



CORPORATE VOLUNTEERING, GIVING AND GRANTS TECHNOLOGY REVIEW

A GLOBAL COMPARISON AND ANALYSIS

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FOREWORD

THE IMPERATIVE TO BE PERCEIVED AS A GOOD CORPORATE CITIZEN IS TAKING CENTER STAGE – SO MUCH SO THAT IT HAS BECOME A KEY ELEMENT OF BUSINESS STRATEGY. GRANTED, THE IDEA OF CORPORATIONS ACTING AS GOOD CITIZENS HAS BEEN AROUND FOR OVER 50 YEARS, GAINING WIDESPREAD ATTENTION AS A TOPIC IN THE 1960'S.

Yet developments in the economic, technological and geopolitical landscape of the past couple decades have significantly increased the scale and power of the private sector resulting in even greater emphasis on what it means for the private sector to act as a good citizen. By 2010, the [International Organization for Standardization \(ISO\)](#)¹, published ISO 26000: Guidance on Social Responsibility “to help organizations effectively assess and address social responsibility that are relevant and significant to their mission and vision; operations and processes; customers, employees, communities, and other stakeholders; and environmental impact.”

Today, non-financial performance has become an important, if not expected, piece of the corporate annual report. 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. As the influence of corporations grow, so do the expectations of both internal and external stakeholders. In recognition of this reality, 181 CEOs of leading U.S. companies and members of the preeminent business lobby, the Business Roundtable, issued an open letter titled “[Statement on the Purpose of a Corporation](#)”², which according to Alex Gorsky, CEO of Johnson & Johnson and Chair of the Business Roundtable Corporate Governance Committee, “affirms the essential role corporations can play in improving our society when CEOs are truly committed to meeting the needs of all stakeholders.”

EMPLOYEE GIVING AND VOLUNTEERING HAVE LONG SERVED AS A KEY MECHANISM TO ENGAGE EMPLOYEES, ON A VOLUNTARY BASIS, IN BROADER CSR STRATEGIC INITIATIVES. THE ROLE OF THESE PROGRAMS IS BECOMING EVEN MORE CENTRAL AS SUCCESSFUL STRATEGIES DEPEND ON THREE CRITICAL FACTORS:

A) IMPACT, B) AUTHENTICITY, AND C) AWARENESS.

Each of these factors, multifaceted on its own, is also interlaced with the other. Without meaningful and measurable impact, it becomes difficult to share stories and create awareness. The authenticity of the citizenship action, and impact, determines whether the awareness results in a positive or negative impression. And the resulting awareness, to a great degree, decides the level of investment in citizenship activities going forward.

As the theory and practice of corporate citizenship continues to expand and evolve, employee volunteering and giving provide companies with an effective strategy with which to address often negative or at best suspicious relationships that exists between business and society. This potential becomes even more profound given the backdrop of populist governments and divided societies.

While CEOs must voluntarily commit to meeting the needs of all stakeholders, employees must voluntarily choose to make that commitment a reality. The success of any corporate citizenship strategy, or program, depends on individual employees learning about the issues, taking action, building relationships, and doing the work that needs to be done. This human capital investment is key to unlocking other forms of capital required for impactful citizenship programs; financial, social, and intellectual.

Corporate volunteering and giving programs allow employees to mobilize their personal resources with support from their employer for broad social benefits. Employees not only leverage the assets of the business but combine these assets across wide social networks using trust and localized norms of cooperation.

The most global and encompassing realization of this reality is the private sector led partnership with the United Nations, IMPACT2030. As Peter Bodin, Chairman of the Board of Directors for IMPACT2030 and Global CEO of Grant Thornton notes,

“THE MISSION OF IMPACT2030 IS FOUNDED ON THE BELIEF THAT WHEN COMPANIES JOIN FORCES AND HARNESS THE SKILLS, EXPERTISE AND CREATIVITY OF THEIR PEOPLE AS A FORCE FOR GOOD, THEY CAN CHANGE THE WORLD.”³

Innovative technology is critical to the mobilizing, managing and measuring of effective human and financial capital investments. CSR programs can only get so far with an excel sheet.

This report includes as many technology solutions as we could find from all over the world supporting the human and financial investments of corporate citizenship programs. Given the growing importance of these investments to our future, our ambition in writing this report is to provide managers responsible for corporate community investments the ability to quickly identify solutions that align with their needs and program design.

We are confident this type of report will help reduce inefficiencies, inform the selection of right-sized solutions and potentially reduce high procurement costs.

We're proud to present this review in partnership with the Bill & Melinda Gates Foundation, whose commitment to impact, authenticity, and awareness is unparalleled. Together with the Foundation, we offer this information to benefit the field of Corporate Social Responsibility as we collectively work toward new levels of impact and innovation.

Respectfully,



CHRIS JARVIS,
EXECUTIVE DIRECTOR



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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.

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 the history of the market, recent developments, and prominent trends.

SECTION 2

Featured Solutions provides a high-level overview of 40 platforms on the basis of features and functionality, technology specifications, and vendor support.

SECTION 3

Spotlight Solutions expands upon the comparison of solutions in Section 3, and examines 17 of the 40 featured solutions at a level of detail never before seen in the industry.

SECTION 4

What to Expect presents key considerations for the procurement, implementation and adoption of a technology platform.

Having an informed understanding of the technology market is only the first step to determining which solution is right for your organization. The data in this report is collected from existing knowledge bases, solution providers, industry thought leaders, practitioners and real end-users. When using this report, please give due considerations to 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. RWI does not advise the selection of platform exclusively based on what this report contains. This report 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.

OUR APPROACH

THE CORPORATE VOLUNTEERING, GIVING AND GRANTS TECHNOLOGY REVIEW PROVIDES A 360-DEGREE VIEW OF THE TECHNOLOGY MARKET AND IS BASED IN EXTENSIVE RESEARCH EFFORTS WITH A GLOBAL REACH.



A MARKET SCAN RESULTED IN THE COLLECTION OF **51 KNOWN SOLUTION PROVIDERS**, RESPECTIVELY HEADQUARTERED ACROSS **13 COUNTRIES AND 5 CONTINENTS**



23 Solution providers completed a basic product survey



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

40

SOLUTION PROVIDERS AGREED TO PARTICIPATE IN OUR RESEARCH



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



60 PRACTITIONERS



ACROSS 56 COMPANIES



IN 7 COUNTRIES

Completed a survey about their experience with volunteering, giving and grants technologies



183 END-USERS



ACROSS 50 COMPANIES



IN 13 COUNTRIES

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

The proceeding findings are by no means comprehensively 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. This report is just the beginning.

The background features a complex network of white lines and dots of varying sizes, creating a sense of connectivity and data. The lines form various geometric shapes, including triangles and polygons, some of which are filled with a light orange color. The dots are scattered throughout, some acting as nodes in the network. The overall aesthetic is clean, modern, and tech-oriented.

SECTION 1

MARKET ANALYSIS

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

MARKET OVERVIEW

WHILE IT CAN BE CHALLENGING TO ACCURATELY ASSESS QUITE HOW MANY VOLUNTEERING, GIVING AND GRANTS TECHNOLOGY PLATFORMS CONSTITUTE A CROWDED MARKETPLACE, TO SAY THAT IT'S SATURATED WOULD BE AN OVERSTATEMENT.

Our survey looked at more than 50 of these platforms, with Blackbaud, Benevity, CyberGrants, and Causecast emerging as the most popular choices among practitioner and end-user respondents.

Solution providers emerging from adjacent industries are expected to add to the competition. Salesforce, for instance, has partnered with United Way, intending to combine its dominance in the Customer Relationship Management (CRM) space with United Way's renowned expertise in fundraising and workplace giving campaigns.

The rapid growth of Corporate Social Responsibility (CSR) over the past few decades continue to accelerate with CSR playing a critical role in the decision making in many of the world's largest companies. According to the [Governance & Accountability Institute](#)⁴, corporate sustainability reporting among Fortune 500 companies 'rose from just 20% of the companies reporting in 2011 to 81% in 2015'. At the same time, the [CECP's Giving in Numbers 2019 edition](#)⁵ notes that giving has been on the rise. In 2018, [median total giving was \\$20.7 million](#).⁶ Six out of ten companies that provided their contributions data in between 2016 and 2018 increased total giving by and median average of 11% during this period.

"IN AUSTRALIA, CSR PROGRAMS CONTINUE TO GROW IN SOPHISTICATION. POSITIVE CHANGE IN RECENT YEARS CAN BE ATTRIBUTED TO ADVANCEMENT IN TECHNOLOGY, THE CREATION OF UNIVERSITY DEGREES CENTRED ON SOCIAL IMPACT, A GROWING SOCIAL CONSCIOUS OF SENIOR CORPORATE STAKEHOLDERS, AND EMPLOYEES WHO EXPECT THEIR EMPLOYER TO SUPPORT COMMUNITIES IN NEED. EMPLOYEES ARE INCREASINGLY PREPARED TO BE VOCAL, AND EXPECT COMPANIES TO DO MORE"⁷

LISA GRINHAM, CEO, GOOD2GIVE

But how many companies are actually using platforms to support their programs? The Community Involvement Technology Vendor Report, produced by the Boston College Center for Corporate Citizenship, indicates the fourteen vendors surveyed in their

report served a total of over 4600 clients.⁸ But with almost 50,000 companies listed on the world's 47 stock exchanges, it is reasonable to suppose that less than 10% of these companies have yet to invest in this type of technology. The main two reasons being most companies have yet to formalize employee engagement in corporate citizenship. For most companies, employee giving and volunteering remains an ad hoc or philanthropic activity. Secondly, the majority of companies around the world still use spread sheets such as excel, if anything at all.

The major vendors have all grown through a combination of organic means, and inorganic growth through acquisitions and consolidations.

MARKET CONSOLIDATION AND COMMUNITIZATION OF FUNCTIONALITY

Consolidations in the industry have led to acquisitions of both software vendors as well as those specializing in services. This is consistent with practitioner needs for vendors who will be involved in aligning technology to programs rather than just platform providers. Consolidation of solution vendors acquiring or partnering with service providers is also compounded by the inverse: service providers acquiring solution vendors.

In the latter case, NPOs are recognizing that their program expertise can be a significant value-add to not only the deployment of technology, but to the very nature of the way it operates. [In a press release](#)⁹ following their acquisition of Causecast, America's Charities president and CEO, Jim Starr, explained part of the rationale for an NPO acquiring a technology vendor:

"We also understand the legwork that goes into implementing and sustaining an employee giving program, and the ability to shape the platform means we can better shape the experience employees and volunteers want and have come to expect from their employers."

Similarly, [in a press release](#) about Salesforce partnering with United Way to create Salesforce Philanthropy Cloud¹⁰, Salesforce.org CEO, Rob Acker, highlights the value of coupling technology with program expertise:

"Salesforce.org and United Way are working together to redefine philanthropy by making it easy for employees to not just donate, but to amplify, track and measure impact at an individual profile and collective level ..."

These messages stand in contrast with acquisitions of platform vendors by other platform vendors. When Blackbaud acquired YourCause¹¹, for instance, Kevin McDearis, Blackbaud's Chief Product Officer explains that the value of the acquisition is largely technical advantages:

"Combining YourCause's comprehensive solutions for maximizing global social impact with Blackbaud's unparalleled leadership in delivering cloud solutions for social good will enable companies around the world to create a culture that engages and inspires employees and customers, while driving business success and powering measurable outcomes."

If these market movements and the narratives that attempt to explain them are any indication, future platform providers and NPOs enabling their clients with workplace giving, volunteering, and grantmaking programs will look more alike than dissimilar, both as organizations and in their technology offering. The commoditization of functionality that will make the base offering across solutions similar is already pushing solution providers to explore innovative functionality to enable better giving and volunteering.

