sharing. News and announcements. Team and volunteer coordinator messaging. Capability for social sharing, inviting clients, family, friends to participate in fundraising activities. Volunteer activities available with a link to activity details and signup through the platform including information about the charity contact and reminder emails and notifications the employee receives as the volunteer activity draws near or has changes. Social sharing; event photo sharing Email, social media sharing
Communications (External)	One-way	Two-way	
Sharing (Internal)	Available	Unavailable	
Sharing (External)	Available	Unavailable	

USABILITY

Access	URL	Mobile friendly	SSO	Username and password		
Automation	Workflows	Notifications	Form auto-population	Open receipts for incoming communications		
Error Identification	Rules and alerts	Field completion	Format validation	Submission warnings and blocks		Native error support
Look & Feel	Logo	Colors	Layout	Social media tags	Localizations	White label
Search	Keyword	Event/opportunity (date Range, location, etc.)		Nonprofit/association		

ARCHITECTURE

Compatibility	Windows (browser)	OS (browser)	Linux (browser)	Android (browser)	iOS (browser)	
Deployment	On-premise	Cloud (SaaS)	Single-tenant	Multi-tenant	Hybrid	
Global – configuration	Single entity	Multi-site	Multi-country	Global		
Global – localization	Language or location specific characters		Text layout	Capitalization	Text sorting	Punctuation
	Pluralization	National conventions	Only custom configuration supports translation			
Global – languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Danish	Dutch
	English (UK)	English (US/CAN)	Finnish	French (CAN)	French (FRA)	Georgian
	German	Greek	Hindi	Hungarian	Italian	Japanese
	Korean	Malay	Nepali	Polish	Portuguese	Romanian
	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)	Swedish	Thai
	Turkish	Vietnamese	Other			
Integration	Out-of-the-box APIs	Custom integration	Including but not limited to: GuideStar, Charity Navigator, VolunteerMatch, US Census, LexisNexis, e-signature providers, Salesforce.			

PRIVACY & SECURITY

Admin levels	Admin	Campaign coordinator	Volunteer coordinator	Grants management
GDPR	Compliant	Noncompliant		
Privacy – other	SOC2 compliant and ISO27001 certified			

3 VENDOR SUPPORT

SUPPORT

Support centers	1					
Support center locations	Chantilly, VA, USA					
Server locations	VA and OR, USA					
Support levels	Client Admin	User	External; help desk via chat, email, phone, web form and FAQs			
Support languages	Arabic	Chinese (simplified)	Chinese (Traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
SLA	Priority based	Single option	Business hours (1-2 hour response); off hours (4 hour response)			
Administrator service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Customer service/ support methods	Phone (toll)	Phone (toll-free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Training methods	Online (synchronous)	Online (self-paced)	Online (forums)	Classroom (onsite)	Classroom (offsite)	Third party
Value-add services	Dedicated client engagement team, library of content, guides, templates, multi-channel employee/help desk support					

Implementation time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
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BENEVITY

Benevity provides companies with the tools to create purpose driven cultures to engage customers, employees, and communities in amplifying the impact of corporate social responsibility.

Benevity is a comprehensive platform that provides access to an extensive global nonprofit database (Benevity Causes Portal), and robust support for implementation, integration, localization efforts and overall client success. The platform offers features and administrator functionality to create a consistent, tailored, and engaging employee experience. Platform administration is supported with detailed permissions levels, a library of stock reports and an integrated, proprietary toolset for highly customizable reporting. Nonprofits can easily engage with Benevity clients through the dedicated Benevity Causes Portal. There is also a Benevity Nonprofit Community Council who helps to guide platform functionality. Broader platform integrations are supported through the Benevity API suite, the Community Impact Portal (a customizable external facing microsite) and Missions. Missions is a feature that aims to help employees adopt new behaviors at work and in their lives through custom, gamified and rewards based challenges. The goal is to engage employees in positive actions and education related to topics such as sustainability, civic engagement, and inclusion. Peer-to-peer fundraising and external fundraising are available in a new feature called Peer Matching as well as in the Community Impact offering. For more information, please see www.benevity.com.

VENDOR NAME

Benevity

CLIENT BASE

700+

ORG MARKET

All markets

EMPLOYEES

501-1000

FEES STRUCTURE

Setup + annual subscription
(volume based)

HEADQUARTERS

Calgary, ALB, CAN

FOUNDED

2008

R&D INVESTMENT

Declined to disclose

DEEP DIVE 1 FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING		GRANTS	
● Proprietary volunteer opportunity database	● NPO validation	● Nonprofit database	● Fundraising pages	● Applicant database	● Grant disbursement
● Active opportunities (proprietary)	● PTO tracking (individual)	● Nonprofit profile overview	● Funding status notifications	● Grant eligibility	● Volunteer grants
● Active virtual opportunities (proprietary)	● PTO tracking (team)	● Nonprofit partner request	● Giving profile	● Forms	● Status notifications
● Real time database (proprietary)	● Dollars for Doers bank	● Nonprofit partner search	● Recognition & reward	● Metadata	● Email records
● Nonprofit access	● System recommendations	● Nonprofit access	● Check & EFT deposits	● Grant application templates	● Nonprofit access
● Volunteer opportunity database integration	● Competitions	● Company foundation	● Direct payment	● Collaboration	● Recognition & reward
● Volunteer opportunity & event search	● Volunteer communities	● In-kind donations	● Fees	● Grant evaluation	● Direct payment
● Nonprofit partner request	● Volunteer profile	● Gift cards	● Disbursement cadence	● Applicant vetting	● Checks & EFT deposits
● Volunteer event creation	● Recognition and reward	● Payroll deductions	● Payment options	● Applicant deduplication	● Dashboards
● Volunteer event types	● Hours logged	● International giving & matching	● Admin self-service	● Review & approval workflow	● Data & exports
● Volunteer event signup	● Post-event surveys	● Disaster relief (external)	● Dashboards	● Approval thresholds	● Real time reporting
● Native volunteering	● Dashboards	● Disaster relief (internal)	● Data & exports	● Grants agreement templates	● Workflows
● Work Products	● Data & exports	● Automatic matches	● Future forecasting		
● Automatic time tracking	● Real time reporting	● Match optimization	● Real time reporting		
● Self-reporting volunteer hours	● Mapping to UN SDGs	● Thresholds	● Tax information		
● Log hours by proxy	● Workflows	● Processing & distribution	● Mapping to UN SDGs		
		● Vetting	● Workflows		

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-way	Two-way	Includes: Blog within opportunities, direct message via teams, (in)direct admin communication Email messages and notifications; direct messaging (grantmaking portal only) News, blogs, event photo sharing Share directly to online communities, social media platforms
Communications (External)	One-way	Two-way	
Sharing (Internal)	Available	Unavailable	
Sharing (External)	Available	Unavailable	

USABILITY

Access	URL	Mobile friendly	SSO	Username and password		
Automation	Workflows	Notifications	Form auto-population	Automatic reminders, task lists		
Error Identification	Rules and alerts	Field completion	Format validation	Submission warnings and blocks	Native error support	
Look & Feel	Logo	Colors	Layout	Social media tags	Localizations	White label
Search	Keyword	Event/opportunity (proximity)		Nonprofit/association	Charity results sorted by popularity	

ARCHITECTURE

Compatibility	Windows (browser)	OS (browser)	Linux (browser)	Android (app)	iOS (app)	
Deployment	On-premise	Cloud (SaaS)	Single-tenant	Multi-tenant	Hybrid	
Global – configuration	Single entity	Multi-site	Multi-country	Global		
Global – localization	Language or location specific characters		Text layout	Capitalization	Text sorting	Punctuation
	Pluralization	National conventions				
Global – languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
Integration	Out-of-the-box APIs	Custom integration	Direct integration with BlueSnap, PayPal, Workday, VolunteerMatch, GlobalGiving			

PRIVACY & SECURITY

Admin Levels	30+ roles including Ad Hoc Reporting User, Auction Manager, Badge Manager, Bulk Email Manager, Campaign Manager, Community Portal Manager, Content Manager, Corporate gift Cards, Dashboard Beta Admin, Dashboard Manager, External Match Manager, Fundraising Manager, Volunteer Manager, Grants Manager, etc.				
GDPR	Compliant	Noncompliant			
Privacy – other	SSAE18 SOC 1 Type 2, shared assessments SIG and PCI DSS				

3 VENDOR SUPPORT

SUPPORT

Support centers	6					
Support center locations	San Mateo, CA, USA	Calgary, AB, CAN	Victoria, BC, CAN	Toronto, ON, CAN	London, UK	Remote
Server locations	Global					
Support levels	Client Admin	User	External			
Support languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
SLA	Priority based	Single option	24/7 (1 hour automated response)			
Administrator service/ support methods	Phone (Toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Customer service/ support methods	Phone (Toll)	Phone (Toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Training methods	Online (synchronous)	Online (self-paced)	Online (forums)	Classroom (onsite)	Classroom (offsite)	Third party
Value-add services	Benevity Impact Labs, Benevity Community, Benevity Client Community					

IMPLEMENTATION

Implementation time	1–3 Months	4–6 Months	7–12 Months	12–18 Months	19–24 Months	24+ Months
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BRIGHT FUNDS

Bright Funds is a global platform designed for employees and CSR leaders that provides functionality enabling giving, matching gifts, volunteer management, grants management and other administrative needs. Donations are processed by the Bright Funds Foundation, a nonprofit organization.

Administrative functionality includes payroll, HRIS, SSO integration, reporting tools, platform training, payment distribution and comprehensive program management.

The fund model is most unique to Bright Funds as users can create funds and either give to one organization or distribute among multiple – this also extends to sharing for peer-to-peer fundraising opportunities. Bright Funds also curates specific cause related funds to provide suggestions. For more information, please see www.brightfunds.org.

VENDOR NAME

Bright Funds

CLIENT BASE

175+

ORG MARKET

All markets

EMPLOYEES

11-50

FEES STRUCTURE

Annual or monthly subscription on employee count; one-time implementation fee may be applicable; transaction fees may be applicable.

HEADQUARTERS

Oakland, CA, USA

FOUNDED

2012

R&D INVESTMENT

\$2M

DEEP DIVE 1 **FEATURES & FUNCTIONALITY**

VOLUNTEERING		GIVING		GRANTS	
○ Proprietary volunteer opportunity database	○ NPO validation	● Nonprofit database	● Fundraising pages	● Applicant database	● Grant disbursement
○ Active opportunities (proprietary)	○ PTO tracking (individual)	● Nonprofit profile overview	● Funding status notifications	○ Grant eligibility	○ Volunteer grants
○ Active virtual opportunities (proprietary)	○ PTO tracking (team)	● Nonprofit partner request	● Giving profile	● Forms	● Status notifications
● Real-time database (proprietary)	● Dollars for Doers bank	● Nonprofit partner search	● Recognition & reward	○ Metadata	○ Email records
○ Nonprofit access	● System recommendations	● Nonprofit access	● Check & EFT deposits	● Grant application templates	● Nonprofit access
● Volunteer opportunity database integration	○ Competitions	● Company foundation	● Direct payment	● Collaboration	● Recognition & reward
● Volunteer opportunity & event search	○ Volunteer communities	○ In-kind donations	● Fees	○ Grant evaluation	● Direct payment
● Nonprofit partner request	● Volunteer profile	● Gift cards	○ Disbursement cadence	● Applicant vetting	● Checks and EFT deposits
● Volunteer event creation	● Recognition & reward	● Payroll deductions	● Payment options	○ Applicant deduplication	● Dashboards
● Volunteer event types	● Hours logged	● International giving & matching	● Admin self-service	● Review and approval workflow	● Data & exports
● Volunteer event signup	○ Post-event surveys	● Disaster relief (external)	● Dashboards	○ Approval thresholds	○ Real time reporting
● Native volunteering	● Dashboards	○ Disaster relief (internal)	● Data & exports	○ Grants agreement templates	● Workflows
○ Work products	● Data & exports	● Automatic matches	○ Future forecasting		
● Automatic time tracking	● Real time reporting	● Match optimization	● Real time reporting		
● Self-reporting volunteer hours	○ Mapping to UN SDGs	● Thresholds	● Tax information		
● Log hours by proxy	● Workflows	● Processing & distribution	○ Mapping to UN SDGs		
		● Vetting	● Workflows		

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-way	Two-way	Includes: Volunteer event and fundraiser sharing External fundraisers, social media sharing
Communications (External)	One-way	Two-way	
Sharing (Internal)	Available	Unavailable	
Sharing (External)	Available	Unavailable	

USABILITY

Access	URL	Mobile friendly	SSO	Username & password	
Automation	Workflows	Notifications	Form auto-population	Automatic or manual approvals	
Error Identification	Rules and alerts	Field completion	Format validation	Submission warnings and blocks	Native error support
Look & Feel	Logo	Colors	Layout	Social media tags	Localizations
Search	Keyword	Event/opportunity (Date range, location, etc.)		Nonprofit/association; volunteer skills	

ARCHITECTURE

Compatibility	Windows (browser)	OS (browser)	Linux (browser)	Android (browser)	iOS (browser)
Deployment	On-premise	Cloud (SaaS)	Single-tenant	Multi-tenant	Hybrid
Global – configuration	Single entity	Multi-site	Multi-country	Global	
Global – localization	Language or location specific characters		Text layout	Capitalization	Text sorting
	Pluralization	National conventions	Only custom configuration supports translation		
Global – languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek
	Hungarian	Italian	Japanese	Korean	Malay
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)
	Swedish	Thai	Turkish	Vietnamese	Other
Integration	Out-of-the-box APIs	Custom integration	ADP, rippling, Facebook for Work, SFTP integrations		

PRIVACY & SECURITY

Admin levels	Global admin, volunteer event organizer, end user	
GDPR	Compliant	Noncompliant
Privacy – other	SOC 2 Type 2	

3 VENDOR SUPPORT

SUPPORT

Support centers	1					
Support center locations	Oakland, CA, USA					
Server locations	USA					
Support levels	Client admin	User	External			
Support languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
SLA	Priority based	Single option	Business hours (1–2 hour response); off hours (4 hour response); within 1 business day			
Administrator service/ support methods	Phone (Toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email); 24/7 help center
Customer service/ support methods	Phone (Toll)	Phone (Toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email); 24/7 help center
Training methods	Online (synchronous)	Online (self-paced)	Online (forums)	Classroom (onsite)	Classroom (offsite)	Third party
Value-add services	Program consultation support; communications support; cause area recommendations; disaster response support					

IMPLEMENTATION

Implementation time	1–3 Months	4–6 Months	7–12 Months	12–18 Months	19–24 Months	24+ Months
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CYBERGRANTS

Although CyberGrants’ roots are in grantmaking functionality, they have over 15 years of experience optimizing both Employee Volunteering and Giving & Matching programs to provide a single solution for all workplace citizenship programs.

CyberGrants offers a solution that enables clients of all sizes, across various industries, with the capability to tailor the platform to reflect individual corporate programs ranging from simple standard solutions to complex configurations. The core of the platform is an agile workflow engine utilizing a unified data warehouse. CyberGrants offers intuitive interfaces with clean visual elements, native viral engagement capabilities including gamification features to reward employee volunteers, a heat map categorized by geography for administrators upon login, a notes feature for the review process of individual grants, a unique collaboration cc email address for grantmakers instead of using their email address and a toolbox of additional functionality. To measure your giving to impact ratio, CyberGrants Insights, their analytics platform, allows you to organize, optimize, adapt and enable programs with a hands-on approach to understanding and exploring your data for real time decision making and response when emerging needs arise. A few new features include an option for nonprofits to keep a golden record in their system regardless of the grantmaker and an expense/budget template to edit rows and columns right in the application. For more information, please see www.cybergrants.com.

VENDOR NAME

CyberGrants

CLIENT BASE

450

ORG MARKET

Large

EMPLOYEES

250-500

HEADQUARTERS

Andover, MA, USA

FOUNDED

1999

R&D INVESTMENT

-20% Revenue

FEES STRUCTURE

One-time implementation and annual subscription (volume based).