But until vendors settle into a stable form, client organizations and practitioners will have to bear the brunt of the disruption. In the open-ended responses to our survey, many practitioners mentioned acquisitions, consolidations, and their cascading effects as impacting their support model and overall experience with their platform.

For vendors, acquisition can lead to more robust product offerings and the ability to position themselves in the market as any client's "one-stop shop" for any potential need. Alternatively, existing clients are forced onto the sole supported platform and away from solutions acquired largely for their market share and clientele.

Unfortunately, as with other enterprise technologies, the complexity of technical integration and an existing subscriber base deployed on "legacy" products makes migration and conversion difficult. Few vendors want to undertake the gargantuan effort of architecting anew and redeveloping solutions for a common platform. A single vendor may instead offer multiple solutions acquired from different organizations over time, but present them as a unified platform, invariably leading to an inconsistent user experience for practitioners, end-users, and administrators.

The corporate giving and volunteer technology space is going through significant consolidation. Solution providers are acquiring service providers to bolster technology with program capability. Service providers and NPOs are acquiring solution vendors to add a practical toolset to their program offerings. And finally, solution providers are acquiring other solution providers to round out their portfolio of products

and cater to a broader client audience as a "one-stop shop" of all things CSR. Practitioners are being forced to operate in an environment of uncertainty, balancing operational needs with an ever-evolving vendor service model and technology landscape.

WORKPLACE VOLUNTEERING, GIVING OFTEN SEPARATE FROM GRANTMAKING

Currently, organizations are deploying multiple solutions depending on the need. Corporate giving and volunteering are more commonly found on the same platform. Here they are relied on by end-users and employees more so than for grantmaking, which is mostly occupied by practitioners representing a small subset of the employee population.

The choice of tools is not only indicative of functional deficiencies and lack of capability, but of the gap between how corporate citizenship and grants teams are organized within organizations. Often the two groups operate under separate teams and command vastly different budgetary and resourcing constraints. More so, their programs, champions, and target audiences vary as well.

Unless the goals and measures of success for both teams and their respective programs become shared, each team will pursue the technology and platform decisions that they see as best suited for their own success. The hopeful endnote would be that perhaps each team succeeding on their own can outweigh their joint success if their goals were to be convergent, and the potential economies that could be realized by joining forces.

This will not be driven by technology alone, but by the trend in corporate citizenship to be more encompassing of various expressions of what it means for a brand to act as a good citizen. For example, as CECP's André Solórzano, a Senior Manager of Data Insights writes in this year's Giving in Numbers report¹²:

"Over the last two decades, measuring and benchmarking social investment have become more integrated in corporate strategies and have employed more sophisticated tools and models to evaluate progress." As a result, CECP determined they would expand their research to include "a broader depth and breadth of corporate investments in society from across the company."

Today, many platforms cater to either giving and volunteering needs or grantmaking, reflecting a general understanding of the split between corporate citizenship and grants teams within organizations. As organizations continue to harmonize programs and evaluate their efficacy, and more holistically (or introspectively) assess what it means to be good citizen, it would be reasonable to expect a convergence of goals, tools, and measures of success.

MARKET TRENDS

TREND:

COMPRESSING TIME TO GO-LIVE AND THE CSR TECHNICAL ANALYST

Practitioners can spend 12-24 months on acquiring and implementing technology, taking away from other program related activities, in many cases halting all other strategies focused on growing the participation and impact of employee giving and volunteering. Securing buy-in and the procurement process can take as long as the implementation of the solution itself.

Part of the challenge is a technical one. CSR teams are not resourced with technical expertise and have to rely on internal IT resources or vendor technical consultants. Internal IT generally does not have the subject-matter expertise in CSR, as CSR does not generally have the technical background. Waiting for internal IT, delays with contracting, and implementation challenges are the top three reasons practitioners cited for extended implementation timelines. If a more effective solution is to be found, both platform vendors and organizations have a role to play.

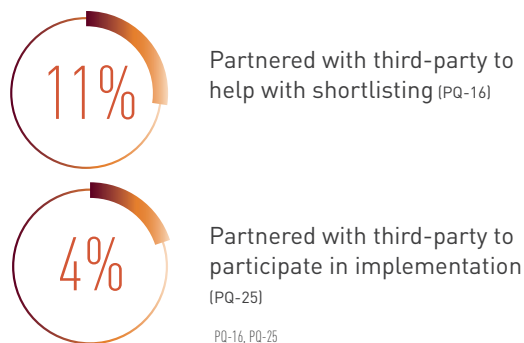
TOP 5 REASONS FOR DELAYS IN IMPLEMENTATION



SOURCE: PQ-22

Considering the nascent nature of giving, volunteering, and grantmaking platforms in organizations, technical experience selecting and implementing these tools combined with experience implementing the underlying programs will continue to be the rarest of combinations to find in a CSR professional. Vendors looking to implement at their own pace and capability (within months of contract completion) will need to navigate a highly technical implementation process using largely non-technical resources. Even though there are a number of small firms with the required technical expertise for both IT and citizenship/CSR, the practice of working with third parties remains rare and is usually dissuaded by internal teams.

ONLY 4% OF ORGANIZATIONS PARTNER WITH THIRD PARTIES FOR IMPLEMENTATION



As software and service companies converge to provide a unified and practice-informed implementation experience, implementation accelerators, templates, exemplars, and guides could go a long way towards compressing those timelines, particularly the ones reliant on overcommitted internal IT resources.

Organizations looking to bolster giving, volunteering, and/or grantmaking programs with technology will also have to re-examine the skillset required to be successful in CSR roles.

Whether in distinct jobs, as part of existing roles, or cross-trained, specially formed taskforces comprised of participants from across the business, CSR can look at the evolution of roles in other functions where technology is increasingly being deployed. Examples of this can be found in HR: Human Capital Management analysts, super-users in HR systems like Learning Management Solutions (LMS), Applicant Tracking Systems (ATS), and Workforce Management Systems (WFMS), alongside wellness solutions, engagement solutions, and similar tools. In marketing: Digital Marketing Specialists, super-users in marketing automation solutions, Customer Experience Management (CXM) tools, e-commerce suites, and Customer Relationship Management (CRM) solutions. They're also found in finance: Technical Financial Analysts, super-users in expense management solutions, invoice automation tools, procurement platforms, and Enterprise Resources Planning (ERP).

In order to ensure more predictable and expedient implementations, technical, analytical, and change management skills must be brought together in new and existing roles, or as part of cross-trained inter-disciplinary teams.

TREND:

NAVIGATING INFORMATION ASYMMETRY

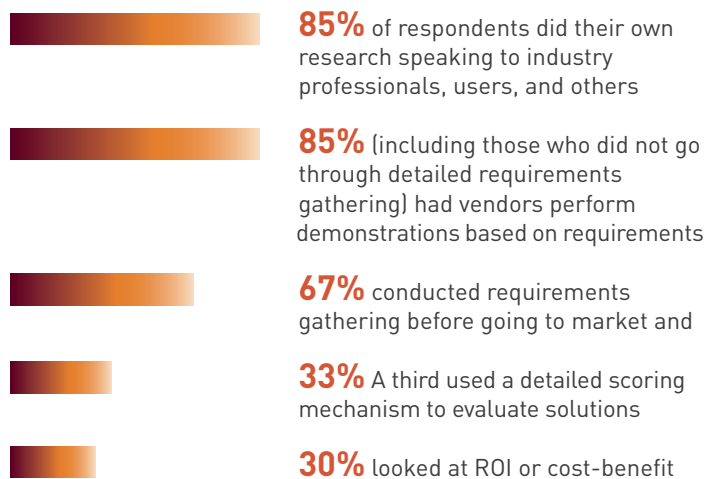
The workplace giving, volunteering, and grantmaking space combines software and services, which creates a complex environment of associated costs for practitioners to navigate.

In addition to service fees, there are one-time costs, recurring costs, and a variety of transactional variable costs. Vendors package and price their platforms differently, and practitioners are left to disambiguate that complexity, often without the resources to make an informed decision. Peers in different organizations may have varying programs, and therefore pricing plans and resource blends that are not easily comparable.

The lack of cost transparency puts practitioners at an information disadvantage. As more organizations adopt platforms, more buyer resources become available, a growing number of practitioners in the industry acquire the experience of buying and implementing solutions, the balance will shift towards increased information parity. Where asymmetries are smaller, costs will have to become more competitive, not only as practitioners become more informed, but also as new vendor entrants sacrifice margins to acquire market share.

In the meantime, few practitioners are putting together fully-costed business cases during procurement, and even fewer know the actual costs spent on implementation and training.

FEW PRACTITIONERS PURSUE FULLY-COSTED BUSINESS CASES, COST-BENEFIT WHEN PROCURING TOOLS



SOURCE: PQ-19

Information asymmetry between solution vendors and potential customers is putting practitioners at a disadvantage when procuring solutions. Practitioner experience and buyer resources will inevitably become more commonplace with time – leveling the imbalance – but in the meanwhile, practitioners must equip themselves with the right questions, be open to peers, and seek out information that best positions them for cost efficient program technology.

TREND: GIVING AND VOLUNTEERING IN AN INTERNATIONAL CONTEXT

Giving and volunteering platforms rely heavily on their "matching" functionality, helping employees to connect to either giving causes or match them to skills-based opportunities in their area. Available opportunities will vary from locale to locale, often leaving engaged and willing participants with a dearth of opportunities to choose from, if any at all.

"WE SEE MASSIVE CAPACITY ON THE PRIVATE SECTOR SIDE WITH THOUSANDS OF EMPLOYEES READY TO HELP AND DO WHAT'S NEEDED, BUT A DISCONNECT BETWEEN THAT CAPACITY AND ACCESS TO PERSONALLY RELEVANT OPPORTUNITIES TO GET INVOLVED. THIS INEFFICIENCY CAN ONLY BE ADDRESSED BY CREATING ONE EFFICIENT MARKETPLACE WHERE YOU CAN MATCH SPECIFIC EMPLOYEES WHO HAVE SPECIFIC SKILLS WITH SUITABLE OPPORTUNITIES AND NONPROFITS TO MAXIMIZE THOSE CAPABILITIES."¹³

BEN BLOCK, FOUNDER, GOZAROUND

A portion of the challenge can be attributed to the vetting and associated fees of international charities, which is an area that concerns practitioners and creates a gap in functionality with some platforms. The introduction of stringent and broad-sweeping legislation exacerbates the issue, as organizations and legal teams take on a risk position consistent with their company's culture. A good example of this is the introduction of The General Data Protection Regulation (GDPR), a data and privacy protection legislation that added a layer of complexity to international deployments of technology, particularly those housing personal identifiable information for employees.

Additional considerations regarding international capability are the maturity and focus of the market, varying attitudes towards giving and volunteering, and the types of programs that are common. For instance, Matching Gifts and Dollars for Doers programs are more popular in the US and Canadian markets, and platforms originating and targeting those markets tend to have stronger functionality to support them. Solutions targeting a different market may be able to support similar programs, but uptake is unclear.

General attitudes towards corporate citizenship and giving may also affect the efficacy of international programs and the adoption of the technology supporting them.

Designing an international program is difficult enough, but finding a platform with the "out-of-the-box" flexibility to support it in a localized fashion is even more challenging. Reducing programs to the lowest common denominator

risks losing the variety that employees and other end-users are seeking, and in turn, diluting both giving and volunteering numbers.

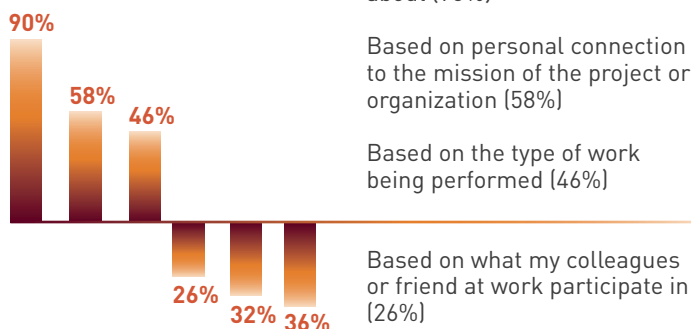
TREND: GRASSROOTS EMPLOYEE ACTIVISM AMPLIFIED THROUGH CORPORATE PROGRAMS

Whether organizations are deploying volunteering, giving, and/or grantmaking platforms to promote their own corporate-wide causes or are intended to encourage employees to give back, it is clear that employees are most enthusiastic about the causes that appeal to them on a personal level.