DEEP DIVE 1 **FEATURES & FUNCTIONALITY**

VOLUNTEERING		GIVING		GRANTS	
Proprietary volunteer opportunity database	NPO validation	Nonprofit database	Fundraising pages	Applicant database	Grant disbursement
Active opportunities (proprietary)	PTO tracking (Individual)	Nonprofit profile overview	Funding status notifications	Grant eligibility	Volunteer grants
Active virtual opportunities (proprietary)	PTO tracking (team)	Nonprofit partner request	Giving profile	Forms	Status notifications
Real time database (proprietary)	Dollars for Doers bank	Nonprofit partner search	Recognition & reward	Metadata	Email records
Nonprofit access	System recommendations	Nonprofit access	Check & EFT deposits	Grant application templates	Nonprofit access
Volunteer opportunity database integration	Competitions	Company foundation	Direct payment	Collaboration	Recognition & reward
Volunteer opportunity & event search	Volunteer communities	In-kind donations	Fees	Grant evaluation	Direct payment
Nonprofit partner request	Volunteer profile	Gift cards	Disbursement cadence	Applicant vetting	Checks and EFT deposits
Volunteer event creation	Recognition and reward	Payroll deductions	Payment options	Applicant deduplication	Dashboards
Volunteer event types	Hours logged	International giving & matching	Admin self-service	Review and approval workflow	Data & exports
Volunteer event signup	Post-event surveys	Disaster relief (external)	Dashboards	Approval thresholds	Real time reporting
Native volunteering	Dashboards	Disaster relief (internal)	Data & exports	Grants agreement templates	Workflows
Work products	Data & exports	Automatic matches	Future forecasting		
Automatic time tracking	Real time reporting	Match optimization	Real time reporting		
Self-reporting volunteer hours	Mapping to UN SDGs	Thresholds	Tax information		
Log hours by proxy	Workflows	Processing & distribution	Mapping to UN SDGs		
		Vetting	Workflows		

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)
 Communications (External)
 Sharing (Internal)
 Sharing (External)

One-way	Two-way
One-way	Two-way
Available	Unavailable
Available	Unavailable

Includes:

Activity feed enables event photo sharing , etc.
 Email, social media sharing (Facebook, Twitter, LinkedIn)

USABILITY

Access
 Automation
 Error Identification
 Look & Feel
 Search

URL	Mobile friendly	SSO	Username & password		
Workflows	Notifications	Form auto-population	Automatically adds, removes, updates users; highly configurable		
Rules and alerts	Field completion	Format validation	Submission warnings and blocks	Native error support	
Logo	Colors	Layout	Social media tags	Localizations	White label
Keyword	Event/opportunity (Date range, location, etc.)	Nonprofit/association			

ARCHITECTURE

Compatibility
 Deployment
 Global – configuration
 Global – localization

 Global – languages

 Integration

Windows (browser)	OS (browser)	Linux (browser)	Android (browser)	iOS (browser)	
On-premise	Cloud (SaaS)	Single-tenant	Multi-tenant	Hybrid	
Single entity	Multi-site	Multi-country	Global		
Language or location specific characters		Text layout	Capitalization	Text sorting	Punctuation
Pluralization	National conventions				
Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
Hungarian	Italian	Japanese	Korean	Malay	Polish
Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
Swedish	Thai	Turkish	Vietnamese	Other	
Out-of-the-box APIs	Custom integration	Including: HCM/HRM, Accounts Payable, Vendor Management, Payroll, Single Sign On, E-Signature (i.e. DocuSign), Banking System, Volunteerism Partners/Channels (i.e. VolunteerMatch, UStride, Taproot), Datawarehouse / Data lake			

PRIVACY & SECURITY

Admin levels
 GDPR

Admin, budget, basic, viewer, strict basic, strict viewer	
Compliant	Noncompliant

3 VENDOR SUPPORT

SUPPORT

Support centers
 Support center locations
 Server locations
 Support levels
 Support languages

2					
Andover, MA and Princeton, NJ, USA					
Andover, MA					
Client admin	User	External			
Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
Hungarian	Italian	Japanese	Korean	Malay	Polish
Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
Swedish	Thai	Turkish	Vietnamese	Other	
Priority based	Single option	Business hours (1-2 hour response); off hours (4 hour response)			
Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Online (synchronous)	Online (self-paced)	Online (forums)	Classroom (onsite)	Classroom (offsite)	Third party
FrontDoor (nonprofit portal), annual customer conference, digital events/webinars and dedicated account team					

IMPLEMENTATION

Implementation time

1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
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GIVEPULSE

GivePulse enables everyone to engage, organize, and understand the impact of positive social change. The mission of GivePulse is to activate all individuals and their affinity/employee resource groups to lift their community to new heights.

They do this by providing a platform to list, find, organize, measure, and story-tell the impacts of employee giving, community engagement, philanthropy, service-learning, and volunteerism. From day one, their goal has been to solve tough social problems and grand challenges through the use of technology. Today, keeping true to that original mission, their civic engagement platform supports and scales the work of thousands of nonprofits, associations, institutions, businesses, and organizations. To support modern volunteering, GivePulse has introduced unique features to accommodate mobile employees, such as native iOS and Android Apps and QR mobile check-in. Due to their large university and college network (with Ivy, private, public research, and community college institutions), GivePulse enables businesses with opportunities to engage in research and meet future civically engaged candidates. Additionally, their leaderboard functionality is gamified and tied to employees' giving and volunteering activities. Nonprofits and community partners receive complimentary access to the platform, including a dedicated online giving page and event management capabilities. For more information, please see www.givepulse.com.

VENDOR NAME

GivePulse, Inc.

CLIENT BASE

351

HEADQUARTERS

Austin, TX, USA

ORG MARKET

Midsized

FOUNDED

2012

EMPLOYEES

30

R&D INVESTMENT

\$600,000

FEES STRUCTURE

Three levels based on employee volume, billed annually, monthly or with multi-year agreements.

DEEP DIVE 1 **FEATURES & FUNCTIONALITY**

VOLUNTEERING		GIVING		GRANTS	
● Proprietary volunteer opportunity database	● NPO validation	● Nonprofit database	● Fundraising pages	● Applicant database	● Grant disbursement
● Active opportunities (proprietary)	● PTO tracking (individual)	● Nonprofit profile overview	● Funding status notifications	● Grant eligibility	● Volunteer grants
● Active virtual opportunities (proprietary)	● PTO tracking (team)	● Nonprofit partner request	● Giving profile	● Forms	● Status notifications
● Real time database (proprietary)	● Dollars for Doers bank	● Nonprofit partner search	● Recognition & reward	● Metadata	● Email records
● Nonprofit access	● System recommendations	● Nonprofit access	○ Check and EFT deposits	● Grant application templates	● Nonprofit access
● Volunteer opportunity database integration	● Competitions	● Company foundation	● Direct payment	● Collaboration	● Recognition & reward
● Volunteer opportunity & event search	● Volunteer communities	● In-kind donations	● Fees	● Grant evaluation	● Direct payment
● Nonprofit partner request	● Volunteer profile	● Gift cards	● Disbursement cadence	● Applicant vetting	○ Checks and EFT deposits
● Volunteer event creation	● Recognition and reward	● Payroll deductions	● Payment options	● Applicant deduplication	● Dashboards
● Volunteer event types	● Hours logged	● International giving & matching	● Admin self-service	● Review & approval workflow	● Data & exports
● Volunteer event sign up	● Post-event surveys	● Disaster relief (external)	● Dashboards	● Approval thresholds	● Real time reporting
● Native volunteering	● Dashboards	● Disaster relief (internal)	● Data & exports	● Grants agreement templates	● Workflows
● Work products	● Data & exports	● Automatic matches	● Future forecasting		
● Automatic Time Tracking	● Real time reporting	● Match optimization	● Real time reporting		
● Self-reporting volunteer hours	● Mapping to UN SDGs	● Thresholds	● Tax information		
● Log hours by proxy	● Workflows	● Processing & distribution	● Mapping to UN SDGs		
		● Vetting	● Workflows		

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-way	Two-way
Communications (External)	One-way	Two-way
Sharing (Internal)	Available	Unavailable
Sharing (External)	Available	Unavailable

USABILITY

Access	URL	Mobile friendly	SSO	Username & password		
Automation	Workflows	Notifications	Form auto-population			
Error Identification	Rules and alerts	Field completion	Format validation	Submission warnings and blocks		Native error support
Look & Feel	Logo	Colors	Layout	Social media tags	Localizations	White label
Search	Keyword	Event/opportunity (Date range, location, etc.)		Nonprofit/association	Age restrictions, SDGs	

ARCHITECTURE

Compatibility	Windows (browser)	OS (browser)	Linux (browser)	Android (browser)	iOS (browser)	
Deployment	On-premise	Cloud (SaaS)	Single-tenant	Multi-tenant	Hybrid	
Global – configuration	Single entity	Multi-site	Multi-country	Global		
Global – localization	Language or location specific characters		Text layout	Capitalization	Text sorting	Punctuation
	Pluralization	National conventions				
Global – languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
Integration	Out-of-the-box APIs	Custom integration	HRIS platforms including Workday, Oracle, UltiPro, PeopleSoft, etc. and ERPs/CRMs including Salesforce, SAP, Learning Management Systems, etc.			

PRIVACY & SECURITY

Admin levels	Global admin, sub-group admin, event manager, gift matching admin, volunteer matching admin, check-in attendant	
GDPR	Compliant	Noncompliant
Privacy – other		

3 VENDOR SUPPORT

SUPPORT

Support centers	3					
Support center locations	Austin, TX, USA					
Server locations	USA; powered by Amazon Web Services and Google Cloud					
Support levels	Client admin	User	External			
Support languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
SLA	Priority based	Single option	Business hours (1-2 hour response); off hours (4 hour response); within 3 business hours			
Administrator service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Customer service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Training methods	Online (synchronous)	Online (self-paced)	Online (forums)	Classroom (onsite)	Classroom (offsite)	Third party
Value-add services	Ghost CSR professional program for clients who don't have a CSR leader					

IMPLEMENTATION

Implementation time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
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GIVINGFORCE

GivingForce helps purpose driven businesses embed a culture of doing good. Currently being used in 73 countries, GivingForce brings all of your activities together in one central platform with customizable modules including payroll giving, matching, volunteering, grants, corporate donations and more.

Everything is designed for minimum administration. GivingForce augments its technology solutions with a due diligence service, local and international payments, administrative support and GivingPurpose, all of which are included in its approach to help companies align purpose to their brand.

Everything in GivingForce is uniquely identified and tagged to capture any statistic a company is interested in, whether it be the SDGs or something more specific. It includes risk potential functionality that is useful for managing reputational and financial risk. All of this information can be integrated and visualized using the built-in reporting feature or exported for further analysis. For more information, please see www.givingforce.com.

VENDOR NAME

GivingForce

CLIENT BASE

6

HEADQUARTERS

Harrow, UK

ORG MARKET

Large

FOUNDED

2011

EMPLOYEES

32

R&D INVESTMENT

\$450,000

FEES STRUCTURE

Annual license based on number of users, modules and configuration; additional usage fee based on number and type of transactions/services used; per user license available for smaller organizations.

DEEP DIVE 1 **FEATURES & FUNCTIONALITY**

VOLUNTEERING		GIVING		GRANTS	
Proprietary volunteer opportunity database	NPO validation	Nonprofit database	Fundraising pages	Applicant database	Grant disbursement
Active opportunities (proprietary)	PTO tracking (individual)	Nonprofit profile overview	Funding status notifications	Grant eligibility	Volunteer grants
Active virtual opportunities (proprietary)	PTO tracking (team)	Nonprofit partner request	Giving profile	Forms	Status notifications
Real time database (proprietary)	Dollars for Doers bank	Nonprofit partner search	Recognition & reward	Metadata	Email records
Nonprofit access	System recommendations	Nonprofit access	Check and EFT deposits	Grant application templates	Nonprofit access
Volunteer opportunity database integration	Competitions	Company foundation	Direct payment	Collaboration	Recognition & reward
Volunteer opportunity & event search	Volunteer communities	In-kind donations	Fees	Grant evaluation	Direct payment
Nonprofit partner request	Volunteer profile	Gift cards	Disbursement cadence	Applicant vetting	Checks & EFT deposits
Volunteer event creation	Recognition & reward	Payroll deductions	Payment options	Applicant deduplication	Dashboards
Volunteer event types	Hours logged	International giving & matching	Admin self-service	Review and approval workflow	Data & exports
Volunteer event signup	Post-event surveys	Disaster relief (external)	Dashboards	Approval thresholds	Real time reporting
Native volunteering	Dashboards	Disaster relief (internal)	Data & exports	Grants agreement templates	Workflows
Work products	Data & exports	Automatic matches	Future forecasting		
Automatic time tracking	Real-time reporting	Match optimization	Real time reporting		
Self-reporting volunteer hours	Mapping to UN SDGs	Thresholds	Tax information		
Log hours by proxy	Workflows	Processing & distribution	Mapping to UN SDGs		
		Vetting	Workflows		

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-way	Two-way
Communications (External)	One-way	Two-way
Sharing (Internal)	Available	Unavailable
Sharing (External)	Available	Unavailable

USABILITY

Access	URL	Mobile friendly	SSO	Username & password		
Automation	Workflows	Notifications	Form auto-population			
Error Identification	Rules and alerts	Field completion	Format validation	Submission warnings and blocks		Native error support
Look & Feel	Logo	Colors	Layout	Social media tags	Localizations	White label
Search	Keyword	Event/opportunity (Date range, location, etc.)		Nonprofit/association		

ARCHITECTURE

Compatibility	Windows (browser)	OS (browser)	Linux (browser)	Android (browser)	iOS (browser)	
Deployment	On-premise	Cloud (SaaS)	Single-tenant	Multi-tenant	Hybrid	
Global – configuration	Single entity	Multi-site	Multi-country	Global		
Global – localization	Language or location specific characters		Text layout	Capitalization	Text sorting	Punctuation
	Pluralization	National conventions				
Global – languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
Integration	Out-of-the-box APIs	Custom integration				

PRIVACY & SECURITY

Admin levels	Unavailable	
GDPR	Compliant	Noncompliant
Privacy – other	Compliant	Noncompliant

3 VENDOR SUPPORT

SUPPORT

Support centers	4					
Support center locations	UK, Bulgaria, Hungary, India, USA (coming soon)					
Server locations	UK	Europe				
Support levels	Client admin	User	External			
Support languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
SLA	Priority based	Single option	Business hours (1-2 hour response); off hours (4 hour response); 4 business hours			
Administrator service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email); regular customer success calls
Customer service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Training methods	Employee support is available as a custom package; admin training is part of onboarding					
Value-add services	Online (synchronous)	Online (self-paced)	Online (forums)	Classroom (onsite)	Classroom (offsite)	Third party
	Strategy and program design, program support, custom/enhanced due diligence, custom development					

IMPLEMENTATION

Implementation time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
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GIVINGTRAX

GivingTrax connects companies, nonprofits and individuals in one network. All organizational and individual users are assigned their own shareable profile that captures their philanthropic activity.

Functionality is easy to deploy with well organized and intuitive administrator tools, including prebuilt workflows and configuration options for more advanced requirements. The platform offers unique collaboration opportunities for organizations, as it enables multiple companies to set up a single opportunity or cause; for example, a disaster relief fund or combined volunteering event. GivingTrax also offers unique portability options for users. Employees can retain ownership of their giving accounts despite their status of employment with any given organization. Employee giving accounts can be associated with the company or be independent (in the case of retirees, for example).

For nonprofits, GivingTrax offers the ability to view contributions from any individuals or organizations on the network in a single profile. Further, funds are disbursed immediately at the time of donation (once banking information is registered). GivingTrax provides regular software updates and platform enhancements based on routine development and client requests. For more information, please see www.givingtrax.com.

VENDOR NAME

GivingTrax Cloud Software

CLIENT BASE

150+

HEADQUARTERS

Tacoma, WA, USA

ORG MARKET

All (small, medium, large/enterprise)

FOUNDED

2010

EMPLOYEES

11-50

R&D INVESTMENT

\$1.8M

FEES STRUCTURE

Monthly subscription with annual option (volume based) and one-time campaign licenses; special pricing for smaller companies with less than 100 employees.