Positive responses about employee giving and volunteering largely point towards the program's focus being on close alignment to individual passions, interests, and skills, more so than causes broadly promoted by the organization (or even by peers). When asked how employees choose what causes to give or volunteer their time to, 90% said they did so based on a cause or organization they were interested in or aligned with their values. At the bottom of that list was what colleagues or friends at work were doing.

EMPLOYEES CHOOSE CAUSES BASED ON PERSONAL INTERESTS AND VALUES

TOP 3



BOTTOM 3

- Based on what my colleagues or friend at work participate in (26%)
- Based on the perceived legitimacy of the nonprofit or social enterprise (32%)
- Based on convenience (36%)

SOURCE: EU-08

Likewise, when asked about the functionality they use most often and was most important to them, their own profiles, giving, and time spent volunteering were what interested them and had them using it with increased frequency. Personal giving dashboards and the personal giving account were among the top capabilities respondents found most important and most frequently used.

“THANKS TO TECHNOLOGY, WE SEE A STRONG TREND TOWARDS THE USER-DRIVEN ENVIRONMENT PROVIDING EMPLOYEES WITH A CLEAR LOOK AT THE IMPACT OF THEIR VOLUNTEERING AND GIVING. IT IS CRITICAL TO ENABLE PEOPLE (AND THEIR ORGANIZATIONS) TO MAKE MORE INFORMED DECISIONS AS A RESULT OF CLEAR AND VERIFIED DATA BEING READILY ACCESSIBLE.”¹⁴

ROBERT WISE, FOUNDER AND MANAGING DIRECTOR, BECOLLECTIVE

European and Australian platforms already emphasize grassroots employee activism, recognizing that the platform should encourage matching, enable giving and volunteering, and allow for the effective tracking of time.

Combining technology that individualizes end-user experience with company programs that amplify their individual impact seems like a reasonable blend.

TREND: THE UNLIKELIHOOD OF PORTABILITY AND THE NON-EMPLOYEE

Portability refers to the ability of an end-user to “carry” their giving and volunteering account across organizations, essentially tying the account to an individual rather than a single organization’s program. A good example of portability is the retainment of any given phone number across multiple mobile carriers.

The appeal of portability is in preserving and visualizing a history of giving, volunteering, and ultimately, impact over time. Simultaneously, it is about avoiding having to start from scratch when moving to a new company and losing progress, at least by way of data.

Portability could be an effective way for non-employees to participate as well. Alumni of an organization, retired employees, contingent labor, or others outside the organization could give and volunteer their time and skills across companies and causes.

“IN AUSTRALIA, WE SEE CHARITIES WORKING WAY TOO HARD AND SPENDING WAY TOO MUCH MONEY TO HAVE COMPANIES SUCCESSFULLY IMPLEMENT A VOLUNTEER OR GIVING PROGRAM. FOR BENOJO, IT IS A PRIORITY TO HELP CHARITIES IMPLEMENT PROGRAMS AS EFFECTIVELY AND AS INEXPENSIVELY AS POSSIBLE.”¹⁵

MARTYN RYAN, FOUNDER, BENOJO

Unfortunately, for portability to be feasible, the industry would have to reimagine the way it prices and supports its end-users. These are both existentially challenging ideas; vendor platforms currently targeting business-to-business (B2B) would need to transform and also become business-to-consumer (B2C) providers with a corresponding price model. Today’s model, where organizations in most scenarios pay recurring per-user fees is in itself not a portable concept to a consumer experience, as it relies on economies where a single organization takes on the costs of many end-users, their numerous transactions (and associated fee true-ups), and provides a consistent and predictable stream of vendor revenue. A consumer application model simply will not be sustainable.

Similarly, the support model of a giving and volunteering platform is catered towards a few practitioners per organization, who in turn, support a much larger end-user base. A consumer model would require an exponential increase in support resources, catering to individual demands. Again, a challenging business proposition.

For the time being, until platform vendors add consumer business models to their B2B offerings or provide a solution to portability through some sort of self-financing open-framework for giving and volunteering, organizations looking to engage retired employees, company alum, and other non-employees would be forced to rely on only the current licensing options. In other industries, retiree licenses are offered at a discount, but many companies choose to limit services to current and active employees.

TREND:

EXPANDING SCOPE OF CORPORATE CITIZENSHIP

As previously noted, the current trend in corporate citizenship is a more inclusive approach to the concept of citizenship for companies, both internally and externally. In a [recent interview](#)¹⁶, Gwen Migita, global head of social impact, equity and sustainability at Caesars Entertainment notes:

"Typically, public policy, diversity, equity and inclusion, social impact and environmental sustainability are handled by distinct groups, whereas we believe finding connective threads among the areas is critical to enacting meaningful change."

Many companies are now merging these internal initiatives with external expressions of CSR. One of the most immediate priorities for technology is to support Employee Resource Groups (ERGs) alongside giving, volunteering, and grantmaking.

While there is significant overlap between these types of programs, the distinctive purpose of ERGs versus typical employee volunteering demands further innovation in available solutions. Bryan de Lottinville, Founder and CEO of Benevity sees this trend as evolving "beyond a straightforward community investment strategy to a much more holistic view of corporate citizenship."

This presents technology vendors with both an opportunity and a potential risk. A decade ago, it was difficult to find solutions that offered both employee volunteering and giving. Recently, larger vendors have begun to offer effective grant making solutions alongside these functionalities. As corporate citizenship programs enlarge the scope of their programs, there will be a growing demand for additional functionality at the same level of quality achieved in employee volunteering and giving. Practitioners may find themselves once again looking for multiple platforms to effectively service the growing scope of their programs while solution providers work to keep up with the new reality.



SECTION 2

FEATURED SOLUTIONS

A COMPARISON OF
40 TECHNOLOGY SOLUTIONS



FEATURED SOLUTIONS

OVERVIEW

40
SOLUTIONS

THIS SECTION OF THE REPORT CONTAINS A REVIEW OF **40 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 indicated in **bold** are explored in more depth in [Section 3: Solution Spotlights](#).

VOLUNTEERING, GIVING & GRANTS

- AIMS
- America's Charities All-in-One Giving Solution (Powered by Causecast)**
- Benevity**
- Benojo**
- CyberGrants**
- Fluxx**
- WeGive (Givinga)

- GivingTrax**
- GlobalGiving
- GozAround**
- HandsOnConnect
- Optimy
- SmartSimple**
- WeSpire**
- YourCause + Blackbaud

VOLUNTEERING & GIVING

- Alaya**
- Aplanet**
- BeCollective
- Catalyser
- Communteer
- eSolidar
- GetConnected (Galaxy Digital)

- Golden
- GoodCompany
- GoodUp**
- Porpoise
- Philanthropy Cloud (Salesforce)**
- StratusLIVE**
- YouGiveGoods

VOLUNTEERING

- Catchafire
- DeedMob
- MyCrowdCompany
- Snapgood

- V2V
- Volo Group
- YourMatch (VolunteerMatch)**

GIVING

- Evalato
- Good2Give**
- Pinkaloo
- RaiseNow

GRANTS






- Evalato
- Good2Give**

RWI DOES NOT ADVISE THE SELECTION OF PLATFORM EXCLUSIVELY BASED ON WHAT THIS REPORT CONTAINS. THIS REPORT 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 AND 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 delivered 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

Volunteer opportunity & 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.).
Basic event creation & management	Users and admins can create events associated with a volunteering opportunity (i.e. non-profit). Individuals or teams of employees can sign up for the event and receive event information and updates.
Disaster relief	Users and administrators can create volunteering opportunities related to disaster relief efforts within the community.
Nonprofit access	Nonprofits have access to an external-facing portal as a means to posting and managing volunteering events.
Hours administration	Admins can enter and/or validate volunteer hours on behalf of employees.
Dollars for Doers bank	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 employee to make donations from their rewards account to a nonprofit of choice.
Competitions	Competitions can be hosted between individuals or groups by department, site, or another employee attribute. Competitions are configured to have a timebound 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 activity of individuals and groups across the company.
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 but is not limited to volunteer hours to date, upcoming events, competition progress or results, nonprofits helped, or balance of rewards bank.
Real-time reporting	Data is available in real-time (i.e. no lag 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.

GIVING

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 access	Nonprofits have access to an external-facing portal as a means to post and managing giving opportunities and view relevant donor data.
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 relief (external)	Users and administrators can create giving opportunities related to disaster relief efforts within the community.
Automatic matches	Matches are triggered automatically, and in real-time, when donations qualify.
Payment options	Donors can use credit cards, PayPal, or other virtual payment types to make donations. All payment options are valid for one-time 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.
Real-time reporting	Data is available in real-time (i.e. no lag time).
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

Applicant database	Grant applicants are stored in a database. Admins can view applicants by various criteria (e.g. 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).
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.
Grant disbursement	Grant funds are automatically dispersed at a predetermined point in a grant approval workflow. Grants can also be disbursed manually.
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.
Nonprofit access	Nonprofits have access to an external-facing portal as a means to apply for and view the status of grants.
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 but is not limited to grant activity, company participation, grants disbursed to date, etc.
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.

TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	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).
Communications (External)	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).
Sharing (Internal)	Content within the system can be shared by users to other users.
Sharing (External)	Content within the system can be shared by users to external sites.

USABILITY

Look & Feel	System look and feel can be customized to client needs, including the logo, color scheme, layout, social media tags and localization elements (such as language). User experience may also be completely customized in a white label solution.
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ARCHITECTURE

Global	Ability for system to be configured based on complex company hierarchies (i.e. single entity, multi-site, multi-country, or for global operations).
Integration	Ability for system to be integrated with other systems via APIs or custom integration.

SECURITY

GDPR	Status of compliance with GDPR.
Permissions	Levels of access configurable based on role within the program and/or system (i.e. owner, admin, editor or viewer).

VENDOR SUPPORT

Support Levels	Availability of support to admins, users and external organizations (e.g. nonprofits).
Support Methods	Methods by which support can be accessed or solicited.
Training Methods	Methods by which training can be accessed or solicited.