DEEP DIVE 1 FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING		GRANTS	
● Proprietary volunteer opportunity database	● NPO validation	● Nonprofit database	● Fundraising pages	● Applicant database	● Grant disbursement
● Active opportunities (proprietary)	● PTO tracking (individual)	● Nonprofit profile overview	● Funding status notifications	● Grant eligibility	● Volunteer grants
● Active virtual opportunities (proprietary)	● PTO tracking (team)	● Nonprofit partner request	● Giving profile	● Forms	● Status notifications
● Real time database (proprietary)	● Dollars for Doers bank	● Nonprofit partner search	● Recognition & reward	● Metadata	● Email records
● Nonprofit access	● System recommendations	● Nonprofit access	● Check & EFT deposits	● Grant application templates	● Nonprofit access
● Volunteer opportunity database integration	● Competitions	● Company foundation	● Direct payment	● Collaboration	● Recognition & reward
● Volunteer opportunity & event search	● Volunteer communities	● In-kind donations	● Fees	● Grant evaluation	● Direct payment
● Nonprofit partner request	● Volunteer profile	● Gift cards	● Disbursement cadence	● Applicant vetting	● Checks & EFT deposits
● Volunteer event creation	● Recognition & reward	● Payroll deductions	● Payment options	● Applicant deduplication	● Dashboards
● Volunteer event types	● Hours logged	● International giving & matching	● Admin self-service	● Review & approval workflow	● Data & exports
● Volunteer event signup	● Post-event surveys	● Disaster relief (external)	● Dashboards	● Approval thresholds	● Real time reporting
● Native volunteering	● Dashboards	● Disaster relief (internal)	● Data & exports	● Grants agreement templates	● Workflows
● Work products	● Data & exports	● Automatic matches	● Future forecasting		
● Automatic time tracking	● Real time reporting	● Match optimization	● Real time reporting		
● Self-reporting volunteer hours	● Mapping to UN SDGs	● Thresholds	● Tax information		
● Log hours by proxy	● Workflows	● Processing & distribution	● Mapping to UN SDGs		
		● Vetting	● Workflows		

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-way	Two-way
Communications (External)	One-way	Two-way
Sharing (Internal)	Available	Unavailable
Sharing (External)	Available	Unavailable

USABILITY

Access	URL	Mobile friendly	SSO	Username & password	SAML-compliant, 2FA supported	
Automation	Workflows	Notifications	Form auto-population			
Error Identification	Rules and alerts	Field completion	Format validation	Submission warnings and blocks	Native error support	
Look & Feel	Logo	Colors	Layout	Social media tags	Localizations	White label
Search	Keyword	Event/opportunity	Nonprofit/association			

ARCHITECTURE

Compatibility	Windows (browser)	OS (browser)	Linux (browser)	Android (browser)	iOS (browser)	*2020 roadmap (mobile app)
Deployment	On-premise	Cloud (SaaS)	Single-tenant	Multi-tenant	Hybrid	
Global – configuration	Single entity	Multi-site	Multi-country	Global		
Global – localization	Language or location specific characters		Text layout	Capitalization	Text sorting	Punctuation
	Pluralization	National conventions	Only custom configuration supports translation			
Global – languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
	Spanish and French by year end 2021 and remaining EU languages available in 2022					
Integration	Out-of-the-box APIs	Custom integration				

PRIVACY & SECURITY

Admin levels	Global admin, top admin, admin, restricted admin (various levels), comment admin, view only admin
GDPR	Compliant Noncompliant

3 VENDOR SUPPORT

SUPPORT

Support centers	2					
Support center locations	USA	India				
Server locations	TX, USA					
Support levels	Client Admin	User	External			
Support languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
SLA	Priority based	Single option	Audience based: biz admins (2 hour response); employees (same day response); nonprofits (24-hour response)			
Administrator service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
	Knowledge base; dedicated support is optionally available and online forums are optionally available at client request					
Customer service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
	Knowledge base; dedicated support is optionally available					
Training methods	Online (synchronous)	Online (self-paced)	Online (forums)	Classroom (onsite)	Classroom (offsite)	Third party
	Teams, Zoom, Webex Training, and Training Documentation					
Value-add services	Program support and outsourced program management is available along with project management and advisory services. Ongoing support includes updating giving, matching, volunteering, and grants management programs as needed along with creating disaster response campaigns.					

IMPLEMENTATION

Implementation time	1-3 Months for Enterprise Edition	4-6 Months	7-12 Months	12-18 Months	19-24 Months
	24+ Months	Less than a day for Community & Pro editions			

GOZAROUND

GozAround uses a marketplace approach to connect companies, nonprofits, and individuals in one ecosystem. Similar to popular social media platforms, all participants have a shareable profile that captures and displays their social impact.

Employees and retirees alike can associate their profiles with current or past companies as a way to participate in collective social impact. Their specialty is working with mid-sized companies who do not have dedicated CSR staff or formalized programs as they also have an implementation solution called Impact Plus to help companies navigate using the platform.

The user interface and social media style mechanics drives GozAround user participation. Offerings include personal profiles, goal setting, news feeds, and some gamification features. Relevant content is pushed to the user news feed based on individual profiles to connect users with causes they are most passionate about. The administrator experience is enriched with dashboard reporting tools that centralize information from all employee users. Nonprofits also have access to a profile of their own, which allows them to post opportunities and monitor activity. GozAround is focused on continuously evolving the platform according to customer feedback and market trends. For more information, please see www.gozaround.com.

VENDOR NAME

GozAround

CLIENT BASE

610

HEADQUARTERS

Edmonton,
Alberta, CA

ORG MARKET

Mid sized

FOUNDED

2014

EMPLOYEES

2-10

R&D INVESTMENT

\$100,000

FEES STRUCTURE

Annual subscription (volume based) and transaction fees.

DEEP DIVE 1 **FEATURES & FUNCTIONALITY**

VOLUNTEERING		GIVING		GRANTS	
● Proprietary volunteer opportunity database	● NPO validation	● Nonprofit database	○ Fundraising pages	● Applicant database	● Grant disbursement
● Active opportunities (proprietary)	● PTO tracking (individual)	● Nonprofit profile overview	○ Funding status notifications	○ Grant eligibility	● Volunteer grants
● Active virtual opportunities (proprietary)	● PTO Tracking (Team)	● Nonprofit partner request	● Giving profile	● Forms	○ Status notifications
● Real time database (proprietary)	● Dollars for Doers bank	● Nonprofit partner search	● Recognition & reward	● Metadata	○ Email records
● Nonprofit access	● System recommendations	● Nonprofit access	○ Check & EFT deposits	● Grant application templates	● Nonprofit access
○ Volunteer opportunity database integration	● Competitions	● Company foundation	○ Direct payment	● Collaboration	○ Recognition & reward
● Volunteer opportunity & event search	● Volunteer communities	● In-kind donations	●* Fees	● Grant evaluation	○ Direct payment
● Nonprofit partner request	● Volunteer profile	○ Gift cards	● Disbursement cadence	● Applicant vetting	● Checks & EFT deposits
● Volunteer event creation	● Recognition & reward	○ Payroll deductions	● Payment options	○ Applicant deduplication	● Dashboards
● Volunteer event types	● Hours logged	● International giving & matching	● Admin self-service	● Review & approval workflow	● Data & exports
● Volunteer event signup	● Post-event surveys	● Disaster relief (external)	● Dashboards	● Approval thresholds	● Real time reporting
○ Native volunteering	● Dashboards	● Disaster relief (internal)	● Data & exports	○ Grants agreement templates	● Workflows
● Work Products	● Data & exports	● Automatic matches	○ Future forecasting		
○ Automatic time tracking	● Real-time reporting	● Match optimization	● Real time reporting		
● Self-reporting volunteer hours	● Mapping to UN SDGs	● Thresholds	● Tax information		
● Log hours by proxy	○ Workflows	● Processing & distribution	● Mapping to UN SDGs		
		● Vetting	● Workflows		

*In progress

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-way	Two-way	Includes:		
Communications (External)	One-way	Two-way	Message boards (admin-to-one; admin-to-all); direct messaging (project based)		
Sharing (Internal)	Available	Unavailable	Direct messaging (volunteer-nonprofit)		
Sharing (External)	Available	Unavailable	Suggested posts within platform		
			Social media sharing		

USABILITY

Access	URL	Mobile friendly	SSO	Username & password	
Automation	Workflows	Notifications	Form auto-population		
Error Identification	Rules and alerts	Field completion	Format validation	Submission warnings and blocks	Native error support
Look & Feel	Logo	Colors	Layout	Social media tags	Localizations
Search	Keyword	Event/opportunity (Location, duration, cause, etc.)			Nonprofit/association

ARCHITECTURE

Compatibility	Windows (browser)	OS (browser)	Linux	Android (app)	iOS (app)
Deployment	On-premise	Cloud (SaaS)	Single-tenant	Multi-tenant	Hybrid
Global – configuration	Single entity	Multi-site	Multi-country	Global	
Global – localization	Language or location specific characters		Text layout	Capitalization	Text sorting
	Pluralization	National conventions	Only custom configuration supports translation		
Global – languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek
	Hungarian	Italian	Japanese	Korean	Malay
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)
	Swedish	Thai	Turkish	Vietnamese	Other
Integration	Unavailable				

PRIVACY & SECURITY

Admin Levels	Owner	Admin	Editor	Viewer
GDPR	Compliant	Noncompliant		

3 VENDOR SUPPORT

SUPPORT

Support centers	1				
Support center locations	Edmonton, AB, Canada				
Server locations	USA	Canada			
Support levels	Client admin	User	External		
Support languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek
	Hungarian	Italian	Japanese	Korean	Malay
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)
	Swedish	Thai	Turkish	Vietnamese	Other
SLA	Priority-Based	Single Option	Business hours (1 to 2-hour response); Off-hours (4-hour response)		
Administrator service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)
Customer service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)
Training methods	Online (synchronous)	Online (self-paced)	Online (forums)	Classroom (onsite)	Classroom (offsite)
	Custom onboarding and training per client				
Value-add services	Historical data entry, program advisory services, custom development, custom training and staff onboarding, marketing/PR support.				

IMPLEMENTATION

Implementation time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
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GIVINGA

Givinga is redefining philanthropy, providing open access to modern tools and technology that deliver purpose. Their philanthropic technology unlocks the potential of charitable giving to spark innovation, drive meaningful brand engagement, and unify business and societal impact.

Overall, Givinga powers giving experiences and their primary focus is to sell and distribute through partners and platforms. They offer a diverse solution that allows partners to either use a white label technology or their API.

Unique features include the ability to track carbon footprint and purchase carbon offsets. Additionally, their donor advised fund technology automates tax recognition and receipts, flexibly manages charitable fund account balances and donations delivery for global enterprise clients. They also offer the functionality to create and support employee relief funds which enables companies to provide charitable grants direct to qualifying employees in need as well as fully manage grant requests from initial request to full payment processing and tracking. For more information, please see www.givinga.com.

VENDOR NAME

Givinga

CLIENT BASE

55

HEADQUARTERS

Boston, MA, USA

ORG MARKET

Mid sized

FOUNDED

2015

EMPLOYEES

15

R&D INVESTMENT

\$3.5M

FEES STRUCTURE

Licensing per user and/or per transaction or usage fee – client can choose fee model.

DEEP DIVE 1 **FEATURES & FUNCTIONALITY**

VOLUNTEERING		GIVING		GRANTS	
<input type="checkbox"/> Proprietary volunteer opportunity database	<input type="checkbox"/> NPO validation	<input checked="" type="checkbox"/> Nonprofit database	<input checked="" type="checkbox"/> Fundraising pages	<input checked="" type="checkbox"/> Applicant database	<input checked="" type="checkbox"/> Grant disbursement
<input type="checkbox"/> Active opportunities (proprietary)	<input checked="" type="checkbox"/> PTO tracking (Individual)	<input checked="" type="checkbox"/> Nonprofit profile overview	<input checked="" type="checkbox"/> Funding status notifications	<input checked="" type="checkbox"/> Grant eligibility	<input checked="" type="checkbox"/> Volunteer grants
<input type="checkbox"/> Active virtual opportunities (proprietary)	<input checked="" type="checkbox"/> PTO tracking (team)	<input checked="" type="checkbox"/> Nonprofit partner request	<input checked="" type="checkbox"/> Giving profile	<input checked="" type="checkbox"/> Forms	<input checked="" type="checkbox"/> Status notifications
<input type="checkbox"/> Real time database (proprietary)	<input checked="" type="checkbox"/> Dollars for Doers bank	<input checked="" type="checkbox"/> Nonprofit partner search	<input checked="" type="checkbox"/> Recognition & reward	<input checked="" type="checkbox"/> Metadata	<input checked="" type="checkbox"/> Email records
<input type="checkbox"/> Nonprofit access	<input type="checkbox"/> System recommendations	<input checked="" type="checkbox"/> Nonprofit access	<input checked="" type="checkbox"/> Check and EFT deposits	<input checked="" type="checkbox"/> Grant application templates	<input checked="" type="checkbox"/> Nonprofit access
<input checked="" type="checkbox"/> Volunteer opportunity database integration	<input type="checkbox"/> Competitions	<input checked="" type="checkbox"/> Company foundation	<input checked="" type="checkbox"/> Direct payment	<input checked="" type="checkbox"/> Collaboration	<input checked="" type="checkbox"/> Recognition and reward
<input checked="" type="checkbox"/> Volunteer opportunity & event search	<input type="checkbox"/> Volunteer communities	<input checked="" type="checkbox"/> In-kind donations	<input checked="" type="checkbox"/> Fees	<input checked="" type="checkbox"/> Grant evaluation	<input checked="" type="checkbox"/> Direct payment
<input type="checkbox"/> Nonprofit partner request	<input checked="" type="checkbox"/> Volunteer profile	<input checked="" type="checkbox"/> Gift cards	<input checked="" type="checkbox"/> Disbursement cadence	<input checked="" type="checkbox"/> Applicant vetting	<input checked="" type="checkbox"/> Checks & EFT deposits
<input type="checkbox"/> Volunteer event creation	<input checked="" type="checkbox"/> Recognition & reward	<input checked="" type="checkbox"/> Payroll deductions	<input checked="" type="checkbox"/> Payment options	<input checked="" type="checkbox"/> Applicant deduplication	<input checked="" type="checkbox"/> Dashboards
<input type="checkbox"/> Volunteer event types	<input checked="" type="checkbox"/> Hours logged	<input checked="" type="checkbox"/> International giving & matching	<input checked="" type="checkbox"/> Admin self-service	<input checked="" type="checkbox"/> Review and approval workflow	<input checked="" type="checkbox"/> Data & exports
<input type="checkbox"/> Volunteer event signup	<input type="checkbox"/> Post-event surveys	<input checked="" type="checkbox"/> Disaster relief (external)	<input checked="" type="checkbox"/> Dashboards	<input checked="" type="checkbox"/> Approval thresholds	<input checked="" type="checkbox"/> Real time reporting
<input type="checkbox"/> Native volunteering	<input checked="" type="checkbox"/> Dashboards	<input checked="" type="checkbox"/> Disaster relief (internal)	<input checked="" type="checkbox"/> Data & exports	<input checked="" type="checkbox"/> Grants agreement templates	<input checked="" type="checkbox"/> Workflows
<input type="checkbox"/> Work products	<input checked="" type="checkbox"/> Data & exports	<input checked="" type="checkbox"/> Automatic matches	<input checked="" type="checkbox"/> Future forecasting		
<input type="checkbox"/> Automatic time tracking	<input checked="" type="checkbox"/> Real-time reporting	<input checked="" type="checkbox"/> Match optimization	<input checked="" type="checkbox"/> Real time reporting		
<input checked="" type="checkbox"/> Self-reporting volunteer hours	<input checked="" type="checkbox"/> Mapping to UN SDGs	<input checked="" type="checkbox"/> Thresholds	<input checked="" type="checkbox"/> Tax information		
<input checked="" type="checkbox"/> Log hours by proxy	<input type="checkbox"/> Workflows	<input checked="" type="checkbox"/> Processing & distribution	<input checked="" type="checkbox"/> Mapping to UN SDGs		
		<input checked="" type="checkbox"/> Vetting	<input checked="" type="checkbox"/> Workflows		

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-way	Two-way
Communications (External)	One-way	Two-way
Sharing (Internal)	Available	Unavailable
Sharing (External)	Available	Unavailable

USABILITY

Access	URL	Mobile friendly	SSO	Username & password	Customizable
Automation	Workflows	Notifications	Form auto-population		
Error Identification	Rules and alerts	Field completion	Format validation	Submission warnings and blocks	Native error support
Look & Feel	Logo	Colors	Layout	Social media tags	Localizations
Search	Keyword	Event/opportunity (date range, location, etc.)	Nonprofit/association		

ARCHITECTURE

Compatibility	Windows (browser)	OS (browser)	Linux (browser)	Android (browser)	iOS (browser)
Deployment	On-premise	Cloud (SaaS)	Single-tenant	Multi-tenant	Hybrid
Global – configuration	Single entity	Multi-site	Multi-country	Global	
Global – localization	Language or location specific characters		Text layout	Capitalization	Text sorting
	Pluralization	National conventions	Only currency is currently localized		
Global – languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek
	Hungarian	Italian	Japanese	Korean	Malay
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)
	Swedish	Thai	Turkish	Vietnamese	Other
	Partners typically handle the front end experience				
Integration	Out-of-the-box APIs	Custom integration			

PRIVACY & SECURITY

Admin levels	Super admin, partner admin, admin, end user, public user
GDPR	Compliant
Privacy – other	PCI/DSS

3 VENDOR SUPPORT

SUPPORT

Support centers	1
Support center locations	Boston, MA, USA
Server locations	Cloud – Amazon
Support levels	Client admin
Support languages	User
	External
	Arabic
	Chinese (simplified)
	Chinese (traditional)
	Czech
	Dutch
	English (UK)
	English (US/CAN)
	French (CAN)
	French (FRA)
	German
	Greek
	Hindi
	Hungarian
	Italian
	Japanese
	Korean
	Malay
	Polish
	Portuguese
	Romanian
	Russian
	Spanish (L/A)
	Spanish (MEX)
	Spanish (SPA)
	Swedish
	Thai
	Turkish
	Vietnamese
	Other
SLA	Priority-Based
	Single Option
	Business hours (1–2 hour response); off hours (4 hour response); response times vary between 1 and 8 business hours
Administrator service/ support methods	Phone (toll)
	Phone (toll free)
	Online (forum)
	Online (live chat)
	Online (ticket system)
	Online (email); Slack
Customer service/ support methods	Phone (toll)
	Phone (toll free)
	Online (forum)
	Online (live chat)
	Online (ticket system)
	Online (email)
Training methods	Online (synchronous)
	Online (self-paced)
	Online (forums)
	Classroom (onsite)
	Classroom (offsite)
	Third party
Value-add services	

IMPLEMENTATION

Implementation time	1–3 Months	4–6 Months	7–12 Months	12–18 Months	19–24 Months	24+ Months
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SMARTSIMPLE

The award-winning platform SmartSimple Cloud is used in 190+ countries, provides a unified database to integrate, aggregate, and analyze data across all philanthropic efforts. SmartSimple has embraced the United Nations Sustainable Development Goals and offers a version of the platform to clients incorporating these into their philanthropic programs. Employee engagement tools are offered via event storyboarding, badging and gamification features.

Platform strengths lie in the level of configurability, inbuilt reporting functionality, and ability to provision integrations into multiple external business systems. SmartSimple has unique reporting features, including the use of geolocation to visually present impact captured within the platform. Additionally, the platform can index attachments where a user can find documents using a simple word search. SmartSimple's Grant Management module provides flexibility, configurability, and features for grant tracking, messaging, and form annotation for grantee communication. Integration is offered to external reporting services to provide up-to-date grantee information and eligibility checks through the grantmaking cycle. For more information, please see www.smartsimple.com.

VENDOR NAME

SmartSimple Software Inc.

CLIENT BASE

400

HEADQUARTERS

Toronto, ON, CAN

ORG MARKET

Mid sized and large/enterprise

FOUNDED

2002

EMPLOYEES

100

R&D INVESTMENT

\$1.24M

FEES STRUCTURE

Implementation fee, annual subscription and support fee

DEEP DIVE 1 FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING		GRANTS	
● Proprietary volunteer opportunity database	● NPO validation	● Nonprofit database	● Fundraising pages	● Applicant database	● Grant disbursement
○ Active opportunities (proprietary)	● PTO tracking (individual)	● Nonprofit profile overview	● Funding status notifications	● Grant eligibility	● Volunteer grants
○ Active virtual opportunities (proprietary)	● PTO tracking (team)	● Nonprofit partner request	● Giving profile	● Forms	● Status notifications
● Real time database (proprietary)	● Dollars for Doers bank	● Nonprofit partner search	● Recognition & reward	● Metadata	● Email records
● Nonprofit access	● System Recommendations	○ Nonprofit access	● Check & EFT deposits	● Grant application templates	● Nonprofit access
● Volunteer opportunity database integration	● Competitions	● Company foundation	● Direct payment	● Collaboration	● Recognition & reward
● Volunteer opportunity & event search	● Volunteer communities	● In-kind donations	● Fees	● Grant evaluation	● Direct payment
● Nonprofit partner request	● Volunteer profile	● Gift cards	● Disbursement cadence	● Applicant vetting	● Checks & EFT deposits
● Volunteer event creation	● Recognition & reward	● Payroll deductions	● Payment options	● Applicant deduplication	● Dashboards
● Volunteer event types	● Hours logged	● International giving & matching	● Admin self-service	● Review and approval workflow	● Data & exports
● Volunteer event signup	● Post-event surveys	● Disaster relief (external)	● Dashboards	● Approval thresholds	● Real time reporting
● Native volunteering	● Dashboards	● Disaster relief (internal)	● Data & exports	● Grants agreement templates	● Workflows
● Work products	● Data & exports	● Automatic matches	● Future forecasting		
● Automatic time tracking	● Real time reporting	○ Match optimization	● Real time reporting		
● Self-reporting volunteer hours	● Mapping to UN SDGs	● Thresholds	● Tax information		
● Log hours by proxy	● Workflows	● Processing & distribution	● Mapping to UN SDGs		
		● Vetting	● Workflows		

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-way	Two-way	Includes: Configurable "notes" functionality, email notifications Email, email broadcasts, direct messages, pinboards, "email anything" communication capture iSharing via emails, notes, SMS, and in-system notifications		
Communications (External)	One-way	Two-way			
Sharing (Internal)	Available	Unavailable			
Sharing (External)	Available	Unavailable			

USABILITY

Access	URL	Mobile friendly	SSO	Username & password		
Automation	Workflows	Notifications	Form auto-population			
Error Identification	Rules and alerts	Field completion	Format validation	Submission warnings and blocks	Native error support	
Look & Feel	Logo	Colors	Layout	Social media tags	Localizations	White label
Search	Keyword	Event/opportunity	Nonprofit/association	Advanced search featured available and ability to save searches		

ARCHITECTURE

Compatibility	Windows (browser)	OS (browser)	Linux (browser)	Android (app)	iOS (app)	
Deployment	On-premise	Cloud (SaaS)	Single-tenant	Multi-tenant	Hybrid	
Global – configuration	Single entity	Multi-site	Multi-country	Global		
Global – localization	Language or location specific characters		Text layout	Capitalization	Text sorting	Punctuation
	Pluralization	National conventions	Only custom configuration supports translation			
Global – languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
Integration	Out-of-the-box APIs	Custom integration				

PRIVACY & SECURITY

Admin levels	Admin	Campaign coordinator	Volunteer coordinator	Grants management	Unlimited number of client defined roles with custom access and permissions
GDPR	Compliant	Noncompliant			
CPPA – Consumer Privacy Protection Act	Compliant	Noncompliant			
Privacy – other	CCPA, ISO 27001, SOC 2 Type II, SOC 1, G-Cloud, Cyber Essentials, NIST 800				

3 VENDOR SUPPORT

SUPPORT

Support centers	2					
Support center locations	Toronto, ON, CAN; Dublin, Ireland					
Server locations	Provided by AWS – located in OR (US) and VA (US)					
Support levels	Client admin	User	External			
Support languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
SLA	Priority-Based	Single Option	Tier 1 (24 hours); tier 2 (48 hours); tier 3 (4 days); tier 4 (as possible)			
Administrator service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Customer service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Training methods	Online (synchronous)	Online (self-paced)	Online (forums)	Classroom (onsite)	Classroom (offsite)	Third party
	One-on-one dedicated training also available					
Value-add services	Support360 – Support for your external community – in this case, SmartSimple supports your client foundations applicants, reviewers, and grantees. Premium Support – Including a named dedicated support representative, scheduled access to the Director of Customer Success, included ongoing configuration services and training.					

IMPLEMENTATION

Implementation time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
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WESPIRE

WeSpire is an employee engagement platform that uses gamification and behavioral science created with the intention of inspiring people to take sustainable action.

The platform aims to engage employees in habitual acts that drive personal and work-related outcomes both at work and home. Engagement modules cover sustainability, positive culture, Diversity, Equity & Inclusion (DE&I), social impact, giving, financial skills, personal well-being, and UN global goals. The platform provides administrators with reporting dashboards and a library of prebuilt campaigns and competitions across engagement categories, which can be used to present employees with individual and team-based campaigns or competitions. The employee experience hinges on a social mechanics feed, peer-to-peer communication channels, and gamification features that allow them to earn points for micro actions, compare outcomes with their colleagues, and provide feedback, rewards, and recognition. Various volunteering and giving programs are supported through similar curated events, giving activities and campaigns. Employees can contribute and vote on ideas related to volunteering and giving through an idea boards feature. WeSpire works with clients globally to achieve positive business, personal and social impact engagement programs, and provide analytics to link impact program participation to cultural outcomes. To ensure clients are getting the most out of their platform, WeSpire provides high-touch service through dedicated client success teams. The giving and grantmaking fund administration is powered by Givinga, a tech-enabled donor-advised fund. For more information, please see www.wespire.com.

VENDOR NAME

WeSpire

CLIENT BASE

35

HEADQUARTERS

Boston, MA, USA

ORG MARKET

Large/enterprise

FOUNDED

2012

EMPLOYEES

11-50

R&D INVESTMENT

\$4.5

FEES STRUCTURE

Annual fee based on number of modules and employee volume.

DEEP DIVE 1 FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING		GRANTS	
Proprietary volunteer opportunity database	NPO validation	Nonprofit database	Fundraising pages	Applicant database	Grant disbursement
Active opportunities (proprietary)	PTO Tracking (Individual)	Nonprofit profile overview	Funding status notifications	Grant eligibility	Volunteer grants
Active virtual opportunities (proprietary)	PTO tracking (team)	Nonprofit partner request	Giving profile	Forms	Status notifications
Real time database (proprietary)	Dollars for Doers bank	Nonprofit partner search	Recognition & reward	Metadata	Email records
Nonprofit access	System recommendations	Nonprofit access	Check & EFT deposits	Grant application templates	Nonprofit access
Volunteer opportunity database integration	Competitions	Company foundation	Direct payment	Collaboration	Recognition & reward
Volunteer opportunity & event search	Volunteer communities	In-kind donations	Fees	Grant evaluation	Direct payment
Nonprofit partner request	Volunteer profile	Gift cards	Disbursement cadence	Applicant vetting	Checks & EFT deposits
Volunteer event creation	Recognition & reward	Payroll deductions	Payment options	Applicant deduplication	Dashboards
Volunteer event types	Hours logged	International giving & matching	Admin self-service	Review & approval workflow	Data & exports
Volunteer event signup	Post-event surveys	Disaster relief (external)	Dashboards	Approval thresholds	Real time reporting
Native volunteering	Dashboards	Disaster relief (internal)	Data & exports	Grants agreement templates	Workflows
Work products	Data & exports	Automatic matches	Future forecasting		
Automatic time tracking	Real time reporting	Match optimization	Real time reporting		
Self-reporting volunteer hours	Mapping to UN SDGs	Thresholds	Tax information		
Log hours by proxy	Workflows	Processing & distribution	Mapping to UN SDGs		
		Vetting	Workflows		

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-way	Two-way
Communications (External)	One-way	Two-way
Sharing (Internal)	Available	Unavailable
Sharing (External)	Available	Unavailable

USABILITY

Access	URL	Mobile friendly	SSO	Username & password	Native iOS/Android
Automation	Workflows	Notifications	Form auto-population		
Error Identification	Rules and alerts	Field completion	Format validation	Submission warnings and blocks	Native error support
Look & Feel	Logo	Colors	Layout	Social media tags	Localizations
Search	Keyword	Event/opportunity	Nonprofit/association		

ARCHITECTURE

Compatibility	Windows (browser)	OS (browser)	Linux (browser)	Android (browser)	iOS (browser)	Native iOS/Android
Deployment	On-premise	Cloud (SaaS)	Multi-tenant	Hybrid		
Global – configuration	Single entity	Multi-site	Multi-country	Global		
Global – localization	Language or location specific characters		Text layout	Capitalization	Text sorting	Punctuation
	Pluralization	National conventions				
Global – languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
Integration	Out-of-the-box APIs	Custom integration	Social API (MS Teams, Yammer, Slack, etc.)			

PRIVACY & SECURITY

Admin levels	Event manager	Events only contributor	Channel contributor	Channel manager	Administrator
GDPR	Compliant	Noncompliant			
Privacy – other	User can mark themselves as private				

3 VENDOR SUPPORT

SUPPORT

Support centers	Unavailable					
Support center locations	USA					
Server locations	VA/CA, USA					
Support levels	Client admin	User	External			
Support languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
SLA	Priority-Based	Single Option	Business hours (1–2 hour response); off hours (4 hour response); 1 business day			
Administrator service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
	Zoom					
Customer service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
	Zoom					
Training methods	Online (synchronous)	Online (self-paced)	Online (forums)	Classroom (onsite)	Classroom (offsite)	Third party
Value-add services	A consulting service that works with customers prior to a technology implementation to design and develop an employee engagement strategy and solution design that aligns with their purpose and impact goals. During the consulting phase of the engagement, an assessment of a company's current state of Environmental, Social, and Governance (ESG) engagement against a proprietary, five-stage ESG Engagement Maturity Model [®] , benchmarks the customer's performance relative to top-quartile and other clients, establishes program specific goals and objectives as well as desired business and culture outcomes, and then develops a detailed program design and implementation plan, that includes, but is not limited to: recommendations, business requirements, conceptual and functional design, implementation plan, 2 year roadmap, cost estimates, dependencies, organization impact and governance structure.					

IMPLEMENTATION

Implementation time	1–3 Months	4–6 Months	7–12 Months	12–18 Months	19–24 Months	24+ Months
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YOURCAUSE + BLACKBAUD

YourCause + Blackbaud is one platform that includes CSRconnect, GrantsConnect, NPOconnect and Blackbaud Grantmaking. Through CSRconnect, the platform empowers employee volunteering and giving for the organizations they care about. CSRconnect has access to millions of vetted global nonprofits, provided to support employees' passions. A unique feature of CSRconnect includes the opportunity for employees to create virtual groups of any kind and show the volunteer projects they're participating in together.

Additionally, GrantsConnect includes an intuitive grant management software that enables grantmakers to allow management of the full lifecycle of a grant's program. NPOconnect enables nonprofit organizations to digitally connect to the YourCause® Global Good Network™, consisting of YourCause's hundreds of corporate partners and millions of their employees around the world. Blackbaud has a large charity database to connect companies and their employees to nonprofits around the world for opportunities to give and serve. The YourCause platform offers companies and their employees access to over 4 million vetted and verified nonprofits around the globe. The platform supports 172 currencies and payment methods that allow users to donate in their local currency while providing 26 language settings. For more information, please see solutions.yourcause.com.

VENDOR NAME

YourCause + Blackbaud

CLIENT BASE

Declined to disclose

HEADQUARTERS

Charleston, SC, USA

ORG MARKET

All markets

FOUNDED

1982/2008

EMPLOYEES

1001-5000

R&D INVESTMENT

Declined to disclose

FEES STRUCTURE

Subscription fees, payment distribution fees, and additional options.

DEEP DIVE 1 FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING		GRANTS	
● Proprietary volunteer opportunity database	● NPO validation	● Nonprofit database	● Fundraising pages	● Applicant database	● Grant disbursement
● Active opportunities (proprietary)	● PTO tracking (individual)	● Nonprofit profile overview	● Funding status notifications	○ Grant eligibility	● Volunteer grants
● Active virtual opportunities (proprietary)	● PTO Tracking (Team)	● Nonprofit partner request	● Giving profile	● Forms	● Status notifications
● Real time database (proprietary)	● Dollars for Doers bank	● Nonprofit partner search	● Recognition & reward	○ Metadata	● Email records
● Nonprofit access	● System recommendations	● Nonprofit access	● Check & EFT deposits	● Grant application templates	● Nonprofit access
● Volunteer opportunity database integration	● Competitions	● Company foundation	● Direct payment	● Collaboration	● Recognition & reward
● Volunteer opportunity & event search	● Volunteer communities	● In-kind donations	● Fees	● Grant evaluation	● Direct payment
● Nonprofit partner request	● Volunteer profile	● Gift cards	● Disbursement cadence	● Applicant vetting	● Checks and EFT deposits
● Volunteer event creation	● Recognition & reward	● Payroll deductions	● Payment options	● Applicant deduplication	● Dashboards
● Volunteer event types	● Hours logged	● International giving & matching	● Admin self-service	● Review & approval workflow	● Data & exports
● Volunteer event signup	● Post-event surveys	● Disaster relief (external)	● Dashboards	● Approval thresholds	● Real time reporting
🕒 Native volunteering	● Dashboards	● Disaster relief (internal)	● Data & exports	● Grants agreement templates	● Workflows
🕒 Work products	● Data & exports	● Automatic matches	● Future forecasting		
● Automatic time tracking	● Real time reporting	● Match optimization	● Real-time reporting		
● Self-reporting volunteer hours	● Mapping to UN SDGs	● Thresholds	● Tax information		
● Log hours by proxy	● Workflows	● Processing & distribution	● Mapping to UN SDGs		
		● Vetting	● Workflows		

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-way	Two-way	Includes: Direct messaging (user-user, admin-user), notifications *NPOconnect only Photos, stories, feedback, evaluation Social media sharing (Twitter, Facebook, LinkedIn)
Communications (External)	One-way	Two-way	
Sharing (Internal)	Available	Unavailable	
Sharing (External)	Available	Unavailable	

USABILITY

Access	URL	Mobile friendly	SSO	Username & password		
Automation	Workflows	Notifications	Form auto-population			
Error Identification	Rules and alerts	Field completion	Format validation	Submission warnings and blocks		Native error support
Look & Feel	Logo	Colors	Layout	Social media tags	Localizations	White label
Search	Keyword	Event/opportunity (Location, event type, skill, Interest, SDG, availability)		Nonprofit/association		

ARCHITECTURE

Compatibility	Windows (desktop app, browser)	OS (desktop app, browser)	Linux (desktop app, browser)	Android (app)	iOS (app)	
Deployment	On-premise	Cloud (SaaS)	Multi-tenant	Hybrid	Single tenant	
Global – configuration	Single entity	Multi-site	Multi-country	Global		
Global – localization	Language or location specific characters		Text layout	Capitalization	Text sorting	Punctuation
	Pluralization	National conventions	Custom configuration supports translation			
Global – languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)*
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay*	Polish
	Portuguese	Romanian*	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)*
	Swedish*	Thai	Turkish	Vietnamese	Other	
Integration	BBVA Compass, GiveIndia, Charities Trust, Global Giving, Canada Helps, Blackbaud Giving Fund, GlobalGiving, VolunteerMatch & Workday.					