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 **15 SOLUTIONS**:

- AIMS
- All-in-One Giving Solution
(America's Charities, Powered by Causecast)
- Benevity
- Benojo
- CyberGrants
- Fluxx
- WeGive (Givingal)
- GivingTrax
- GlobalGiving
- GozAround
- HandsOnConnect
- Optimy
- SmartSimple
- WeSpire
- YourCause + Blackbaud

	AUS	CAN			EUR		USA								
	BENOJO	BENEVITY	GOZAROUND	SMARTSIMPLE	AIMS	OPTIMY	ALL-IN-ONE-GIVING SOLUTION	CYBERGRANTS	FLUXX	WEGIVE (GIVINGA)	GIVINGTRAX	GLOBALGIVING	HANDSONCONNECT	WESPIRE*	YOURCAUSE + BLACKBAUD**
VOLUNTEERING															
VOLUNTEER OPPORTUNITY & EVENT SEARCH	●	●	●	●	●	●	●	●	○	◐	◐	◐	◐	◐	●
EVENT CREATION & MANAGEMENT	●	●	●	●	◐	●	●	●	◐	●	●	○	◐	◐	●
DISASTER RELIEF	●	●	◐	◐	◐	●	●	●	○	◐	●	○	◐	●	●
NONPROFIT ACCESS	●	●	●	◐	◐	●	◐	●	○	○	●	●	◐	◐	●
SELF-REPORTING	●	●	●	●	◐	●	●	●	◐	●	●	◐	◐	●	●
DOLLARS FOR DOERS BANK	○	●	◐	●	◐	○	●	●	○	●	●	○	◐	●	●
COMPETITIONS	◐	●	◐	◐	○	○	●	●	○	●	◐	◐	◐	●	●
VOLUNTEER COMMUNITIES	◐	●	◐	◐	○	○	●	●	○	●	◐	○	◐	●	●
POST-EVENT SURVEYS	◐	●	◐	●	○	●	◐	●	◐	◐	◐	◐	◐	●	●
DASHBOARDS	◐	●	◐	●	◐	●	●	●	◐	●	●	○	◐	●	●
REAL-TIME REPORTING	●	●	●	●	◐	●	●	●	◐	●	●	◐	◐	●	●
MAPPING TO UN SDGS	●	●	○	●	○	◐	◐	●	○	◐	◐	○	◐	●	●
GIVING															
NONPROFIT DATABASE	●	●	●	●	○	○	●	●	◐	●	●	●	◐	●	●
NONPROFIT ACCESS	●	●	●	◐	◐	○	●	●	◐	◐	●	●	◐	○	●
IN-KIND DONATIONS	●	●	●	●	○	○	●	●	◐	◐	●	○	◐	●	●
GIFT CARDS	○	●	○	◐	○	○	●	●	○	◐	○	●	○	●	●
PAYROLL DEDUCTIONS	●	●	○	●	○	○	●	◐	◐	●	◐	○	◐	◐	●
INTERNATIONAL GIVING & MATCHING	◐	●	◐	◐	○	○	◐	◐	◐	◐	◐	◐	○	●	●
DISASTER RELIEF	●	●	◐	◐	○	○	●	●	◐	●	●	●	◐	●	●
AUTOMATIC MATCHES	◐	●	●	◐	○	○	●	●	◐	●	◐	○	◐	●	●
PAYMENT OPTIONS	●	●	◐	●	○	○	●	●	○	●	◐	◐	◐	◐	●
DASHBOARDS	◐	●	●	●	○	○	●	●	◐	●	●	◐	◐	●	●
REAL-TIME REPORTING	●	●	◐	●	○	○	●	●	◐	●	●	◐	◐	●	●
MAPPING TO UN SDGS	●	●	○	●	○	○	◐	●	○	◐	◐	○	◐	●	●

* Giving and Grants functionality delivered through third-party integration with Givinga.

**YourCause + Blackbaud offers grant functionality via two products: GrantsConnect and Blackbaud Grantmaking. For more information, refer to the YourCause + Blackbaud Solution Spotlight.

	AUS	CAN			EUR		USA								
	BENOJO	BENEVITY	GOZAROUND	SMARTSIMPLE	AIMS	OPTIMY	ALL-IN-ONE-GIVING SOLUTION	CYBERGRANTS	FLUXX	WEGIVE (GIVINGA)	GIVINGTRAX	GLOBALGIVING	HANDSONCONNECT	WESPIRE*	YOURCAUSE + BLACKBAUD**
GRANTS															
APPLICANT DATABASE	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
GRANT ELIGIBILITY	○	●	●	●	●	●	○	●	●	●	●	●	●	●	●
GRANT EVALUATION	○	●	●	●	●	●	○	●	●	●	●	○	●	●	●
GRANT DISBURSEMENT	○	●	●	●	●	●	●	●	●	●	●	●	●	●	●
STATUS NOTIFICATIONS	●	●	○	●	●	●	○	●	●	●	●	●	●	●	●
NONPROFIT ACCESS	○	●	●	●	●	●	○	●	●	●	●	●	●	●	●
DASHBOARDS	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
REAL-TIME REPORTING	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
TECHNOLOGY SPECIFICATIONS															
INTERNAL COMMUNICATIONS	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓
EXTERNAL COMMUNICATIONS	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓
INTERNAL SHARING	✓	✓	✓	✓	✗	✗	✓	✓	✓	✓	✓	✗	✓	✓	✓
EXTERNAL SHARING	✓	✓	✓	✓	✗	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓
INTEGRATION	✓	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓
GLOBAL	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
ACCESS & PERMISSIONS	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
GDPR	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
VENDOR SUPPORT															
TECHNICAL SUPPORT (ADMIN)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
TECHNICAL SUPPORT (USERS)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
TRAINING (ADMIN)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
TRAINING (USERS)	✗	✓	✗	✓	✓	✓	✓	✗	✓	✓	✓	✓	✓	✗	✓

* Giving and Grants functionality delivered through third-party integration with Givinga.

**YourCause + Blackbaud offers grant functionality via two products: GrantsConnect and Blackbaud Grantmaking. For more information, refer to the YourCause + Blackbaud Solution Spotlight.

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 **14 SOLUTIONS**:

-
- Alaya
 - Aplanet
 - BeCollective
 - Catalyser
 - Communteer
 - eSolidar
 - GetConnected (Galaxy Digital)
 - Golden
 - GoodCompany
 - GoodUp
 - Porpoise
 - Philanthropy Cloud (Salesforce)
 - StratusLIVE
 - YouGiveGoods

	AUS/NZ				EUR				USA					CA
	BECOLLECTIVE	CATALYSER	COMMUNITEER*	GOODCOMPANY	ALAYA	APLANET	eSOLIDAR	GOODUP	GETCONNECTED	GOLDEN	YOUNGEGOODS	PHILANTHROPY CLOUD**	STATUSLIVE	PORPOISE
VOLUNTEERING														
VOLUNTEER OPPORTUNITY & EVENT SEARCH	●	●	●	●	◐	◐	◐	●	●	●	●	✓	●	●
EVENT CREATION & MANAGEMENT	●	●	◐	●	◐	●	◐	●	●	●	●	✓	●	●
DISASTER RELIEF	◐	●	◐	●	◐	◐	◐	●	●	●	●	?	●	●
NONPROFIT ACCESS	●	●	●	●	◐	●	◐	◐	●	●	●	?	●	●
SELF-REPORTING	●	●	◐	◐	◐	●	◐	◐	●	●	●	✓	●	●
DOLLARS FOR DOERS BANK	●	○	●	●	◐	◐	◐	○	◐	◐	◐	?	○	○
COMPETITIONS	◐	●	●	◐	◐	◐	○	○	◐	●	●	?	●	●
VOLUNTEER COMMUNITIES	◐	●	●	●	◐	◐	◐	○	●	●	●	?	○	●
POST-EVENT SURVEYS	◐	◐	◐	●	◐	◐	◐	○	●	●	○	?	◐	●
DASHBOARDS	●	●	◐	●	◐	●	◐	●	●	●	○	✓	◐	●
REAL-TIME REPORTING	●	●	◐	●	◐	●	◐	●	●	●	◐	✓	●	●
MAPPING TO UN SDGS	○	●	●	○	◐	●	◐	●	◐	●	○	✓	○	●
GIVING														
NONPROFIT DATABASE	◐	●	●	●	◐	●	◐	○	◐	●	●	✓	●	○
NONPROFIT ACCESS	○	●	●	●	◐	●	◐	◐	○	◐	●	?	○	○
IN-KIND DONATIONS	○	●	○	○	◐	◐	◐	◐	○	●	●	?	○	●
GIFT CARDS	○	○	○	●	○	○	●	○	○	◐	○	?	○	○
PAYROLL DEDUCTIONS	○	●	●	●	◐	○	○	○	○	◐	◐	✓	●	○
INTERNATIONAL GIVING & MATCHING	○	●	○	●	◐	◐	◐	◐	○	◐	◐	?	○	○
DISASTER RELIEF	◐	●	●	●	◐	◐	◐	●	◐	◐	◐	✓	●	○
AUTOMATIC MATCHES	○	○	●	●	○	○	◐	◐	○	◐	◐	?	●	○
PAYMENT OPTIONS	◐	●	●	●	◐	◐	◐	◐	◐	◐	●	✓	●	○
DASHBOARDS	◐	●	●	●	◐	○	◐	●	○	◐	●	✓	◐	●
REAL-TIME REPORTING	●	●	●	●	◐	○	◐	●	●	◐	●	✓	●	●
MAPPING TO UN SDGS	○	●	○	○	◐	◐	◐	◐	○	◐	◐	✓	○	●

*Giving functionality delivered through third-party integration with Good2Give.

**For an explanation of the evaluation key used to compare the Philanthropy Cloud platform, refer to the Philanthropy Cloud Spotlight profile.

	AUS/NZ				EUR				USA					CA
	BECOLLECTIVE	CATALYSER	COMMUNITEER	GOODCOMPANY	ALAYA	APLANET	eSOLIDAR	GOODUP	GETCONNECTED	GOLDEN	YOU GIVE GOODS	PHILANTHROPY CLOUD*	STATUSLIVE	PORPOISE
TECHNOLOGY SPECIFICATIONS														
INTERNAL COMMUNICATIONS	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	?	✓	✓
EXTERNAL COMMUNICATIONS	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓	?	✓	✓
INTERNAL SHARING	✓	✓	✓	✓	✗	✗	✓	✓	✓	✓	✓	✓	✗	✓
EXTERNAL SHARING	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	?	✗	✓
INTEGRATION	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓	✓	✓	✓	✓
GLOBAL	✓	✗	✓	✗	✓	✓	✗	✓	✓	✓	✓	?	✓	✓
ACCESS & PERMISSIONS	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓
GDPR	✓	✓	✓	✗	✓	✓	✓	✓	✓	✓	✗	?	✗	✓
VENDOR SUPPORT														
TECHNICAL SUPPORT (ADMIN)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
TECHNICAL SUPPORT (USERS)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	?	✓	✓
TRAINING (ADMIN)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	?	✓	✓
TRAINING (USERS)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	?	✓	✓

*For an explanation of the evaluation key used to compare the Philanthropy Cloud platform, refer to the [Philanthropy Cloud Spotlight](#) profile.

FEATURED SOLUTIONS

VOLUNTEERING

VIEW THIS COMPARISON IF YOU ARE LOOKING FOR A TECHNOLOGY SOLUTION THAT SUPPORTS CORPORATE **VOLUNTEERING** PROGRAMS. THIS SECTION LOOKS AT **7 SOLUTIONS**:

-
- Catchafire
 - DeedMob
 - MyCrowdCompany
 - Snapgood
 - V2V
 - Volo Group
 - YourMatch (VolunteerMatch)

	EUR		UK	USA			SA
	DEEDMOB	MYGROWDCOMPANY	VOLO GROUP	CATCHAFIRE	SNAPGOOD	YOURMATCH	V2V
VOLUNTEERING							
VOLUNTEER OPPORTUNITY & EVENT SEARCH	●	●	●	◐	●	●	◐
EVENT CREATION & MANAGEMENT	●	●	●	◐	●	●	●
DISASTER RELIEF	●	●	●	○	●	●	●
NONPROFIT ACCESS	●	●	●	○	●	●	●
SELF-REPORTING	●	○	●	○	●	●	●
DOLLARS FOR DOERS BANK	○	○	◐	◐	◐	●	◐
COMPETITIONS	●	◐	◐	◐	◐	○	◐
VOLUNTEER COMMUNITIES	●	◐	◐	○	●	●	●
POST-EVENT SURVEYS	●	●	●	◐	◐	●	◐
DASHBOARDS	●	●	●	◐	◐	●	◐
REAL-TIME REPORTING	●	●	●	◐	◐	●	●
MAPPING TO UN SDGS	◐	◐	●	◐	◐	◐	●
TECHNOLOGY SPECIFICATIONS							
INTERNAL COMMUNICATIONS	✓	✓	✓	✗	✓	✓	✓
EXTERNAL COMMUNICATIONS	✓	✓	✓	✗	✗	✓	✓
INTERNAL SHARING	✓	✓	✓	✓	✗	✓	✓
EXTERNAL SHARING	✓	✓	✓	✓	✓	✓	✓
INTEGRATION	✓	✓	✓	✓	✗	✓	✓
GLOBAL	✓	✓	✓	✗	✗	✓	✓
ACCESS & PERMISSIONS	✓	✗	✓	✗	✗	✓	✓
GDPR	✓	✓	✓	✓	✗	✗	✓
VENDOR SUPPORT							
TECHNICAL SUPPORT (ADMIN)	✓	✓	✓	✓	✓	✓	✓
TECHNICAL SUPPORT (USERS)	✓	✗	✓	✓	✗	✓	✓
TRAINING (ADMIN)	✓	✓	✓	✓	✓	✓	✓
TRAINING (USERS)	✓	✗	✓	✓	✓	✓	✓

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 **4 SOLUTIONS**:

-
- Evalato
 - Good2Give
 - Pinkaloo
 - RaiseNow



	AUS	EUR	USA
	GOOD2GIVE	RAISE NOW	PINKALOO
GIVING			
NONPROFIT DATABASE	●	●	◐
NONPROFIT ACCESS	●	●	○
IN-KIND DONATIONS	○	○	◐
GIFT CARDS	○	◐	◐
PAYROLL DEDUCTIONS	●	◐	◐
INTERNATIONAL GIVING & MATCHING	○	●	○
DISASTER RELIEF	●	●	●
AUTOMATIC MATCHES	●	●	◐
PAYMENT OPTIONS	●	●	◐
DASHBOARDS	●	●	◐
REAL-TIME REPORTING	●	●	◐
MAPPING TO UN SDGS	○	○	○

TECHNOLOGY SPECIFICATIONS			
INTERNAL COMMUNICATIONS	✓	✗	✗
EXTERNAL COMMUNICATIONS	✓	✗	✗
INTERNAL SHARING	✗	✓	✓
EXTERNAL SHARING	✓	✓	✓
INTEGRATION	✓	✓	✓
GLOBAL	✗	✓	✗
ACCESS & PERMISSIONS	✓	✓	✓
GDPR	✗	✓	✓

VENDOR SUPPORT			
TECHNICAL SUPPORT (ADMIN)	✓	✓	✓
TECHNICAL SUPPORT (USERS)	✓	✗	✓
TRAINING (ADMIN)	✓	✓	✓
TRAINING (USERS)	✗	✗	✓

	AUS	EUR
	GOOD2GIVE	EVALATO
GRANTS		
APPLICANT DATABASE	●	●
GRANT ELIGIBILITY	◐	◐
GRANT EVALUATION	◐	●
GRANT DISBURSEMENT	●	○
STATUS NOTIFICATIONS	●	●
NONPROFIT ACCESS	◐	●
DASHBOARDS	◐	◐
REAL-TIME REPORTING	●	●

TECHNOLOGY SPECIFICATIONS		
INTERNAL COMMUNICATIONS	✓	✓
EXTERNAL COMMUNICATIONS	✓	✓
INTERNAL SHARING	✗	✓
EXTERNAL SHARING	✓	✓
INTEGRATION	✓	✓
GLOBAL	✗	✓
ACCESS & PERMISSIONS	✓	✗
GDPR	✗	✓

VENDOR SUPPORT		
TECHNICAL SUPPORT (ADMIN)	✓	✓
TECHNICAL SUPPORT (USERS)	✓	✓
TRAINING (ADMIN)	✓	✓
TRAINING (USERS)	✗	✓

SOLUTIONS NOT FEATURED

RWI ALSO 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 51 solution providers, 11 **declined to participate** or were **unresponsive to attempts to reach out**.

VOLUNTEERING, GIVING & GRANTS

BRIGHT FUNDS

San Francisco, CA, USA

DONATIONXCHANGE

Chicago, IL, USA

VOLUNTEERING & GIVING

DOTOPIA

Minneapolis, MN, USA

FRONTSTREAM (Panorama Workplace)

Cambridge, MA, USA

PURPOSED

Sydney, NSW, AUS

VOLUNTEERING

VOLLIE

Melbourne, Victoria, AUS

VSYS ONE

Albany, NY, USA

GIVING

GIVINGFORCE

Harrow, UK

SIMPLY GIVING

Singapore, SEA

GRANTS

FLUIDREVIEW

Ottawa, ON, Canada

SPONSORIUM

Montreal, QC, CAN

MARKET PLAYERS OF INTEREST

WHILE THIS REPORT IS FOCUSED 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 A NOTABLE MARKET PLAYERS.

AMERICA'S CHARITIES

ORGANIZATION TYPE: Nonprofit

PRODUCT NAME(S):

- America's Charities All-In-One Giving Solution (powered by Causecast)
- America's Charities Modern Giving Solution (powered by Pinkaloo)
- America's Charities Simply Giving Solution (powered by StratusLIVE)
- America's Charities Quick Start Solution (powered by America's Charities)

LOCATION: Chantilly, VA, USA

UNIQUE MARKET OFFERING:

America's Charities is a nonprofit that offers employers giving and engagement tools and back-end charitable funds management services. Tools and services are tailored to meet specific client needs, deliver personalized, social online giving experiences, and achieve their giving and social impact goals. America's Charities also provides Employee Assistance Funds (EAF) services for companies who desire to support their employees experiencing a financial hardship.

NOTABLE PARTNERSHIPS AND/OR INTEGRATIONS:

- Pinkaloo
- SmartSimple
- StratusLIVE
- GlobalGiving
- GiftaGood
- EdBacker
- Double the Donation
- VolunteerMatch
- US Chamber of Commerce Foundation

CHARITIES AID FOUNDATION (CAF)

ORGANIZATION TYPE: Nonprofit

LOCATION: UK, USA, Canada, Russia, India, Brazil, Bulgaria, South Africa, Australia

UNIQUE MARKET OFFERING:

Specialists in transformational impact and "making giving count," CAF offers strategic advice on sustainability, CSR, and giving strategies including corporate foundations, online grant making, charitable fund holding for companies, employee giving, UK and global charity verification and safe payment.

In the UK, CAF also offers a full range of financial services and strategic advice to enhance charity resilience, whilst publishing research and working to improve the policy and regulatory environment for civil society.

NOTABLE PARTNERSHIPS AND/OR INTEGRATIONS:

- CIVICUS – World Alliance for Citizen Participation
- WINGS (Worldwide Initiative for Grantmaker Support)
- Social Value International
- EUCLID Network
- European Foundation Centre
- Asian Venture Philanthropy Network
- European Venture Philanthropy Association
- Philanthropy Impact
- Transnational Giving Europe

DOUBLE THE DONATION

ORGANIZATION TYPE: Business

PRODUCT NAME(S):

- Double the Donation Premium Plan
- 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. This information, combined with Double the Donation's suite of matching gift automation tools, propels the matching gift fundraising at thousands of nonprofits and higher educational institutions.

NOTABLE PARTNERSHIPS AND/OR INTEGRATIONS:

- **CRM:** Salesforce, Blackbaud, Ellucian, NeonCRM, Kindful, DonorPerfect, Virtuous, and many others
- **Donation Tools:** Luminate, Soapbox Engage, DonateKindly, Salsa Engage, DonorBox, iDonate, and many others
- **Peer-to-Peer Fundraising Platforms:** Classy, Rallybound, Teamraiser, Funraise, Qgiv, and many others

THE LONELY ENTREPRENEUR

ORGANIZATION TYPE: Social Enterprise

PRODUCT NAME: The Lonely Entrepreneur Learning Community

LOCATION: Globally accessible with locations in NY, NJ, MA, TN, and CO, USA.

UNIQUE MARKET OFFERING:

The Lonely Entrepreneur Learning Community enables organizations to empower hundreds or thousands of individuals with the full spectrum of critical entrepreneurial education and ongoing support they need to realize their potential, live more fulfilling lives, and contribute to building strong communities. The platform facilitates corporate social responsibility and community engagement efforts in a scalable way that quickly extends reach and broadens impacts.

NOTABLE PARTNERSHIPS AND/OR INTEGRATIONS:

- Pfizer
- WeWork
- Dale Moss (Former NFL Player)
- NFLPA
- Future Business Leaders of America
- World Woman Summit
- Future Founders
- World Chicago (US State Department)
- NYU
- Junior Achievement
- American Muslim Consumer Consortium
- EisnerAmper LLP
- Pennsylvania State University

VOLUNTEERMATCH

ORGANIZATION TYPE: Nonprofit

PRODUCT NAME:

- VolunteerMatch Network (accessible via popular third-party platforms)
- YourMatch (reviewed in this report)

LOCATION: Oakland, CA, USA; staff throughout the USA

UNIQUE MARKET OFFERING:

VolunteerMatch is the web's largest volunteer engagement network. VolunteerMatch is a nonprofit passionate about using technology to create better ways for good people and good causes to connect. Corporate services are aimed at creating new possibilities to connect the talent of the business sector with the needs of the social sector at scale. VolunteerMatch provides their community of clients with real-time access to the volunteer needs of their community so that more employees can find an opportunity to put their talent and skill to good use.

NOTABLE PARTNERSHIPS AND/OR INTEGRATIONS:

- YourCause/Blackbaud
- CyberGrants
- Bright Funds
- Causecast/America's Charities
- MobileServe
- LinkedIn for Good
- johnlegend.com
- 150+ corporate clients (including Target, Cisco, Box, US Bank, IBM, Starbucks)



SECTION 3

SOLUTION SPOTLIGHTS

AN IN-DEPTH REVIEW OF
17 TECHNOLOGY SOLUTIONS

SOLUTION SPOTLIGHTS

OVERVIEW

17 OF 40 SOLUTION PROVIDERS AGREED TO LET US TAKE A CLOSER LOOK

OF THE 40 REVIEWED IN THIS REPORT, **17 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

- All-in-One Giving Solution (America's Charities, Powered by Causecast)
- Benevity
- Benjo
- CyberGrants
- Fluxx
- GivingTrax
- GozAround
- SmartSimple
- WeSpire
- YourCause + Blackbaud

VOLUNTEERING & GIVING

- Alaya
- Aplanet
- Goodup
- Philanthropy Cloud (Salesforce)
- StratusLIVE

VOLUNTEERING

- YourMatch (VolunteerMatch)

GIVING & GRANTS






- Good2Give

RWI DOES NOT ADVISE THE SELECTION OF PLATFORM EXCLUSIVELY BASED ON WHAT THIS REPORT CONTAINS. THIS REPORT 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 AND 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).

Volunteering: Active opportunities (proprietary) is the one exception to the evaluation key above. 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.


*RWI analyst discretion.


TECHNOLOGY SPECIFICATIONS & VENDOR SUPPORT

-  **Yes** | Technology capability/vendor support option is available.
-  **No** | Technology capability/vendor support option is not available.

Notes | Additional or qualifying notes on technology capability/vendor support option.

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

-  **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
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

Volunteer opportunity & 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.).
Proprietary volunteer opportunity database	Database of opportunities is owned, populated or curated, and managed by the solution provider. Database is accessible to employees upon platform implementation.
Active opportunities (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.
Real-time database (proprietary)	Database is updated and available to employees in real-time (i.e. there is no down time between when updates are made to opportunities and when employees have access to them).
Volunteer opportunity database integration	Platform is integrated with third-party source of volunteering opportunities, or clients are able to subscribe to third-party sources via the platform.
Pushed volunteer 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 pushed to users in a variety of ways which can include but is not limited to notifications, emails, and dashboard suggestions.
Volunteer opportunity 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.
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 result for nonprofit partner requests.
Basic event creation & management	Users and admins can create events associated with a volunteering opportunity (i.e. non-profit). Individuals or teams of employees can sign up for the event and receive event information and updates.
Complex event creation & management	Users and admins can create complex events associated with a volunteering opportunity (i.e. non-profit), which may include but is not limited to, the ability to configure event series, shifts, and restrictions. Individuals or teams of employees can sign up for the event and receive event information and updates.
Disaster relief	Users and administrators can create volunteering opportunities related to disaster relief efforts within the community.
Nonprofit access	Nonprofits have access to an external-facing portal as a means to posting and managing volunteering events.