PRIVACY & SECURITY

Admin levels	Owner	Admin	Editor	Viewer	Configurable by clients
GDPR	Compliant	Noncompliant			
Privacy – other	Health Insurance Portability and Accountability Act (HIPAA) compliant				

3 VENDOR SUPPORT

SUPPORT

Support centers	9					
Support center locations	TX, CA, FL, NY, SC, USA; AUS, UK, Costa Rica					
Server locations	Unavailable					
Support levels	Client admin	User	External			
Support languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other, over 50 languages compliant on chat support	
SLA	Priority-Based	Single Option	8 hour response time, 1 day resolution (business hours/day)			
Administrator service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
	Documentation					
Customer service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
	Documentation: Knowledgebase, Case Central (case portal)					
Training methods	Online (synchronous)	Online (self-paced)	Online (forums)	Classroom (onsite)	Classroom (offsite)	Third party
Value-add services						

IMPLEMENTATION

Implementation time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
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SOLUTION SPOTLIGHTS: VOLUNTEERING & GIVING

Read this section if you are looking for a technology solution that supports any combination one or both of corporate **volunteering** and **giving** programs, or if you are looking for more detail on one or more of the following **4 solutions**:

- + Communit eer
- + ESolidar
- + Golden
- + Vendredi



COMMUNITEER

Communiter, a formal partner of the United Nations, is a social enterprise using technology to connect, engage and mobilize volunteers to tackle the world's challenges. Communiter takes a holistic approach to volunteer engagement which is clearly articulated in their name – a hybrid of the words community and volunteer. The solution brings together volunteer management, project management and community management in one interface.

The newsfeed page for users is very similar to social media sites: content is created by multiple nonprofits on the platform and all causes are connected to the Sustainable Development Goals (SDGs). The solution provides a resource library for documents, enables private messaging between volunteers and offers crowdsourcing functionality. It facilitates "native" virtual volunteering whereby the entire volunteering experience can be done online without using other third-party software.

Communiter also partners with the solution Good2Give, to provide giving and grants functionality. Currently, 95% of their clients are Australian based.

VENDOR NAME

COMMUNITEER

CLIENT BASE

284

HEADQUARTERS

Sydney, AUS

ORG MARKET

Large

FOUNDED

2016

EMPLOYEES

13



































































R&D INVESTMENT

Declined to disclose

FEES STRUCTURE

Subscription

DEEP DIVE 1 FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING	
 Proprietary volunteer opportunity database	 NPO validation	 Nonprofit database	 Fundraising pages
 Active opportunities (proprietary)	 PTO tracking (individual)	 Nonprofit profile overview	 Funding status notifications
 Active virtual opportunities (proprietary)	 PTO tracking (team)	 Nonprofit partner request	 Giving profile
 Real time database (proprietary)	 Dollars for Doers bank	 Nonprofit partner search	 Recognition & reward
 Nonprofit access	 System recommendations	 Nonprofit access	 Check & EFT deposits
 Volunteer opportunity database integration	 Competitions	 Company foundation	 Direct payment
 Volunteer opportunity & event search	 Volunteer communities	 In-kind donations	 Fees
 Nonprofit partner request	 Volunteer profile	 Gift cards	 Disbursement cadence
 Volunteer event creation	 Recognition & reward	 Payroll deductions	 Payment options
 Volunteer event types	 Hours logged	 International giving & matching	 Admin self-service
 Volunteer event signup	 Post-event surveys	 Disaster relief (external)	 Dashboards
 Native volunteering	 Dashboards	 Disaster relief (internal)	 Data & exports
 Work products	 Data & exports	 Automatic matches	 Future forecasting
 Automatic time tracking	 Real time reporting	 Match optimization	 Real time reporting
 Self-reporting volunteer hours	 Mapping to UN SDGs	 Thresholds	 Tax information
 Log hours by proxy	 Workflows	 Processing & distribution	 Mapping to UN SDGs
		 Vetting	 Workflows

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-way	Two-way
Communications (External)	One-way	Two-way
Sharing (Internal)	Available	Unavailable
Sharing (External)	Available	Unavailable

USABILITY

Access	URL	Mobile friendly	SSO	Username & password		
Automation	Workflows	Notifications	Form auto-population			
Error Identification	Rules and alerts	Field completion	Format validation	Submission warnings and blocks		Native error support
	Manual detection and manual intervention					
Look & Feel	Logo	Colors	Layout	Social media tags	Localizations	White label
Search	Keyword	Event/opportunity (date range, location, etc.)		Nonprofit/association	SDGs	

ARCHITECTURE

Compatibility	Windows (browser)	OS (browser)	Linux (browser)	Android (browser)	iOS (browser)	
Deployment	On-premise	Cloud (SaaS)	Single tenant	Multi-tenant	Hybrid	
Global – configuration	Single entity	Multi-site	Multi-country	Global		
Global – localization	Language or location specific characters		Text layout	Capitalization	Text sorting	Punctuation
	Pluralization	National conventions				
Global – languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
Integration	Out-of-the-box APIs	Custom integration				

PRIVACY & SECURITY

Admin levels	Supporter, community admin, assigned admin, super user		
GDPR	Compliant	Noncompliant	
Privacy – other	Compliant	Noncompliant	

3 VENDOR SUPPORT

SUPPORT

Support centers	Online direct messaging with support staff, FAQs, training videos, complaints handling processes via email					
Support center locations	Sydney, AUS					
Server locations	Sydney and Singapore, Azure					
Support levels	Client admin	User	External: all users have same support			
Support languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
SLA	Priority-Based	Single Option	Business hours (1-2 hour response); off hours (4 hour response)			
Administrator service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Customer service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Training methods	Online (synchronous)	Online (self-paced)	Online (forums)	Classroom (onsite)	Classroom (offsite)	Third party
Value-add services						

IMPLEMENTATION

Implementation time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
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ESOLIDAR

Esolidar simplifies companies' social impact management, enabling corporate clients to plan, communicate, develop, and manage all CSR and ESG strategies. It is a way to bring social impact to your process.

Included in their services are charity auctions, match donations, community grants, social company feed, charitable gift cards, and more—like acceleration program management, volunteering management and impact analytics—that help clients engage their employees, impact the community, retain customers, and maximize impact.

Esolidar believes that companies who position themselves for long term sustainability and positive change go further. Esolidar brings a supportive community together in one place – the ones who need help and the ones who want to help. For more information, please see www.esolidar.com.

VENDOR NAME

Webankor SA (Esolidar)

CLIENT BASE

1018

HEADQUARTERS

Braga, Portugal

ORG MARKET

Large

FOUNDED

2013

EMPLOYEES

19

R&D INVESTMENT

\$400,000

FEES STRUCTURE

Based on employee volume and number of users.

DEEP DIVE 1 FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING	
Proprietary volunteer opportunity database	NPO validation	Nonprofit database	Fundraising pages
Active opportunities (proprietary)	PTO Tracking (individual)	Nonprofit profile overview	Funding status notifications
Active virtual opportunities (proprietary)	PTO tracking (team)	Nonprofit partner request	Giving profile
Real-time database (proprietary)	Dollars for Doers bank	Nonprofit partner search	Recognition & reward
Nonprofit access	System Recommendations	Nonprofit access	Check & EFT deposits
Volunteer opportunity database integration	Competitions	Company foundation	Direct payment
Volunteer opportunity & event search	Volunteer communities	In-kind donations	Fees
Nonprofit partner request	Volunteer profile	Gift cards	Disbursement cadence
Volunteer event creation	Recognition and reward	Payroll deductions	Payment options
Volunteer event types	Hours logged	International giving & matching	Admin self-service
Volunteer event sign up	Post-event surveys	Disaster relief (external)	Dashboards
Native volunteering	Dashboards	Disaster relief (internal)	Data & exports
Work products	Data & exports	Automatic matches	Future forecasting
Automatic time tracking	Real time reporting	Match optimization	Real time reporting
Self-reporting volunteer hours	Mapping to UN SDGs	Thresholds	Tax information
Log hours by proxy	Workflows	Processing & distribution	Mapping to UN SDGs
		Vetting	Workflows

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-way	Two-way
Communications (External)	One-way	Two-way
Sharing (Internal)	Available	Unavailable
Sharing (External)	Available	Unavailable

USABILITY

Access	URL	Mobile friendly	SSO	Username & password	
Automation	Workflows	Notifications	Form auto-population	Automatically adds, removes, updates users	
Error Identification	Rules and alerts	Field completion	Format validation	Submission warnings and blocks	Native error support
Look & Feel	Logo	Colors	Layout	Social media tags	Localizations
Search	Keyword	Event/opportunity (Date range, Location, etc.)		Nonprofit/association	

ARCHITECTURE

Compatibility	Windows (browser)	OS (browser)	Linux (browser)	Android (browser)	iOS (browser)	
Deployment	On-premise	Cloud (SaaS)	Single tenant	Multi-tenant	Hybrid	
Global – configuration	Single entity	Multi-site	Multi-country	Global		
Global – localization	Language or location specific characters		Text layout	Capitalization	Text sorting	Punctuation
	Pluralization	National conventions				
Global – languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
Integration	Out-of-the-box APIs	Custom integration				

PRIVACY & SECURITY

Admin levels	Admin	
GDPR	Compliant	Noncompliant
Privacy – other		

3 VENDOR SUPPORT

SUPPORT

Support centers	1					
Support center locations	Portugal					
Server locations	Ireland					
Support levels	Client admin	User	External			
Support languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
SLA	Priority-Based	Single Option	Business hours (1-2 hour response); off hours (4 hour response)			
Administrator service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Customer service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Training methods	Online (synchronous)	Online (self-paced)	Online (forums)	Classroom (onsite)	Classroom (offsite)	Third party
Value-add services						

IMPLEMENTATION

Implementation time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
	same day					

GOLDEN

Golden, an award-winning volunteer management solution, believes that participation in service is an extension of who you are, and their functionality was developed specifically for individuals. Golden provides their volunteer management functionality to multiple audiences including volunteer centers, nonprofits both large and small, governments, companies, foundations and academic institutions.

Golden currently operates in every continent but localizes on a country-by-country basis, to assure compliance with regulations, cultural norms, and other factors. Companies can use Golden technology directly or via integrations with a wide variety of other systems. Golden has premier distribution partnerships with Salesforce, Microsoft, Blackbaud, Kindful, Charity Navigator and Virtuous in addition to optional integrations with ADP, Workday, and other systems of record.

Golden's native iOS and Android app users can enjoy a gamification system called Karats wherein volunteers can win once-in-a-lifetime experiences that either Golden provides through their foundation or corporate partners can provide to employees. Another feature, "Deep Influence," is Golden's unique and proprietary technology that allows you to track the actual value of the volunteer time and donations you initiate when you share Golden Opportunities with others. This technology is free to use and works across all forms of engagement – virtual, local, skills-based, mentoring, peer-to-peer, board service, fundraising, and advocacy projects. For more information, please see www.goldenvolunteer.com.

VENDOR NAME

1 Inc. (Golden)

CLIENT BASE

9200

HEADQUARTERS

Los Angeles, CA, USA

ORG MARKET

All markets

FOUNDED

2015

EMPLOYEES

45

R&D INVESTMENT

Declined to disclose

FEES STRUCTURE

Freemium software-as-a-service, typically billed annually, but can be monthly, multi-year, or custom recurrence.

DEEP DIVE 1 FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING	
● Proprietary volunteer opportunity database	● NPO validation	● Nonprofit database	● Fundraising pages
● Active opportunities (proprietary)	● PTO tracking (individual)	● Nonprofit profile overview	● Funding status notifications
● Active virtual opportunities (proprietary)	● PTO tracking (team)	● Nonprofit partner request	● Giving profile
● Real time database (proprietary)	● Dollars for Doers bank	● Nonprofit partner search	● Recognition & reward
● Nonprofit access	● System recommendations	● Nonprofit access	● Check & EFT deposits
● Volunteer opportunity database integration	● Competitions	● Company foundation	● Direct payment
● Volunteer opportunity & event search	● Volunteer communities	● In-kind donations	● Fees
● Nonprofit partner request	● Volunteer profile	● Gift cards	● Disbursement cadence
● Volunteer event creation	● Recognition & reward	● Payroll deductions	● Payment options
● Volunteer event types	● Hours logged	● International giving & matching	● Admin self-service
● Volunteer event signup	● Post-event surveys	● Disaster relief (external)	● Dashboards
● Native volunteering	● Dashboards	● Disaster relief (internal)	● Data & exports
● Work products	● Data & exports	● Automatic matches	● Future forecasting
● Automatic time tracking	● Real time reporting	● Match optimization	● Real-time reporting
● Self-reporting volunteer hours	● Mapping to UN SDGs	● Thresholds	● Tax information
● Log hours by proxy	● Workflows	● Processing & distribution	● Mapping to UN SDGs
		● Vetting	● Workflows

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-way	Two-way	Includes:
Communications (External)	One-way	Two-way	Includes push notifications, SMS, email and third-party system integrations; chat and branded emails available for an additional cost
Sharing (Internal)	Available	Unavailable	Includes push notifications, SMS, email and third-party system integrations
Sharing (External)	Available	Unavailable	Including waivers, training materials, permissions and more Email, social media sharing

USABILITY

Access	URL	Mobile friendly	SSO	Username & password		
Automation	Workflows	Notifications	Form auto-population	Automatically tracks, shares, records, updates in real time		
Error Identification	Rules and alerts	Field completion	Format validation	Submission warnings and blocks	Native error support	
	Automatically deduplicates					
Look & Feel	Logo	Colors	Layout	Social media tags	Localizations	White label
	Also offers APIs for every data object and service supported in the system. The Karats rewards and recognition program can be customized to suit each client's audiences and community.					
Search	Keyword	Event/opportunity (Date range, location, etc.)		Nonprofit/association		

ARCHITECTURE

Compatibility	Windows (browser)	OS (browser)	Linux (browser)	Android (browser)	iOS (browser)	
Deployment	On-premise	Cloud (SaaS)	Single tenant	Multi-tenant	Hybrid	
Global – configuration	Single entity	Multi-site	Multi-country	Global		
	Also supports aggregators and super-aggregators who compile and curate activities across their organization and others (e.g. UNICEF Worldwide, Givewith, United Way Worldwide) – supporting both chapter hierarchies and partner relationships and hierarchies.					
Global – localization	Language or location specific characters		Text layout	Capitalization	Text sorting	Punctuation
	Pluralization	National conventions	Also includes cultural assimilation, legal compliance, usability testing, currencies, time zones, units of measurement, idioms and dialects, and more nuanced considerations.			
Global – languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
	Localization to countries not included takes 2 weeks					
Integration	Out-of-the-box APIs	Custom integration				

PRIVACY & SECURITY

Admin Levels	Owner, admin, writer, opportunity manager, reader, custom	
GDPR	Compliant	Noncompliant
Privacy – other	CCPA, COPPA, HIPAA, PDPA and most other privacy regulations.	

3 VENDOR SUPPORT

SUPPORT

Support centers	2					
Support center locations	USA, Philippines					
Server locations	North America, EU, APAC					
Support levels	Client admin	User	External			
Support languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other languages available over email and chat	
SLA	Priority-Based	Single Option	Business hours (1-2 hour response); off hours (4 hour response)			
Administrator service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email); by appointment
Customer service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email); by appointment
Training methods	Online (synchronous)	Online (self-paced)	Online (forums)	Classroom (onsite)	Classroom (offsite)	Third party
Value-add services	Partnerships with Salesforce, Microsoft, Blackbaud/YourCause, HandsOn Connect, VolunteerMatch, Kindful, Virtuous, Givinga, CHC, NationBuilder, Global Impact, Earthshare, WeHero, Fluxx, Carahsoft, Green Cross International, Double the Donation, Givewith, Charity Navigator, Giving Compass, United Way Worldwide, Fidelity, ADP, and more.					

IMPLEMENTATION

Implementation time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
	Typically one business day but can take up to a few weeks with data migration.					

VENDREDI

Vendredi brings social impact to the business world and provides access to unlimited positive actions for employees. They have the dream of empowering people in acting for good during their time at work. They have four main values: the power to act, sharing, radical ambition and enthusiasm in action. The platform makes it possible for you to keep all your altruistic actions in one place.

There are four sections within the navigation upon a user's login which include news, missions, challenges and donations. Within the volunteering module, there is a missions section of altruistic acts where employees can participate in social actions not directly related to NGOs. Vendredi also populates their site with volunteer projects in addition to the customized opportunities provided by corporate and nonprofit clients.

VENDOR NAME

Vendredi

CLIENT BASE

150

HEADQUARTERS

Paris, FR

ORG MARKET

Mid sized

FOUNDED

2014

EMPLOYEES

27



































































R&D INVESTMENT

Declined to disclose

FEES STRUCTURE

Annual platform subscription depending on employee volume.

DEEP DIVE 1 FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING	
 Proprietary volunteer opportunity database	 NPO validation	 Nonprofit database	 Fundraising pages
 Active opportunities (proprietary)	 PTO tracking (individual)	 Nonprofit profile overview	 Funding status notifications
 Active virtual opportunities (proprietary)	 PTO tracking (team)	 Nonprofit partner request	 Giving profile
 Real time database (proprietary)	 Dollars for Doers bank	 Nonprofit partner search	 Recognition & reward
 Nonprofit access	 System recommendations	 Nonprofit access	 Check & EFT deposits
 Volunteer opportunity database integration	 Competitions	 Company foundation	 Direct payment
 Volunteer opportunity & event search	 Volunteer communities	 In-kind donations	 Fees
 Nonprofit partner request	 Volunteer profile	 Gift cards	 Disbursement cadence
 Volunteer event creation	 Recognition & reward	 Payroll deductions	 Payment options
 Volunteer event types	 Hours logged	 International giving & matching	 Admin self-service
 Volunteer event sign up	 Post-event surveys	 Disaster relief (external)	 Dashboards
 Native volunteering	 Dashboards	 Disaster relief (internal)	 Data & exports
 Work products	 Data & exports	 Automatic matches	 Future forecasting
 Automatic time tracking	 Real time reporting	 Match optimization	 Real-time reporting
 Self-reporting volunteer hours	 Mapping to UN SDGs	 Thresholds	 Tax information
 Log hours by proxy	 Workflows	 Processing & distribution	 Mapping to UN SDGs
		 Vetting	 Workflows

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-way	Two-way
Communications (External)	One-way	Two-way
Sharing (Internal)	Available	Unavailable
Sharing (External)	Available	Unavailable

USABILITY

Access	URL	Mobile friendly	SSO	Username & password		
Automation	Workflows	Notifications	Form auto-population	Automatically adds, removes, updates users		
Error Identification	Rules and alerts	Field completion	Format validation	Submission warnings and blocks	Native error support	
Look & Feel	Logo	Colors	Layout	Social media tags	Localizations	White label
Search	Keyword	Event/opportunity (date range, location, etc.)		Nonprofit/association		

ARCHITECTURE

Compatibility	Windows (browser)	OS (browser)	Linux (browser)	Android (browser)	iOS (browser)	
Deployment	On-premise	Cloud (SaaS)	Single tenant	Multi-tenant	Hybrid	
Global – configuration	Single entity	Multi-site	Multi-country	Global		
Global – localization	Language or location specific characters		Text layout	Capitalization	Text sorting	Punctuation
	Pluralization	National conventions		Postal code everywhere		
Global – languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
Integration	Out-of-the-box APIs	Custom integration				

PRIVACY & SECURITY

Admin levels	Super admin, admin, user, action owner, ambassador, manager	
GDPR	Compliant	Noncompliant
Privacy – other	Compliant	Noncompliant

3 VENDOR SUPPORT

SUPPORT

Support centers	1					
Support center locations	Paris, FR					
Server locations	Ireland					
Support levels	Client admin	User	External			
Support languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
SLA	Priority-Based	Single Option	Business hours (1 to 2-hour response); off-hours (4-hour response); 48 hours maximum			
Administrator service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Customer service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Training methods	Online (synchronous)	Online (self-paced)	Online (forums)	Classroom (onsite)	Classroom (offsite)	Third party
Value-add services	Local nonprofits sourcing, ambassadorship program management, skills-based mission with nonprofits					

IMPLEMENTATION

Implementation time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
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SOLUTION SPOTLIGHTS: VOLUNTEERING

Read this section if you are looking for a technology solution that supports corporate **volunteering** programs, or if you are looking for more detail on:

+ DeedMob



DEEDMOB

Deedmob develops software to enable people to meaningfully contribute their time, skills, and resources in addressing the world's toughest challenges. Their engagement tool displays volunteering opportunities which can live on an organisation's website, a custom volunteering platform built with **DEEDMOB TOOLS**, or on Deedmob.com.

Deedmob's goal is to build a future where organisations can create their own volunteer movements with just a few clicks – a future in which people need simply to take their phones out of their pockets to start contributing to a better world, wherever they may be. Deedmob believes much more can be done to address societal problems, from climate change to homelessness, from the refugee crisis to child obesity. Its technology was used by multiple corporations and international governments in the COVID-19 pandemic to organise additional volunteering support. For more information, please see www.deedmob.com.

VENDOR NAME

Deedmob

CLIENT BASE

50 corporate / 8500 charities

HEADQUARTERS

Amsterdam

ORG MARKET

Large

FOUNDED

2017

EMPLOYEES

9

R&D INVESTMENT

\$1,000,000

FEES STRUCTURE

Subscription model of tiered pricing by employee volume; charities use complimentary.

DEEP DIVE 1 FEATURES & FUNCTIONALITY

VOLUNTEERING	
● Proprietary volunteer opportunity database	● NPO validation
● Active opportunities (proprietary)	◐ PTO tracking (individual)
● Active virtual opportunities (proprietary)	◐ PTO tracking (team)
● Real time database (proprietary)	○ Dollars for Doers bank
● Nonprofit access	● System recommendations
● Volunteer opportunity database integration	● Competitions
● Volunteer opportunity & event search	● Volunteer communities
● Nonprofit partner request	● Volunteer profile
● Volunteer event creation	● Recognition and reward
● Volunteer event types	● Hours logged
● Volunteer event signup	● Post-event surveys
● Native volunteering	● Dashboards
◐ Work products	● Data & exports
● Automatic time tracking	● Real time reporting
● Self-reporting volunteer hours	● Mapping to UN SDGs
● Log hours by proxy	○ Workflows

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-way	Two-way
Communications (External)	One-way	Two-way
Sharing (Internal)	Available	Unavailable
Sharing (External)	Available	Unavailable

USABILITY

Access	URL	Mobile friendly	SSO	Username & password	
Automation	Workflows	Notifications	Form auto-population	Automated activity review modules	
Error Identification	Rules and alerts	Field completion	Format validation	Submission warnings and blocks	Native error support
Look & Feel	Logo	Colors	Layout	Social media tags	Localizations
Search	Keyword	Event/opportunity (date Range, location, etc.)		Nonprofit/association	

ARCHITECTURE

Compatibility	Windows (browser)	OS (browser)	Linux (browser)	Android (browser)	iOS (browser)	
Deployment	On-premise	Cloud (SaaS)	Single tenant	Multi-tenant	Hybrid	
Global – configuration	Single entity	Multi-site	Multi-country	Global		
Global – localization	Language or location specific characters		Text layout	Capitalization	Text sorting	Punctuation
	Pluralization	National conventions	Custom languages added in 3 days			
Global – languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
Integration	Out-of-the-box APIs	Custom integration				

PRIVACY & SECURITY

Admin levels	Site admin, site moderator, organization admin, organization moderator, user/volunteer	
GDPR	Compliant	Noncompliant
Privacy – other		

3 VENDOR SUPPORT

SUPPORT

Support centers	1					
Support center locations	CET					
Server locations	Europe, UK, USA					
Support levels	Client admin	User	External			
Support languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
SLA	Priority-Based	Single Option	Business hours (1-2 hour response); off hours (4 hour response); 4 working hours CET			
Administrator service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Customer service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Training methods	Online (synchronous)	Online (self-paced)	Online (forums)	Classroom (onsite)	Classroom (offsite)	Third party
Value-add services	Bi-weekly advisory sessions					

IMPLEMENTATION

Implementation time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
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SOLUTION SPOTLIGHTS: GIVING & GRANTS

Read this section if you are looking for a technology solution that supports **giving** programs, or if you are looking for more detail on:

- + Pinkaloo
- + RaiseNow



PINKALOO

Pinkaloo, recently acquired by RenPSG, makes it easy for financial institutions, employers, and foundations to empower the giving of their customers, employees, and communities.

Employers use their white labeled portal to make it easy for employees to centrally manage all of their donations in one place. With collaborative drives and gamification opportunities built right into the portal, employers can incentivize their teams with referral, reward, and engagement programs.

The Giving Feed allows donors to share their donations with their peers. Peers can then easily give to the same organizations and users can publicly share their donations and invite others to join them, maximizing their impact. For more information, please see www.pinkaloo.com.

VENDOR NAME

Pinkaloo Technologies / RenPSG

CLIENT BASE

Declined to disclose

HEADQUARTERS

Indianapolis, IN, USA

ORG MARKET

Mid sized

FOUNDED

2016

EMPLOYEES

200

R&D INVESTMENT

\$1M+

FEES STRUCTURE

Implementation fee and monthly option based on employee volume.

DEEP DIVE 1 **FEATURES & FUNCTIONALITY**

GIVING	
● Nonprofit database	○ Fundraising pages
● Nonprofit profile overview	● Funding status notifications
○ Nonprofit partner request	● Giving profile
● Nonprofit partner search	○ Recognition & reward
○ Nonprofit access	● Check & EFT deposits
○ Company foundation	○ Direct payment
○ In-kind donations	● Fees
● Gift cards	○ Disbursement cadence
● Payroll deductions	● Payment options
○ International giving & matching	● Admin self-service
● Disaster relief (external)	○ Dashboards
○ Disaster relief (internal)	○ Data & exports
○ Automatic matches	○ Future forecasting
● Match optimization	● Real time reporting
○ Thresholds	● Tax information
● Processing & distribution	○ Mapping to UN SDGs
● Vetting	○ Workflows

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-way	Two-way
Communications (External)	One-way	Two-way
Sharing (Internal)	Available	Unavailable
Sharing (External)	Available	Unavailable

USABILITY

Access	URL	Mobile friendly	SSO	Username & password		
Automation	Workflows	Notifications	Form auto-population			
Error Identification	Rules and alerts	Field completion	Format validation	Submission warnings and blocks		Native error support
Look & Feel	Logo	Colors	Layout	Social media tags	Localizations	White label
Search	Keyword	Event/opportunity (date Range, Location, etc.)		Nonprofit/association		

ARCHITECTURE

Compatibility	Windows (browser)	OS (browser)	Linux (browser)	Android (browser)	iOS (browser)	
Deployment	On-premise	Cloud (SaaS)	Single tenant	Multi-tenant	Hybrid	
Global – configuration	Single entity	Multi-site	Multi-country	Global		
Global – localization	Language or location specific characters		Text layout	Capitalization	Text sorting	Punctuation
	Pluralization	National conventions				
Global – languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
Integration	Out-of-the-box APIs	Custom integration				

PRIVACY & SECURITY

Admin levels	Payroll admin	Customer admin
GDPR	Compliant	Noncompliant
Privacy – other	Compliant	Noncompliant

3 VENDOR SUPPORT

SUPPORT

Support centers	Unavailable					
Support center locations	USA					
Server locations	AWS East & West Coast USA					
Support levels	Client admin	User	External			
Support languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
SLA	Priority-Based	Single Option	Business hours (1-2 hour response); off hours (4 hour response); 1 business day			
Administrator service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Customer service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Training methods	Online (synchronous)	Online (self-paced)	Online (forums)	Classroom (onsite)	Classroom (offsite)	Third party
Value-add services	Bi-weekly advisory sessions					

IMPLEMENTATION

Implementation time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
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RAISENOW

RaiseNow is an all-in-one integrated fundraising platform for nonprofits. RaiseNow makes fundraising solutions supporters will love so nonprofits can focus on making a difference. RaiseNow wants a future where injustice is eliminated, and societal, environmental and economical challenges are addressed.

Individual supporters and international organizations alike benefit from their secure and user-friendly end-to-end fundraising platform. They advance partners' missions by helping to find supporters, rally communities and collect donations in a more efficient and successful way than before, bringing about long-lasting impact.

RaiseNow's values are hardwired into their mission and include playing fair, doing meaningful work, delighting customers, taking charge of personal growth, advocating for diversity and lifting one another up. They are very focused on partnerships and power multiple platforms' giving functionality and provide multiple integrations as well. For more information, please see www.raisenow.com.

VENDOR NAME

RaiseNow GmbH

CLIENT BASE

2700

HEADQUARTERS

Zurich, Switzerland

ORG MARKET

Mid sized

FOUNDED

2015

EMPLOYEES

50+

R&D INVESTMENT

\$1.4M

FEES STRUCTURE

Monthly fee and transaction fee (based on plan).

DEEP DIVE 1 **FEATURES & FUNCTIONALITY**

GIVING	
● Nonprofit database	● Fundraising pages
● Nonprofit profile overview	● Funding status notifications
○ Nonprofit partner request	○ Giving profile
○ Nonprofit partner search	● Recognition & reward
● Nonprofit access	● Check & EFT deposits
● Company foundation	○ Direct payment
○ In-kind donations	● Fees
● Gift cards	○ Disbursement cadence
● Payroll deductions	● Payment options
● International giving & matching	● Admin self-service
● Disaster relief (external)	● Dashboards
● Disaster relief (internal)	● Data & exports
● Automatic matches	○ Future forecasting
○ Match optimization	● Real time reporting
● Thresholds	● Tax information
● Processing & distribution	○ Mapping to UN SDGs
● Vetting	○ Workflows

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-way	Two-way
Communications (External)	One-way	Two-way
Sharing (Internal)	Available	Unavailable
Sharing (External)	Available	Unavailable

USABILITY

Access	URL	Mobile friendly	SSO	Username & password		
Automation	Workflows	Notifications	Form auto-population	Transactional emails are generated; marketing automation can be added through API.		
Error Identification	Rules and alerts	Field completion	Format validation	Submission warnings and blocks		Native error support
Look & Feel	Logo	Colors	Layout	Social media tags	Localizations	White label
Search	Keyword	Event/opportunity (date range, location, etc.)		Nonprofit/association		

ARCHITECTURE

Compatibility	Windows (browser)	OS (browser)	Linux (browser)	Android (browser)	iOS (browser)	
Deployment	On-premise	Cloud (SaaS)	Single tenant	Multi-tenant	Hybrid	
Global – configuration	Single entity	Multi-site	Multi-country	Global; Unavailable		
Global – localization	Language or location specific characters		Text layout	Capitalization	Text sorting	Punctuation
	Pluralization		National conventions			
Global – languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
Integration	Out-of-the-box APIs	Custom integration				

PRIVACY & SECURITY

Admin levels	Admin	
GDPR	Compliant	Noncompliant
Privacy – other	PCI level 2 certified	

3 VENDOR SUPPORT

SUPPORT

Support centers	3					
Support center locations	Germany	India	AUS			
Server locations	Zurich, Switzerland	London, UK				
Support levels	Client Admin	User	External			
Support languages	Arabic	Chinese (simplified)	Chinese (traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	French (CAN)	French (FRA)	German	Greek	Hindi
	Hungarian	Italian	Japanese	Korean	Malay	Polish
	Portuguese	Romanian	Russian	Spanish (L/A)	Spanish (MEX)	Spanish (SPA)
	Swedish	Thai	Turkish	Vietnamese	Other	
SLA	Priority-Based	Single Option	Business hours (1-2 hour response); off hours (4 hour response) : within 24 hours			
Administrator service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Customer service/ support methods	Phone (toll)	Phone (toll free)	Online (forum)	Online (live chat)	Online (ticket system)	Online (email)
Training methods	Online (synchronous)	Online (self-paced)	Online (forums)	Classroom (onsite)	Classroom (offsite)	Third party
Value-add services	Advisory services and development services					

IMPLEMENTATION

Implementation time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
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SECTION 04

WHAT TO EXPECT

KEY CONSIDERATIONS FOR THE
BUY-IN, PROCUREMENT, IMPLEMENTATION
AND ADOPTION OF VOLUNTEERING, GIVING
AND GRANTS TECHNOLOGIES

TECHNOLOGY

As described in section 1’s market analysis, the giving, volunteering, and grantmaking technology space is continuing to mature, and with its growth comes the expertise and availability of a wider array of practitioners.

Commonly, however, the solution many are currently using is often their first. In this section we look at overall sentiment towards giving, volunteering, and grantmaking technology, as well as the considerations around garnering buy-in, procurement selection, implementation, and driving adoption.

THE NET PROMOTER SCORE (NPS)

is a common way of evaluating customer loyalty by asking them to rate their likelihood to recommend a company, product, or service to a friend, family member, or colleague.