*Refer to this feature's unique Evaluation Key.

VOLUNTEERING (CONTINUED)

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, and fundraising opportunities.
Self-reporting	Volunteers are able to self-report volunteer hours for volunteer events initiated within the system and outside of the system (i.e. volunteer hours performed not with their company).
Hours administration	Admins can enter and/or validate volunteer hours on behalf of employees.
Nonprofit hours validation	Nonprofits can validate employee volunteer hours through an external-facing interface.
Individual volunteering PTO	Users can enact and track volunteering paid-time-off (PTO).
Team volunteering PTO	Users, Admins or managers can enact and track volunteering paid-time-off (PTO) on an individual and/or team basis.
Dollars for Doers bank	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 employee to make donations from their rewards account to a nonprofit of choice.
Competitions	Competitions can be hosted between individuals or groups by department, site, or another employee attribute. Competitions are configured to have a timebound 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 activity of individuals and groups across the company.
Volunteer profile	Users have a personal profile which may include but is not limited to 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.
Volunteer time	Admins can report on volunteer hours by various criteria which may include but is not limited to 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 but is not limited to volunteer hours to date, upcoming events, competition progress or results, nonprofits helped, or balance of rewards bank.
Data & 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 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 (i.e. no lag 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 but is not limited to nonprofit requests, event creation, hours administration approvals, or distribution of rewards.

GIVING

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 result for nonprofit partner requests.
Nonprofit search	Users can search for giving opportunities within and outside of the company by various criteria (location, cause area, etc.).
Nonprofit access	Nonprofits have access to an external-facing portal as a means to post and managing 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 relief (external)	Users and administrators can create giving opportunities related to disaster relief efforts within the community.
Disaster relief (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 activity, 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 & distribution	The solution provider processes and distributes donation funds. Funds are held for distribution in legally protected, externally audited account separate from the provider's operations.
Vetting	Nonprofits are vetted automatically. ("Vetted" meaning verifying that the nonprofit has 510c3 status and other requirements – e.g. OFAC, FATCA). 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 activity of individuals and groups across the company.

GIVING (CONTINUED)

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 but is not limited to employee information, giving history, favorite nonprofits, and cause interests.
Recognition & reward	Uses 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.
Check 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.
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 one-time 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 & 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 (i.e. no lag time).
Tax information	Yearend 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 but is not limited to nonprofit requests, even creation, opportunity creation approvals, or distribution of rewards.

GRANTS

Applicant database	Grant applicants are stored in a database. Admins can view applicants by various criteria (e.g. 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. (“Vetted” meaning verifying that the nonprofit has 510c3 status and other requirements – e.g. OFAC, FATCA). Only nonprofits that match corporate requirements show up when employees search for giving opportunities.
Applicant de-duplication	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	Nonprofits have access to an external-facing portal as a means to apply for and view the status of grants.
Recognition and reward	Uses and admins can recognize individuals or groups for grant activity. Admins can facilitate (manually or automatically) the distribution of rewards to employees.
Direct payment	Company can opt to disburse grant 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 but is not limited to grant activity, company participation, grants disbursed to date, etc.
Data & exports	Data is available in real-time (i.e. no lag time).

GRANTS (CONTINUED)

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 but is not limited to application evaluation, application approvals, etc.

TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	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).
Communications (External)	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).
Sharing (Internal)	Content within the system can be shared by users to other users.
Sharing (External)	Content within the system can be shared by users to external sites.

USABILITY

Access	System is accessible by various methods, including URL, mobile devices, SSO , or unique username and password .
Automation	Program processes can be automated via system workflows , automatic notifications , and form auto-population (based on system and user data).
Error Identification	User and admin entry errors are identified and addressed with rules & alerts, field completion prompts, format validation prompts, submission warning & blocks (based on invalid/duplicate information) and native error support (such as live chat or a knowledge base).
Look & Feel	System look and feel can be customized to client needs, including the logo, color scheme, layout, social media tags and localization elements (such as language). User experience may also be completely customized in a white label solution.
Search	Admins and users can search the system by keyword, event/opportunity , and nonprofit/association .

ARCHITECTURE

Compatibility	Devices and systems with which the solution is compatible.
Deployment	Method by which the system is deployed.
Global	Ability for system to be configured based on complex company hierarchies (i.e. single entity, multi-site, multi-country , or for global operations).
Integration	Ability for system to be integrated with other systems via APIs or custom integration .

SECURITY

GDPR	Status of compliance with GDPR.
Permissions	Levels of access configurable based on role within the program and/or system (i.e. owner, admin, editor or viewer).

VENDOR SUPPORT

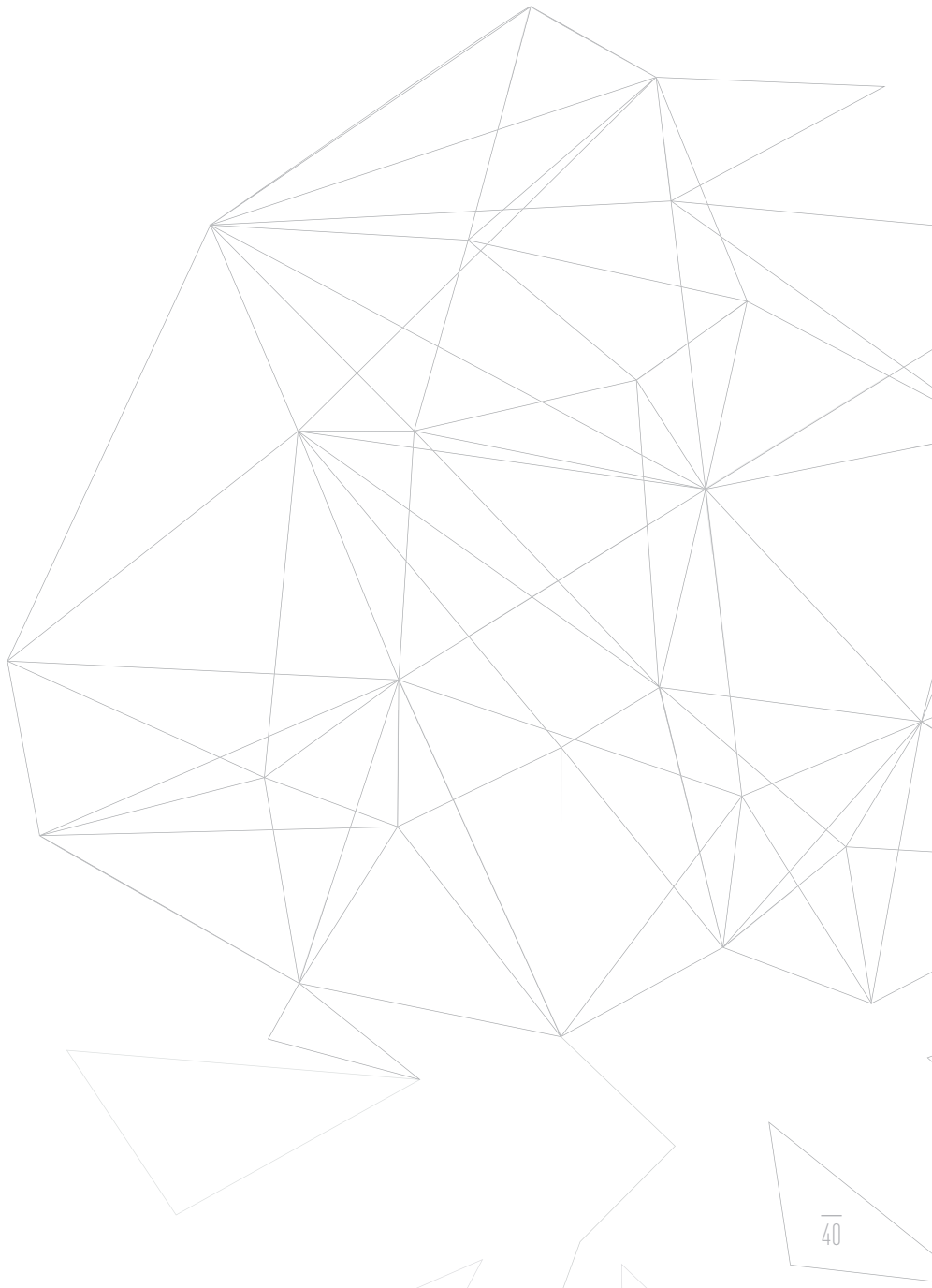
Exception Management	Degree to which help support is integrated throughout platform (i.e. on-screen alerts and explanations, self-service fixes, integrated help options).
Implementation Time	Average length of time required to implement solution.
Platform Languages	Languages available to clients and end-users within the platform.
SLA	Standard service level agreement with client base.
Support Centre Locations	Location of all support centres.
Support Centres	Number of all support centres.
Support Levels	Availability of support to admins, users and external organizations (e.g. nonprofits).
Support Methods	Methods by which support can be accessed or solicited.
Training Methods	Methods by which training can be accessed or solicited.

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 **10 SOLUTIONS**:

- All-in-One Giving Solution
(America's Charities, Powered by Causecast)
- Benevity
- Benoj
- CyberGrants
- Fluxx
- GivingTrax
- GozAround
- SmartSimple
- WeSpire
- YourCause + Blackbaud



ALL-IN-ONE GIVING SOLUTION

VENDOR NAME

America's Charities
(Powered by Causecast)

HQ

Chantilly, VA, USA

FOUNDED

1980

EMPLOYEES

11-50

CLIENT BASE

58 corporations

ORG MARKET

Mid-sized

R&D INVESTMENT

Declined to disclose

FEE STRUCTURE

One-time implementation
+ Annual service fee
+ Funds Management

AMERICA'S CHARITIES PROVIDES SEVERAL SOLUTIONS FOR EMPLOYERS, OF WHICH THE MOST COMPREHENSIVE PLATFORM OFFERING IS ALL-IN-ONE GIVING SOLUTION, POWERED BY CAUSECAST. THE PLATFORM USER EXPERIENCE FEATURES A MODERN AND INTUITIVE DESIGN, EASY TO NAVIGATE WORKFLOWS AND AN INFORMATIVE DASHBOARD.

The platform provides tools for internal team engagement, support for employee community leaders or champions, and gamification via VIP rewards or points. An ecosystem is provided for nonprofits to access reports from supporting donors across

the platform and to manage fundraising and volunteering initiatives. Grantmaking is offered for internal requirements where matching, dollars for doers or in-kind donations are managed via an employee grant request.

America's Charities is a 501(c)(3) nonprofit and provides a range of additional services as part of each platform offering or as stand-alone services to employers, foundations, nonprofits and other platforms. These services include funds management and nonprofit funds disbursement allowing both the solution and supporting services under one entity. Featured services include the ability to offer dedicated Donor-Advised Funds (DAF) and Employee Assistance Funds (EAF).

DEEP DIVE ① FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING		GRANTS	
Volunteer opportunity & event search	Team volunteering PTO	Nonprofit database	Fundraising pages	Applicant database	Recognition and reward
Proprietary volunteer opportunity database	Dollars for Doers bank	Nonprofit profile overview	Funding status notifications	Grant eligibility	Direct payment
Active opportunities (proprietary)	Competitions	Nonprofit partner request	Giving profile	Forms	Checks and EFT deposits
Real-time database (proprietary)	Volunteer communities	Nonprofit search	Recognition & reward	Metadata	Dashboards
Volunteer opportunity database integration	Volunteer profile	Nonprofit access	Check and EFT deposits	Grant application templates	Data & exports
Pushed volunteer recommendations	Recognition and reward	Company foundation	Direct payment	Collaboration	Real-time reporting
Volunteer opportunity creation	Volunteer time	In-kind donations	Fees	Grant evaluation	Workflows
Nonprofit partner request	Post-event surveys	Gift cards	Disbursement cadence	Applicant vetting	
Basic event creation & management	Dashboards	Payroll deductions	Payment options	Applicant de-duplication	
Complex event creation & management	Data & exports	International giving & matching	Admin self-service	Review and approval workflow	
Disaster relief	Real-time reporting	Disaster relief (external)	Dashboards	Approval thresholds	

VOLUNTEERING		GIVING		GRANTS	
<input checked="" type="checkbox"/> Nonprofit access	<input checked="" type="checkbox"/> Mapping to UN SDGs	<input checked="" type="checkbox"/> Disaster relief (internal)	<input checked="" type="checkbox"/> Data & exports	<input type="checkbox"/> Grants agreement templates	
<input checked="" type="checkbox"/> Volunteer event types	<input type="checkbox"/> Workflows	<input checked="" type="checkbox"/> Automatic matches	<input checked="" type="checkbox"/> Future forecasting	<input checked="" type="checkbox"/> Grant disbursement	
<input checked="" type="checkbox"/> Self-reporting		<input type="checkbox"/> Match optimization	<input checked="" type="checkbox"/> Real-time reporting	<input checked="" type="checkbox"/> Volunteer grants	
<input checked="" type="checkbox"/> Hours administration		<input checked="" type="checkbox"/> Thresholds	<input type="checkbox"/> Tax information	<input type="checkbox"/> Status notifications	
<input type="checkbox"/> Nonprofit hours validation		<input checked="" type="checkbox"/> Processing & distribution	<input type="checkbox"/> Mapping to UN SDGs	<input checked="" type="checkbox"/> Email records	
<input type="checkbox"/> Individual volunteering PTO		<input checked="" type="checkbox"/> Vetting	<input checked="" type="checkbox"/> Workflows	<input type="checkbox"/> Nonprofit access	

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

	One-Way	Two-Way	INCLUDES...
Communications (Internal)	One-Way	Two-Way	News, announcements, Volunteer Coordinator-Team direct messaging
Communications (External)	One-Way	Two-Way	Social sharing of fundraising pages
Sharing (Internal)	Available	Unavailable	Event photo sharing
Sharing (External)	Available	Unavailable	Email, social media sharing

USABILITY

	URL	Mobile-Friendly	SSO	Username & Password		
Access	Workflows	Notifications	Form Auto-Population			
Automation	Rules & Alerts	Field Completion	Format Validation	Submission Warnings & Blocks		Native Error Support
Error Identification	Logo	Colors	Layout	Social Media Tags	Localizations	White Label
Look & Feel	Keyword	Event/Opportunity	Nonprofit/Association			
Search						

ARCHITECTURE

	Windows (Browser)	Mac OS (Browser)	Linux (Browser)	Android (Browser)	iOS (Browser)
Compatibility	On-Premise	Cloud (SaaS)	Hybrid		
Deployment	Single Entity	Multi-Site	Multi-Country	Global	
Global	Out-of-the-box APIs	Custom Integration			
Integration					

SECURITY

	Compliant	Non-Compliant			
GDPR	Compliant	Non-Compliant			
Permissions	Owner (all access)	Admin	Editor (create and manage content)	Viewer (end user)	

3 VENDOR SUPPORT

	On-Screen Alerts	On-Screen Explanations	Self-Service Fixes	Integrated Help Options		
Exception Management	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
Implementation Time	Arabic	Chinese (Simplified)	Chinese (Traditional)	Czech	Dutch	English (UK)
Platform Languages	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)			
Support Centres	1 support centre					
Support Centre Locations	Chantilly, VA					
Support Levels	Client Admin	User	External			
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

BENEVITY

VENDOR NAME

Benevity

HQ

Calgary, AB, Canada

FOUNDED

2008

EMPLOYEES

501-1000

CLIENT BASE

600+ organizations

ORG MARKET

All markets

R&D INVESTMENT

Declined to disclose

FEE STRUCTURE

Setup + Annual subscription (volume-based)

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 powerful 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.

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 the Community Impact offering.

DEEP DIVE ① FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING		GRANTS	
● Volunteer opportunity & event search	● Team volunteering PTO	● Nonprofit database	● Fundraising pages	● Applicant database	● Recognition and reward
● Proprietary volunteer opportunity database	● Dollars for Doers bank	● Nonprofit profile overview	● Funding status notifications	● Grant eligibility	● Direct payment
● Active opportunities (proprietary)	● Competitions	● Nonprofit partner request	● Giving profile	● Forms	● Checks and EFT deposits
● Real-time database (proprietary)	● Volunteer communities	● Nonprofit search	● Recognition & reward	● Metadata	● Dashboards
● Volunteer opportunity database integration	● Volunteer profile	● Nonprofit access	● Check and EFT deposits	● Grant application templates	● Data & exports
● Pushed volunteer recommendations	● Recognition and reward	● Company foundation	● Direct payment	● Collaboration	● Real-time reporting
● Volunteer opportunity creation	● Volunteer time	● In-kind donations	● Fees	● Grant evaluation	● Workflows
● Nonprofit partner request	● Post-event surveys	● Gift cards	● Disbursement cadence	● Applicant vetting	
● Basic event creation & management	● Dashboards	● Payroll deductions	● Payment options	● Applicant de-duplication	
● Complex event creation & management	● Data & exports	● International giving & matching	● Admin self-service	● Review and approval workflow	
● Disaster relief	● Real-time reporting	● Disaster relief (external)	● Dashboards	● Approval thresholds	

VOLUNTEERING		GIVING		GRANTS	
● Nonprofit access	● Mapping to UN SDGs	● Disaster relief (internal)	● Data & exports	● Grants agreement templates	
● Volunteer event types	● Workflows	● Automatic matches	● Future forecasting	● Grant disbursement	
● Self-reporting		● Match optimization	● Real-time reporting	● Volunteer grants	
● Hours administration		● Thresholds	● Tax information	● Status notifications	
● Nonprofit hours validation		● Processing & distribution	● Mapping to UN SDGs	● Email records	
● Individual volunteering PTO		● Vetting	● Workflows	● Nonprofit access	

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

	One-Way	Two-Way	INCLUDES...
Communications (Internal)	One-Way	Two-Way	Blog within opportunities, direct message via Teams, (in)direct Admin communication
Communications (External)	One-Way	Two-Way	Email messages and notifications; direct messaging (grantmaking portal only)
Sharing (Internal)	Available	Unavailable	News, Blogs, event photo sharing
Sharing (External)	Available	Unavailable	Share directly to online communities, social media platforms

USABILITY

Access	URL	Mobile-Friendly	SSO	Username & Password		
Automation	Workflows	Notifications	Form Auto-Population			
Error Identification	Rules & Alerts	Field Completion	Format Validation	Submission Warnings & 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)	Mac OS (Browser)	Linux (Browser)	Android (App)	iOS (App)
Deployment	On-Premise	Cloud (SaaS) (Multi-Tenant)			Hybrid
Global	Single Entity	Multi-Site	Multi-Country	Global	
Integration	Out-of-the-box APIs	Custom Integration			

SECURITY

GDPR	Compliant	Non-Compliant			
Permissions	Owner	Admin	Editor	Viewer	Up to 30 configurable roles

3 VENDOR SUPPORT

Exception Management	On-Screen Alerts	On-Screen Explanations	Self-Service Fixes	Integrated Help Options		
Implementation Time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
Platform 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)			
Support Centres	5 Benevity support centres; 68 local support centres globally (all time zones)					
Support Centre Locations	San Mateo, CA, USA; Calgary, AB, Canada; Victoria, BC, Canada; Toronto, ON, Canada; London, UK; Remote					
Support Levels	Client Admin	User	External			
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

BENOJO

THE BASICS

VENDOR NAME

Benojo

HQ

Surrey Hills, NSW, AU

FOUNDED

2014

EMPLOYEES

11-50

CLIENT BASE

1000+ organizations
(209 corporations)

ORG MARKET

Mid-sized

R&D INVESTMENT

\$7M

FEE STRUCTURE

Monthly subscription
(volume-based)

AT-A-GLANCE

BENOJO IS AN ECOSYSTEM IN WHICH INDIVIDUALS, SCHOOLS, COMPANIES AND NONPROFITS CAN PARTICIPATE IN PHILANTHROPIC ACTIONS. THE USER-CENTERED PLATFORM ALLOWS ANYONE TO INITIATE A FUNDRAISING CAMPAIGN AND SHARE THE RESPECTIVE PAGES ON SOCIAL MEDIA TO DRIVE ATTENDANCE AND PARTICIPATION.

Volunteering campaigns are initiated by either the client company or nonprofit. Further evidence of the user-centered experience is the portability of user profiles: users can retain their profile as they move between companies or out of the job market, making the marketplace truly user-driven.

Benojo provides practitioners with tools to monitor and leverage marketplace activity in alignment with organizational priorities. Administrators are assisted by multi-level reporting tools to

conduct basic reporting on event, campaign, and organizational activity. To support strategic and financial planning efforts for both practitioners and nonprofits, Benojo encourages users to disclose their giving intentions within their profiles as it relates to a dollar amount and alignment with the UN Sustainable Development Goals.

Benojo has a “no barrier” approach to marketplace membership, wherein base-level profiles for companies, charities, schools, clubs and individuals are free. Premium features (e.g. payroll giving, dollar matching, employee grants) are offered at a price to organizations. Benojo provides member organizations with educational service on best practice for measuring impact.

Currently the platform operates in Australia only, part of the development roadmap includes expanding to other jurisdictions.

DEEP DIVE ① FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING		GRANTS	
<input checked="" type="checkbox"/> Volunteer opportunity & event search	<input checked="" type="checkbox"/> Team volunteering PTO	<input checked="" type="checkbox"/> Nonprofit database	<input checked="" type="checkbox"/> Fundraising pages	<input checked="" type="checkbox"/> Applicant database	<input checked="" type="checkbox"/> Recognition and reward
<input checked="" type="checkbox"/> Proprietary volunteer opportunity database	<input type="checkbox"/> Dollars for Doers bank	<input checked="" type="checkbox"/> Nonprofit profile overview	<input checked="" type="checkbox"/> Funding status notifications	<input type="checkbox"/> Grant eligibility	<input checked="" type="checkbox"/> Direct payment
<input checked="" type="checkbox"/> Active opportunities (proprietary)	<input checked="" type="checkbox"/> Competitions	<input checked="" type="checkbox"/> Nonprofit partner request	<input checked="" type="checkbox"/> Giving profile	<input checked="" type="checkbox"/> Forms	<input type="checkbox"/> Checks and EFT deposits
<input checked="" type="checkbox"/> Real-time database (proprietary)	<input checked="" type="checkbox"/> Volunteer communities	<input checked="" type="checkbox"/> Nonprofit search	<input type="checkbox"/> Recognition & reward	<input type="checkbox"/> Metadata	<input checked="" type="checkbox"/> Dashboards
<input type="checkbox"/> Volunteer opportunity database integration	<input checked="" type="checkbox"/> Volunteer profile	<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"/> Data & exports
<input checked="" type="checkbox"/> Pushed volunteer recommendations	<input checked="" type="checkbox"/> Recognition and reward	<input checked="" type="checkbox"/> Company foundation	<input checked="" type="checkbox"/> Direct payment	<input type="checkbox"/> Collaboration	<input checked="" type="checkbox"/> Real-time reporting
<input checked="" type="checkbox"/> Volunteer opportunity creation	<input checked="" type="checkbox"/> Volunteer time	<input checked="" type="checkbox"/> In-kind donations	<input checked="" type="checkbox"/> Fees	<input type="checkbox"/> Grant evaluation	<input checked="" type="checkbox"/> Workflows
<input checked="" type="checkbox"/> Nonprofit partner request	<input checked="" type="checkbox"/> Post-event surveys	<input type="checkbox"/> Gift cards	<input type="checkbox"/> Disbursement cadence	<input type="checkbox"/> Applicant vetting	
<input checked="" type="checkbox"/> Basic event creation & management	<input checked="" type="checkbox"/> Dashboards	<input checked="" type="checkbox"/> Payroll deductions	<input checked="" type="checkbox"/> Payment options	<input type="checkbox"/> Applicant de-duplication	
<input checked="" type="checkbox"/> Complex event creation & management	<input checked="" type="checkbox"/> Data & exports	<input checked="" type="checkbox"/> International giving & matching	<input checked="" type="checkbox"/> Admin self-service	<input type="checkbox"/> Review and approval workflow	