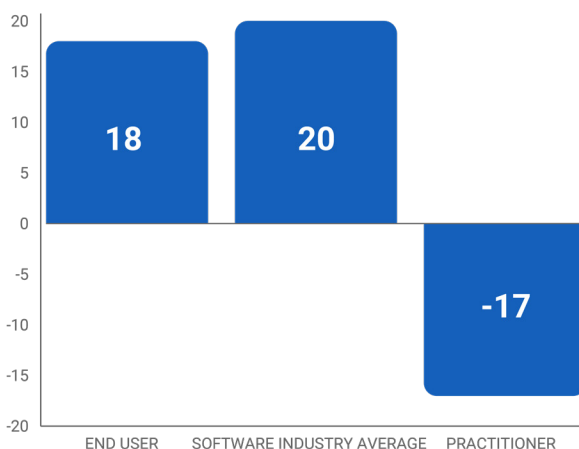
Respondents are grouped into

- + detractors (those scoring 1-6),
- + passives (7 or 8), and
- + promoters (9 or 10).

The NPS is the difference between promoters and detractor scores.

While the software industry average NPS sits in the +20 to +30 range, practitioner respondents in our review had a net promoter score of -17, while end-users were closer to the industry average at +18. The significant difference in practitioner and end-user sentiment may be attributed to how each group uses the same solution but from very different viewpoints; consider the starkly different perspectives a pilot, a passenger, and a mechanic may have while observing the same aircraft.

PRACTITIONER RESPONDENTS IN OUR REVIEW



While NPS does indeed measure the difference between promoters and detractors, it is important to note that a review focusing on technology – think product and restaurant reviews - may elicit stronger feelings from those dissatisfied with their solution than those with a more positive experience. Detractors were 33% more likely to consider switching platforms than their passive or promoter respondent counterparts.

Most practitioner respondents were passive (scoring 7-8) with an average score of 6.8. End-users were majority promoters with an average score of 8.

Switching platforms is rarely precipitated by a single issue. Often, it is a combination of factors that leads practitioners to consider finding a new solution.

Practitioners listed gaps in functionality, customer support, and vendor technical expertise/capability as primary motivators for this.

Surprisingly, cost and evolving program needs were not cited as reasons companies made the jump.

Switching platforms had a perceived effect on both satisfaction and utilization. In terms of effect on satisfaction, 63% of respondents saw satisfaction increase, while nearly 10% saw the opposite. In regards to utilization, 65% of respondents indicated an increase after switching platforms, while only 2% indicated it had not.

The launch of a new solution is often accompanied with securing buy-in, communication, and change management efforts that can explain much of the positive reception. In other words, simply switching a platform cannot explain the significant increase in utilization and satisfaction.

When looking at the lifecycle with a giving, volunteering, or grantmaking solution, those practitioners with solutions in "late life" (7+ years) were most likely to be detractors and least likely to be promoters. Those with new solutions in the first year are the most likely to be promoters.

Outside of those with a solution in the 7+ year range, the highest level of detractors is in the 1-3 year range, possibly suggesting growing pains as the solution is being mastered and practitioners familiarize with the strengths and limitations of their technology.

For practitioners, understanding the sentiment lifecycle can help prepare and set expectations for those involved in evaluation, selection, implementation, and in driving adoption/use post-implementation.

WHAT ACTIVITIES TO EXPECT:

- + Buy-in
- + Procurement
- + Implementation
- + Adoption

BUY-IN

Three quarters of respondents said it took them less than 6 months to secure leadership buy-in. Leader involvement largely factored in providing permission to proceed (~75%), approving budget or funding (~80%) but less so in terms of actively promoting the initiative through championship and ambassadorship (~30%).

PROCUREMENT

As in the previous review, practitioners who were involved in either selection, procurement, or implementation were much more likely to recommend the solution. Those involved directly in procurement were four times more likely to be promoters than those practitioners who were not. Meanwhile those involved in implementation were nearly double that, being approximately seven times more likely to be promoters. This would suggest that these platforms are more complex than as perceived by outsiders, and practitioners may benefit from their clients by getting that message through to management.

4X

Those involved directly in procurement were **four times more likely** to be promoters than those practitioners who were not.

7X

Those involved in implementation were approximately **seven times more likely** to be promoters than those who were not.

Beyond likelihood to recommend, 80% of respondents were either passive or detractors when it came to fit to needs. In those involved in procurement and/or implementation, scores were similar.

HOW MUCH SHOULD IT COST?

Most practitioners indicated strong familiarity with the costs of their platform with the average score of 8.5 (out of 10). As expected, practitioners involved in procurement were more likely to view costs as reasonable (~80%, indicating reasonable or extremely reasonable) and much less likely to view them as unreasonable or neutral (~20%) than those who were not involved in procurement (~60% and ~40%, respectively).

Despite the confidence in familiarity, a much smaller portion of practitioners were able to indicate ranges of costs for specific components of costs (technical implementation, planning and process reengineering, customization, etc.), but we recognize that there may be competitive or disclosure restrictions preventing respondents from providing concrete responses.

Overall, less than 10% of respondents felt that the cost of their

platform was unreasonable, suggesting that expenses are not the main criteria for selection or switching platforms. This notion is reinforced given the top three reasons for switching are functionality, customer service/support and a vendor's technical expertise.

10%

LESS THAN 10% OF RESPONDENTS FELT THAT THE COST OF THEIR PLATFORM WAS UNREASONABLE, THE TOP THREE REASONS FOR SWITCHING BEING FUNCTIONALITY, CUSTOMER SERVICE/SUPPORT AND A VENDOR'S TECHNICAL EXPERTISE.

In a procurement scenario where vendors benefit from a lack of pricing transparency, leaving practitioners at a disadvantage of information, understanding the way platforms are priced can help practitioners make better, more sustainable buying decisions. Only 30% of practitioner respondents in last year's review said they had performed Return-on-Investment (ROI) calculations or had gone through cost-benefit analysis when looking at shortlisted vendors.

Platform pricing can be divided into four types of costs:

- + **One-time** – these are setup costs for the implementation of the platform, standing up of localized instances, branding, data conversion (historical), single sign-on (SSO), training, and fixed-price customization initiatives.
- + **Recurring** – these are costs charged monthly, quarterly, or annually that include licensing fees per module or per user, maintenance and support (if not built into licensing).
- + **Variable or fees** – these are per transaction or per volume of transaction levies, and time and materials based customization
- + **Increases** – these are annual increases to the cost of licensing, usually for research and development

A fully modeled business case should include the aforementioned costs alongside the internal expenditure on resources, including those being brought in to manage the project, backfill for practitioner roles while they are engaged in the process, and the costs of familiarizing the platform to employees. Costs in the business case may be offset by the sunsetting or decommissioning of existing tools and realized process efficiencies. Internal costs allocated to a particular effort require complex calculations, but they are a critical consideration, especially if the alternative is engaging a third party vendor to assist.

HOW MANY SOLUTIONS TO REVIEW?

When looking at solutions, 80% of respondents reviewed 2-4 platforms, and ~10% sole sourced their solution having seen the one offering. Those who only looked at a single solution were much less likely to recommend (average score of 6.2 versus 7.5 for those who evaluated 2-4 vendors) but more data would be required to determine broader correlation.

WHO SHOULD BE INVOLVED?

To resource the selection and evaluation team, 85% of respondents pursued selection and evaluation internally with functional teams, IT, and procurement. Less than 10% of respondents used a third party to support evaluation, which is lower than procurement of other enterprise solutions.

WHAT OTHER SOURCES TO CONSULT?

When conducting due diligence, most practitioners spoke to industry professionals and peers (~90% primary research), participated in vendor demonstrations based on requirements (~90%), elicited detailed requirements (67%), and conducted searches online (~60% secondary research). Only 40% of respondents went through ROI or cost/benefit analysis for their solutions, further demonstrating that cost is not a leading factor in pursuing a solution.

HOW LONG SHOULD IT TAKE?

Procurement happened within 6 months for 80% of respondents. ~10% took a year or more.

IMPLEMENTATION

WHAT ACTIVITIES TO EXPECT?

Implementation can be separated into technical implementation and platform launch, socialization, and rollout. A typical technical implementation will involve the following activities:

1. Configuration
2. Integration
3. Data conversion
4. Customization
5. Testing
6. Practitioner training

CONFIGURATION

In the configuration stage, the vendor will set up the modules that have been procured, configuring organizations, users, and system roles based on customer requirements. Configuration may also include setting up functionality like single sign-on to allow users to log in automatically without having to memorize or input additional credentials.

If the deployment is global and there are localized instances for different countries, initial setup would also include those. Depending on the extent of branding, simple changes to the logo, colors, font, and imagery typically happen during configuration.

INTEGRATION

Workplace giving, volunteering, and grantmaking solutions will interface with HR solutions for employee information. This will provide them access to the system and hierarchical detail for workflow between employees and managers, as well as team information for activities like team based challenges or drives, and the detailed giving and volunteering views of the company.

In some organizations, employees will track time in other solutions (i.e., workforce management, time and attendance, or professional service automation), which will need to be interfaced as well. Likewise, some may want to connect to financial data or the general ledger for fee true-up, chargebacks, or other reporting.

In organizations with centralized reporting or data warehouses, interfacing may be needed to bring data out of platforms to combine it with datasets from other systems, or to include them in data models for dashboards or other visualizations.

Some of these interfaces will be bidirectional transactions – data coming into the platform, and data going back to source systems. In other cases, data will flow exclusively in one direction, as is usually the case with employee HR data.

The implication for practitioners is that every integration will require time, effort, and cost to configure and test. Some organizations may be familiar and comfortable with using Application Programming Interfaces (APIs), while others would have a preference or reliance on flat files. Depending on existing systems, resourcing and expertise, and even risk tolerance, effective integration can be one of the most complex stages of implementation.

Since the platform will need to communicate with other solutions including HR and financial tools, practitioners with the support of IT and the vendor may opt to interface these solutions to automatically transfer data. Practitioners should consider the implications of information and data created in the giving, volunteering, or grantmaking solution on other functions, such as reporting.

DATA CONVERSION

Particularly in the case of organizations that are switching from an existing platform, practitioners may want to bring forward historical data, migrate charities that have been previously vetted internationally, or preserve other information from their current solution.

Effort, cost, and complexity of conversion will depend on the level of detail, length of time, and granularity of data being converted to the new platform. For that reason, some organizations may choose a clean slate, archiving historical data in a reportable format but launching the new platform fresh.

For those practitioners who already have a platform and are considering the deployment of a new one, a decision will need to be made about history in the current solution. If years of data is being ported over, consider what history and how much. For data staying behind, consider what will be done with it. The volume and type of data being converted will have a material impact on timelines, costs, and effort required.

CUSTOMIZATION

Customizations may involve the embedding of platforms into intranets and company portals, front-end redesigns, changes to the user experience from the out-of-the-box version of the solution, and other ways to tailor it to the organization. Another common customization involved the localization of the platform to a particular country, where vendor localizations for language and appearance were not available.

One major caveat with a heavily customized solution is that every deviation from the standard will need to be carried into the future, documented, and then tested when vendor upgrades occur. Some may become onerous to maintain as business needs change, potentially creating orphaned data and otherwise compromising future scalability for short term fit. Some solutions offer no path to customization, instead encouraging customers to adopt best practices that may or may not fit their requirements or goals.

Vendors will need to balance accommodation of client needs, desires, and aspirations while also providing a common supportable framework for practitioners and end-users. Previously, vendors were generally willing to heavily customize a platform for its clients, but today's landscape sees them operating on 3-5 year roadmaps, offering minimal customization beyond branding, and instead opting to roll out in-demand functionality to the entire user base.

Customization may not be the optimal path forward for practitioners or vendors after all. Those practitioners who have gone beyond minimal customization were less satisfied with their platform's ability to meet program needs and less likely to recommend the vendor solution to others than those who have customized minimally or not at all.

TESTING

To ensure the appropriate functioning of the platform and its deployment in an organization, the vendor and the client will conduct separate testing. The vendor will ensure that any configuration or customization created is technically sound and producing no errors on their end, while practitioner users will conduct user acceptance testing, confirming that all functions operate as intended.

Testing will also extend to customization and interfaces already in use. Practitioners will need to imagine practical scenarios to see if the platform is able to meet their needs. Testing often reveals weaknesses where workflow or crucial steps have been overlooked, or where a process gap exists that requires intervention external to the system.

Practitioners should expect to participate in user acceptance testing or have their subject matter experts involved in the process.

PRACTITIONER TRAINING

To get acquainted with the system, practitioners received a variety of synchronous and asynchronous training through classroom instruction, 1:1 training, webinars, peer-to-peer, and through self-paced navigation of the platform or the study of media materials provided by the vendor.

Practitioners will typically have greater access to vendor resources than end-users, and should take advantage of available vendor user groups, forums, events, and conferences. Not only are many of these resources normally included in licensing fees, but they also unlock a network of experts that extend well beyond one organization.



HOW LONG SHOULD IT TAKE?

For ~70% of respondents, implementation took six months or less, and 95% completed implementation within a year.

HOW DIFFICULT IS IMPLEMENTATION?

When evaluating the difficulty of their implementation, 80% of respondents found it easy to moderate. This can likely be attributed to the low level of sophistication in solutions, strong implementation expertise from vendors, and/or internal capability and familiarity with similar implementations.

WHO SHOULD BE INVOLVED?

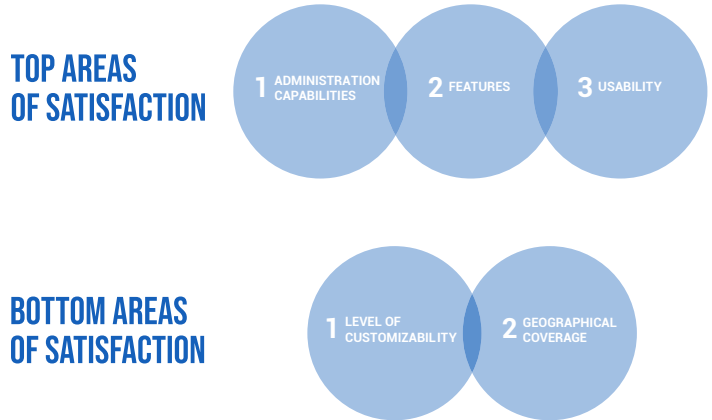
Most implementations were executed in partnership with IT (75%) or the vendor (80%), while 15% partnered with a third party or outsourced the implementation. 10% indicated going it alone (largely homegrown tool development and implementation). A typical implementation team comprised 2-10 employees representing business teams, IT, legal, HR, comms, and marketing.

HOW IMPORTANT IS A PLAN?

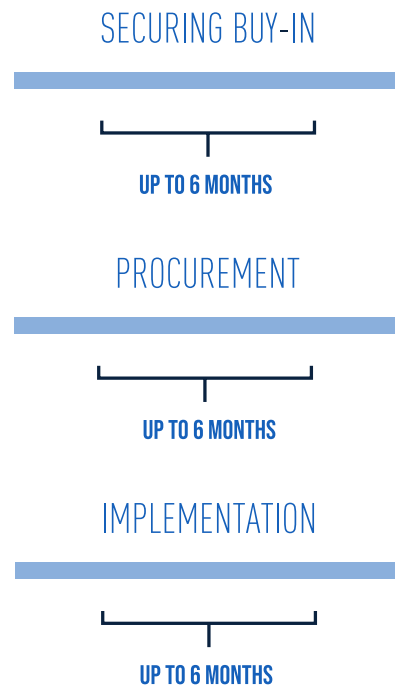
About 75% of implementations reflected the proposed plan, according to those asked.

Upon implementation, the top areas of satisfaction were administration capabilities, features and usability. Upon implementation, the lower areas of satisfaction were level of customization and geographical coverage. Nearly all respondents required customization and partnered with the solution vendor and, to a lesser extent, internal IT.

Based on these ranges, a realistic estimate for a typical technology



initiative in corporate citizenship involving giving, volunteering, and grantmaking technology should take about 18 months from securing buy-in to having a fully implemented solution. Of course, technology initiatives vary by organization and can be affected – among other reasons – by legislative or regulatory requirements, availability of resources, changes in leadership, funding, or organizational direction.



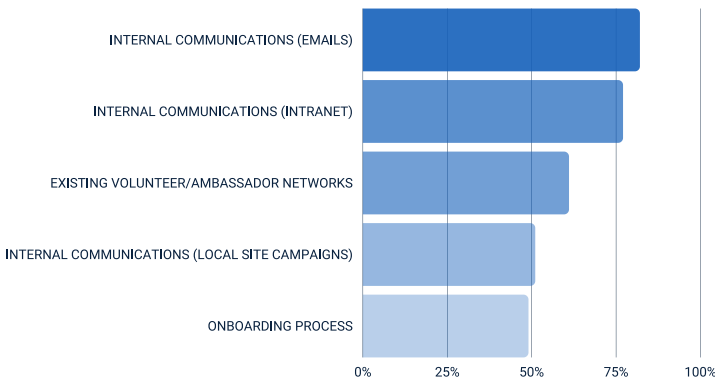
ADOPTION

Once implementation is complete, practitioners are then largely on their own to execute their organization's corporate citizenship programs. Implementation teams dissolve as work transitions to functional groups, and partners likewise transition the vendor relationship to account teams that will be mostly tasked with checking in, shepherding any new issues, and ensuring renewals happen as expected.

With a new solution in place, practitioners will look to promote new capability, train users, and engage leadership and employees to participate while encouraging others to do the same.

PROMOTIONAL STRATEGIES

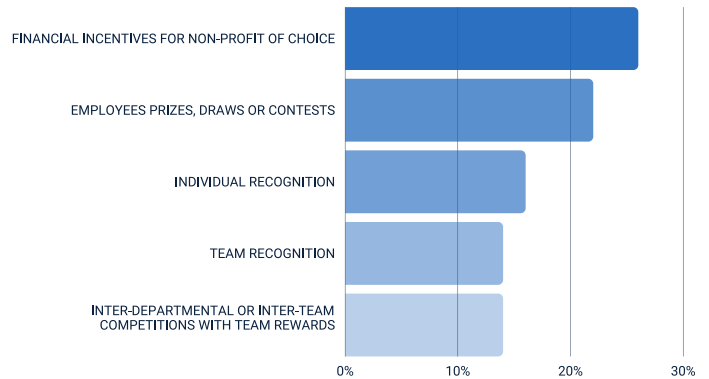
To drive adoption and promote their platform, the top promotional strategies organizations employed are as follows:



To determine the efficacy of these approaches, we asked end-users to rate the effectiveness of various promotional strategies, who indicated they were made aware of the new solution primarily via email communications, internal landing pages, and a combination of leadership and ambassador messaging. Word-of-mouth was an effective way to rally interest and support, with 70% of end-users stating that they told 6 or more colleagues about the platform.

To encourage employees to activate their accounts, most organizations did not offer any incentives. Those organizations who incentivized employees used a combination of motivational approaches, including these strategies:

THE TOP 5 STRATEGIES



TRAINING METHODS

Training for the new platform was multimodal provided through 1:1 training with the vendor (46%), self taught through webinars (38%) or other materials (22%), vendor solution webinars (33%), and peer training (24%) similar to the training provided to end-users, but supplementing vendor training with that provided by ambassadors and champions within the organization. End-users found FAQs, videos, and webinars the most effective methods for training.

- > 1:1 TRAINING WITH THE VENDOR
- > SELF-TAUGHT THROUGH WEBINARS
- > OTHER MATERIALS
- > VENDOR SOLUTION WEBINARS
- > PEER TRAINING

The undeniable challenge in training pertains not so much in getting those using the platform to understand how to use it, but in engaging them regarding its purpose and why it exists in the first place. Little training is focused on the importance of using the platform to manage giving and volunteering. Practitioners hoping that using a platform absent of intrinsic motivation, and disconnected from extrinsic motivators keeps end-users interested, may find their active employee base diminishing, with those left becoming increasingly apathetic.

Motivating employees and articulating purpose is a shared responsibility. Nonprofit organizations (NPOs) own the responsibility to convince employees of their cause’s worthiness. The organization provides the permission and time to engage, and the platform facilitates a frictionless and efficient transaction. Meanwhile practitioners combine these responsibilities as storytellers and advocates for corporate citizenship programs.

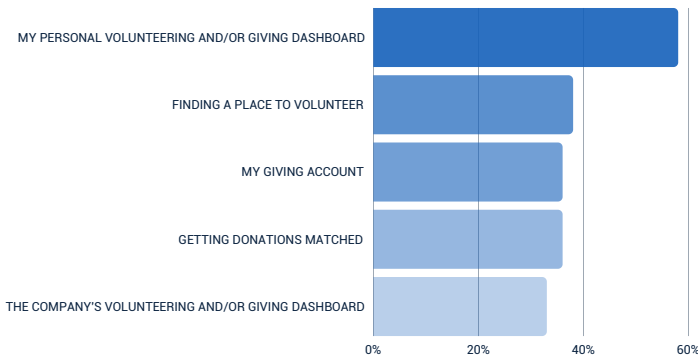
When discussing the greatest barrier to more impactful corporate citizenship, technology solution leaders interviewed for this report repeatedly cited the ‘why’ of giving and volunteering as one of the most significant issues for companies to address.

Training for giving, volunteering, and grantmaking technology have a strong emphasis on the mechanics of the technology, but could benefit from greater emphasis on the greater purpose and vision for its use.

MOST USED AND MOST IMPORTANT FUNCTIONALITY

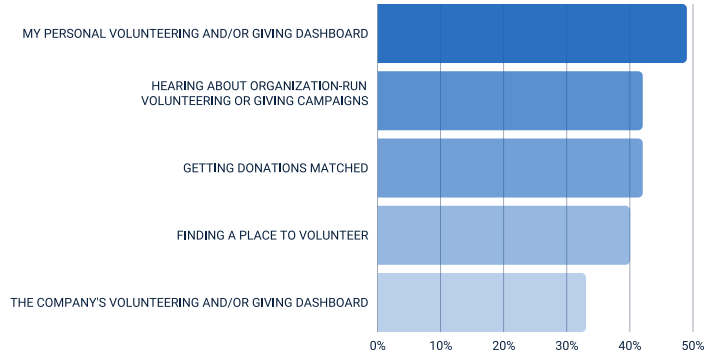
End-users used the following features most frequently:

MOST USED FEATURES



End-users found the following features most important within the platform:

MOST IMPORTANT FEATURES



Seeing what colleagues are doing consistently ranked at the bottom of the list of features both used and considered important.

EFFECT ON GIVING AND VOLUNTEERING

On the effects of using a solution for giving and volunteering, end-user responses consistently demonstrated that giving and volunteering was improved with the use of a platform, led to increased frequency in users giving and volunteering, and made the overall experience more enjoyable.

Nearly two-thirds of end-users found that giving and volunteering was made more enjoyable by the platform their organization is using. A third indicated it being about the same and a handful stated that it made it less enjoyable.

A similar proportion found that using the platform made giving and volunteering better. Nearly a third indicated it being “about the same,” and a handful stated they volunteered or gave more prior to using the platform.

SUPPORT

Most end-users may not need to reach out to support while interacting with the system, but a typical support model involves resources from the program team being able to answer most questions, self-service through documentation or FAQs, or escalation of questions to the vendor. Pragmatically, end-users were more interested in resolving their issue than with familiarizing themselves to various means of reaching support, or who was providing that support.

When interacting with the platform, the majority of functional and technical issues users encountered had to do with infrequency of use. For end-users, a call to action would be “just use it.”

End-users – unlike practitioners – receive the majority of support from practitioners or available documentation, but fundamentally will care more about their issues being resolved than by how or whom support is provided.

UNDERSTANDING ADOPTION

TO DRIVE ADOPTION

Understanding changes to giving and volunteering behavior from rollout to maturity of a platform is critical for practitioners looking to drive adoption.

TWO FACTORS MUST BE CONSIDERED:

1

First, employees who volunteer and give are on different stages of their journey. Some are new and inexperienced, while others got the hang of it years ago. How they approach the technology and what they hope to do with it are a useful set of indicators if you can account for where employees may be in their own understanding of volunteering and giving.

2

Second, activation and adoption will look different at launch than it will years into platform or program maturity. Metrics have to grow as a program and/or platform matures. Using the same set of metrics at launch and at five years post-implementation risks overlooking potential insight. While practitioners may be concerned only with the first-time activation of users upon platform rollout in year one, looking only at participation in years two or three and beyond is insufficient. Instead, practitioners should consider the significance of how the maturity of their volunteers, programs, and technology intersect to fully understand how the technology is performing for the organization.

As mentioned in section 1, most practitioners did not have great visibility with the level of engagement of employees. Defining what an engaged user looks like from a platform perspective can help not only measure engagement, but establish targets to strive towards.

IN OUR SURVEY, USERS WERE DEFINED AS:

- + **Engaged:** users performing three or more transactions per year within the platform. This includes logging volunteer hours, making donations, and similar activities, but excludes activities like agreeing to terms and conditions or creating a profile.
- + **Occasional:** users performing one or two transactions a year with similar parameters.
- + **Dormant:** users that have not performed any transactions, activated, or logged in to the platform.

Looking at each user group to understand attributes like geographic distribution, level within the organization, and type of work can help both identify barriers to engagement and allow practitioners to tailor messaging to specific audiences. Some users may be in the dormant category as a result of no perceived opportunities in their area or that align to their interests, and it's always possible individual performance goals are not leaving enough time for employees to volunteer.

With this insight in mind, practitioners can also look at workplace giving, volunteering, and grantmaking performance within these segments. Are engaged users giving more or just more frequently than occasional users? Do users move across groups or do they stay consistently engaged, occasional, or dormant? Does activating a dormant user once make them more active in the future? Do engaged users have engaged colleagues or is engagement evenly or randomly distributed across the organization? Is it better to activate a dormant user or engage an occasional user?

Questions like these are infinite, and while technology holds many of the answers, it remains the challenge of leaders and practitioners to make an impact by using them to the best of their potential.

APPENDIX: METHODOLOGY

RWI's **Corporate Volunteering, Giving and Grants Technology Review** presents a 360-degree view of volunteering, giving and grants technology market based on robust data collection and analysis processes.

RESEARCH METHOD

Research conducted for the report includes the following:

- + Secondary scan, surveys, and product demonstrations of solution providers
- + Interviews of select solution provider executives and industry thought leaders
- + Survey of industry practitioners
- + Survey of relevant platform end-users

The method by which vendors come to be featured in the report is as follows:

1. RWI analysts scan secondary sources and collect all known solution providers in the global market
2. Solution providers are invited to be featured in the report
3. Solution providers are selected for the Solution Spotlight
4. Base level surveys are distributed to featured solution providers
5. Deep dive surveys are pre-populated (i.e., completed by RWI analysts based on publicly available information) and distributed for verification and completion by Spotlight solution providers
6. Surveys are collected from all solution providers
7. Solution providers conduct product demonstration for RWI analyst team (Spotlight providers only)
8. Solution providers verify information intended for publication (Spotlight providers only)

SOLUTION SELECTION

All known solution providers in the market are invited to participate in the research at the base level of evaluation. Solution providers who are unresponsive to RWI's attempts to reach out and/or declined to participate are listed in the report as **Solutions Not Featured**.

Solution providers are invited to participate in the report as a Spotlight solution based on the following matrix:

- + Discretion of subject matter experts, informed by experience with RWI partners and practitioners and knowledge of industry-leading solution providers
- + Geolocation of solution providers, with the intention of providing a balanced global view of the market
- + Availability of volunteering, giving and/or grants features and functionality (representation of all-in-one, two-in-one or standalone platforms are proportionate to the market overall)

INFORMATION GATHERING

Information on solutions is gathered via several channels:

- + **Secondary research.** Once research participation is confirmed, analysts conduct secondary research of publicly available information about the solution as it relates to pre-established criteria for evaluation. Such information may include but is not limited to press releases, white papers, technical manuals, marketing collateral, and video feature demonstrations. Analysts pre-populate the survey to be distributed to solution providers with information found and provide the preliminary evaluation to solution providers for validation and completion.
- + **Survey results from solution providers.*** Solution providers are asked to validate and/or complete, where required, the pre-populated survey. The result is a self-reported evaluation by solution providers of their respective solutions.
- + **Product demonstrations by solution providers.** Analysts invite solution providers to conduct a product demonstration. The goal is to validate self-reported evaluations, round out analyst understanding, and gain direct exposure to platforms.

*All **Featured Solution** evaluations (except for those also included in Solution Spotlights) are self-reported by solution providers. No further steps are taken by analysts to build upon or verify the information provided, and thus RWI cannot claim that the information presented is complete or accurate. Readers are cautioned to exercise discretion in verifying information with solution providers in partnership discussions.

Secondary research, self-reported evaluations and product demonstrations form the basis of a solution's final evaluation. All information and evaluation decisions are recorded but not shared publicly with any client, third-party, or competing solution provider.

EVALUATION CRITERIA

All vendors are evaluated on three bases:

1. Features and functionality (volunteering, giving, grants)
2. Technology specifications (communications, usability, architecture, security)
3. Vendor support (service, training, implementation)

These three categories are represented in both the base level survey distributed to all participating vendors, and to a greater extent, in the deep dive survey distributed to all selected Spotlight solutions.

Refer to **Featured Solutions: Definitions** for a comprehensive list of criteria evaluated for all participating solution providers. Refer to **Solution Spotlights: Definitions** for a further expanded list of criteria evaluated for selected Spotlight solutions.

EVALUATION KEY

Once all information has been gathered, analysts assign final evaluations to each criterion for all solutions. The scales on which criteria is evaluated differs slightly between the **Featured Solutions** comparison and **Solution Spotlight** evaluations.

FEATURED SOLUTIONS

Features and functionality for volunteering, giving and grants are evaluated on a 5-point scale:

-  **Not available**
The solution provider does not offer this feature or functionality within the featured platform.

-  **Partially available**
The feature or functionality is not available in the platform but can be made partially or wholly available through customization.

-  **Basic functionality available**
The feature or functionality is available at a basic level relative to what is available in the market.** The capability is available out-of-the-box and/or with configuration only (i.e., no customization required).


-  **Advanced functionality available (customization)**
The feature or functionality is available at an advanced level relative to what is available in the market.** The capability is available at a basic level out-of-the-box and/or with configuration only and requires some customization to enhance.

-  **Advanced functionality available (configuration)**
The feature or functionality is available at an advanced level relative to what is available in the market.** The capability is available out-of-the-box and/or with configuration only (i.e. no customization required).

Criteria are evaluated based on how well the solution capability fulfills RWI's definition of the feature. Analysts maintain the right to adjust the definition of what a "partial," "basic" or "advanced" feature may look like based on subject matter expertise and experience during information gathering for all solutions.

*RWI analyst discretion.

Technology specifications and **vendor support** options are evaluated on a binary scale:

 **Not available**
The solution provider does not offer this capability/support option.

 **Available**
The solution provider offers this capability/support option.

The following indicate an **exception** to the evaluation keys:



On the roadmap

Feature or functionality is not currently available for purchase or implementation but is on the roadmap for development in the next 1-12 months.



Third-party integration

Feature or functionality is provided by the vendor through integration with a third-party provider. Speak to the solution provider for more information.

SOLUTION SPOTLIGHTS

The evaluation key for **features and functionality** is unchanged from that which appears in the **Featured Solution** comparison (see above).

Technology specifications and **vendor support options** are displayed qualitatively rather than on an evaluation scale. In most cases, the spectrum of available capabilities or options seen across all Spotlight solutions are presented, and available capabilities or options per solution provider are indicated visually. In some cases, additional notes are made to qualify the evaluation.

Exceptions are noted similarly to the method which appears in the **Featured Solution** comparison (see above).

FACT CHECKING & PUBLICATION

RWI takes the integrity of data, evaluation, and narrative within this publication very seriously. To ensure factual accuracy, all solution providers appearing in **Solution Spotlights** are given an opportunity to preview, comment, and submit change requests to the information intended for publication.

Once all information on a solution is assembled into a pre-publication version of a **Solution Spotlight** profile, the preview is sent to the solution provider team for verification. This preview includes:

- + Product name and category of evaluation (i.e. volunteering, giving & grants; volunteering & giving; volunteering; or giving & grants);
- + “The Basics” overview, including vendor name, headquarters location, year founded, number of employees (approximate or exact), client base size (approximate or exact), organization size market (small/medium, mid-sized, large/enterprise), R&D investment (2018 or average value), and fee structure;
- + “At-a-Glance” written review, comprising of RWI’s analyst narrative about the solution; and
- + “Deep Dive” evaluations, including all evaluations that will appear in the report on features and functionality, technology specifications and vendor support options.
- + RWI does not share information about other solutions or report components to solution providers prior to publication.

At minimum, RWI provides 5 business days for each solution provider to respond with written feedback.* If changes are requested, RWI assesses the request as follows:

- + **Recording error.** Relevant research records are consulted. If errors are corrected if present.
- + **Factual error.** If factual errors are present, RWI requests evidence to support evaluation adjustments. Evidence may include but is not limited to written explanation, screenshots, and recorded demonstrations. RWI and vendor teams engage in a dialogue to resolve evaluation discrepancies. If RWI analysts are satisfied with evidence, adjustments are made, and a revised version of the profile is presented.
- + **No response.** If a response is not received by the communicated deadline, RWI reserves the right to proceed with publication.

All research participants (including solution providers) are provided with an early release copy of the report as a form of gratitude for their time and effort in bringing this report to life.

*While solution providers may propose any desired change, including to written copy, RWI reserves editorial right to all profile contents. Change requests must be corroborated with written and/or visual evidence (i.e., screenshots, demonstration, etc.).

ENDNOTES

1. Indeed, in spite of the large supply of new COVID-19 era volunteers, there is initial evidence that a significant number of candidate-volunteers were not matched to individual beneficiaries or organizations (Hustinx & Gorleer, 2020; Meijs, 2020; Trautwein et al., 2020). In other words, a substantial reservoir of volunteer energy (Meijs) was not mobilized, not only failing to respond to the acute demand for volunteers, but also risking a negative effect on future willingness to volunteer. (The Impact of COVID-19 on volunteering in Europe, Faculty of Political and Social Sciences, 2021)
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