VOLUNTEERING		GIVING		GRANTS	
<input checked="" type="checkbox"/> Disaster relief	<input checked="" type="checkbox"/> Real-time reporting	<input checked="" type="checkbox"/> Disaster relief (external)	<input type="checkbox"/> Dashboards	<input type="checkbox"/> Approval thresholds	
<input checked="" type="checkbox"/> Nonprofit access	<input checked="" type="checkbox"/> Mapping to UN SDGs	<input type="checkbox"/> Disaster relief (internal)	<input checked="" type="checkbox"/> Data & exports	<input type="checkbox"/> Grants agreement templates	
<input checked="" type="checkbox"/> Volunteer event types	<input type="checkbox"/> Workflows	<input type="checkbox"/> Automatic matches	<input type="checkbox"/> Future forecasting	<input type="checkbox"/> Grant disbursement	
<input checked="" type="checkbox"/> Self-reporting		<input type="checkbox"/> Match optimization	<input checked="" type="checkbox"/> Real-time reporting	<input type="checkbox"/> Volunteer grants	
<input checked="" type="checkbox"/> Hours administration		<input checked="" type="checkbox"/> Thresholds	<input checked="" type="checkbox"/> Tax information	<input type="checkbox"/> Status notifications	
<input checked="" type="checkbox"/> Nonprofit hours validation		<input checked="" type="checkbox"/> Processing & distribution	<input checked="" type="checkbox"/> Mapping to UN SDGs	<input type="checkbox"/> Email records	
<input checked="" type="checkbox"/> Individual volunteering PTO		<input type="checkbox"/> Vetting	<input type="checkbox"/> Workflows	<input type="checkbox"/> Nonprofit access	

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS			INCLUDES...
Communications (Internal)	One-Way	Two-Way	In-platform notifications, reminders, administrator emails
Communications (External)	One-Way	Two-Way	Direct message via profiles (admin-nonprofits)
Sharing (Internal)	Available	Unavailable	Photo sharing, event messages (admin only); comments, activity/campaign pages
Sharing (External)	Available	Unavailable	Social media sharing (Facebook); email sharing

USABILITY						
Access	URL	Mobile-Friendly	SSO	Username & Password		
Automation	Workflows	Notifications	Form Auto-Population			
Error Identification	Rules & Alerts	Field Completion	Format Validation	Submission Warnings & 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)	Mac OS (Browser)	Linux (Browser)	Android (Browser)	iOS (Browser)
Deployment	On-Premise	Cloud (SaaS) (Multi-Tenant)		Hybrid	
Global	Single Entity	Multi-Site	Multi-Country	Global	
Integration	Out-of-the-box APIs	Custom Integration	Stripe, Zapier		

SECURITY				
GDPR	Compliant	Non-Compliant		
Permissions	Owner	Admin	Editor	Viewer

3 VENDOR SUPPORT

Exception Management	On-Screen Alerts	On-Screen Explanations	Self-Service Fixes	Integrated Help Options		
Implementation Time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
Platform 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	Depends on channel; response time between 15 minutes to 1 hour			
Support Centres	1 support centre					
Support Centre Locations	Sydney, Australia					
Support Levels	Client Admin	User	External			
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

CYBERGRANTS

VENDOR NAME

CyberGrants

HQ

Andover, MA, USA

FOUNDED

1999

EMPLOYEES

51-200

CLIENT BASE

450 corporations

ORG MARKET

Large/Enterprise

R&D INVESTMENT

~20% Revenue

FEE STRUCTURE

One-time implementation + annual subscription (volume-based)

CYBERGRANTS PRIDES ITSELF IN OFFERING A HIGHLY CONFIGURABLE PLATFORM THAT ENABLES CLIENTS WITH COMPLEX BUSINESS PROCESSES AND STRUCTURES TO TAILOR THE PLATFORM TO REFLECT INDIVIDUAL CORPORATE PROGRAMS. THE CORE OF THE PLATFORM IS AN AGILE WORKFLOW ENGINE UTILIZING A UNIFIED DATA WAREHOUSE.

CyberGrants offers simple and intuitive interfaces with clean stylized visual elements, native viral engagement capabilities including gamification features, making the platform easy and flexible for employees to engage with.

CyberGrants is aware of the importance of guiding clients through the platform, which is garnered from best practices gathered from over 20 years of industry experience and knowledge pulled from a client base of over 450 organizations. This experience extends to the ability to help clients integrate the platform with multiple other organizational systems.

CyberGrants has its roots in Grantmaking and offers strong functionality to manage grant programs. Since inception, they have expanded their offerings to both Employee Volunteering and Giving & Matching programs to provide a single source of truth for all workplace citizenship programs. CyberGrants is focused on improving the processes and relationships between their clients and NPOs and are looking to make enhancements later this year to support this initiative.

DEEP DIVE ① FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING		GRANTS	
● Volunteer opportunity & event search	● Team volunteering PTO	● Nonprofit database	● Fundraising pages	● Applicant database	● Recognition and reward
○ Proprietary volunteer opportunity database	● Dollars for Doers bank	● Nonprofit profile overview	● Funding status notifications	● Grant eligibility	● Direct payment
● Active opportunities (proprietary)	● Competitions	● Nonprofit partner request	● Giving profile	● Forms	● Checks and EFT deposits
● Real-time database (proprietary)	● Volunteer communities	● Nonprofit search	● Recognition & reward	● Metadata	● Dashboards
● Volunteer opportunity database integration	● Volunteer profile	● Nonprofit access	● Check and EFT deposits	● Grant application templates	● Data & exports
● Pushed volunteer recommendations	● Recognition and reward	● Company foundation	● Direct payment	● Collaboration	● Real-time reporting
● Volunteer opportunity creation	● Volunteer time	● In-kind donations	● Fees	● Grant evaluation	● Workflows
● Nonprofit partner request	● Post-event surveys	● Gift cards	● Disbursement cadence	● Applicant vetting	
● Basic event creation & management	● Dashboards	● Payroll deductions	● Payment options	● Applicant de-duplication	
● Complex event creation & management	● Data & exports	● International giving & matching	● Admin self-service	● Review and approval workflow	
● Disaster relief	● Real-time reporting	● Disaster relief (external)	● Dashboards	● Approval thresholds	

VOLUNTEERING		GIVING		GRANTS	
● Nonprofit access	● Mapping to UN SDGs	● Disaster relief (internal)	● Data & exports	● Grants agreement templates	
● Volunteer event types	● Workflows	● Automatic matches	● Future forecasting	● Grant disbursement	
● Self-reporting		● Match optimization	● Real-time reporting	● Volunteer grants	
● Hours administration		● Thresholds	● Tax information	● Status notifications	
● Nonprofit hours validation		● Processing & distribution	● Mapping to UN SDGs	● Email records	
● Individual volunteering PTO		● Vetting	● Workflows	● Nonprofit access	

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS			INCLUDES...
Communications (Internal)	One-Way	Two-Way	Email, messaging, message boards, pushed content
Communications (External)	One-Way	Two-Way	Automated messages to NPOs
Sharing (Internal)	Available	Unavailable	Activity feed, photo sharing, event sharing, peer recognition
Sharing (External)	Available	Unavailable	Social media (Facebook, Twitter, LinkedIn, Google +)

USABILITY					
Access	URL	Mobile-Friendly	SSO	Username & Password	
Automation	Workflows	Notifications	Form Auto-Population		
Error Identification	Rules & Alerts	Field Completion	Format Validation	Submission Warnings & Blocks	Native Error Support
Look & Feel	Logo	Colors	Layout	Social Media Tags	Localizations
Search	Keyword	Event/Opportunity	Nonprofit/Association		White Label

ARCHITECTURE					
Compatibility	Windows (Browser)	Mac OS (Browser)	Linux (Browser)	Android (Mobile-Responsive)	iOS (Mobile-Responsive)
Deployment	On-Premise	Cloud (SaaS) (Multi-Tenant)		Hybrid	
Global	Single Entity	Multi-Site	Multi-Country	Global	
Integration	Out-of-the-box APIs	Custom Integration	HRMS, payroll, calendars, social media; API or SFTP		

SECURITY					
GDPR	Compliant	Non-Compliant			
Permissions	Owner (All access)	Admin (Budget admin)	Editor (Basic and Strict Basic)	Viewer (Viewer and Strict Viewer)	

3 VENDOR SUPPORT

Exception Management	On-Screen Alerts	On-Screen Explanations	Self-Service Fixes	Integrated Help Options	
Implementation Time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months
Platform 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	60 minutes, 8 hours or 48 hours		
Support Centres	2 support centres				
Support Centre Locations	Andover, MA, USA (ET); Princeton, NJ, USA (ET)				
Support Levels	Client Admin	User	External		
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)
					Third Party

VENDOR NAME
Fluxx Labs Inc.

HQ
San Francisco, CA, USA

FOUNDED
2010

EMPLOYEES
80

CLIENT BASE
250+ corporations

ORG MARKET
Mid-sized, Large/
Enterprise

R&D INVESTMENT
40%+ annual revenue

FEE STRUCTURE
One-time implementation
+ annual subscription
(complexity-based)

FLUXX IS A GLOBAL CLOUD-BASED GRANTMAKING AND BUSINESS AUTOMATION PLATFORM DESIGNED FOR LARGER FOUNDATIONS AND OTHER FUNDING ORGANIZATIONS THAT HAVE COMPLEX STRUCTURES AND/OR BUSINESS PROCESSES.

Fluxx offers a highly configurable and scalable platform designed to adapt to the diverse and changing needs of grant programs. The platform caters to small IT or non-technical teams with a “no coding required” environment with simple drag-and-drop functionality to configure platform elements (including look and feel, workflows, forms, reporting and more).

The user interface offers the ability to toggle between a modern card or traditional tabular style, allowing users to interact with information visually. Fluxx offers robust administration, reporting, and integration requirements, including SSO, payments disbursement, communication, and external grantee data validation services.

Clients can manage volunteer or gift matching requirements through the platform by leveraging grant application functionality. Fluxx also offers Grantseeker, which is a free all-in-one Grantmaking system for nonprofits to track and manage the grants process within or outside of the Fluxx platform.

DEEP DIVE ① FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING		GRANTS	
<input type="checkbox"/> Volunteer opportunity & event search	<input checked="" type="checkbox"/> Team volunteering PTO	<input checked="" type="checkbox"/> Nonprofit database	<input type="checkbox"/> Fundraising pages	<input checked="" type="checkbox"/> Applicant database	<input type="checkbox"/> Recognition and reward
<input type="checkbox"/> Proprietary volunteer opportunity database	<input type="checkbox"/> Dollars for Doers bank	<input checked="" type="checkbox"/> Nonprofit profile overview	<input checked="" type="checkbox"/> Funding status notifications	<input checked="" type="checkbox"/> Grant eligibility	<input type="checkbox"/> Direct payment
Active opportunities (proprietary)	<input type="checkbox"/> Competitions	<input checked="" type="checkbox"/> Nonprofit partner request	<input checked="" type="checkbox"/> Giving profile	<input checked="" type="checkbox"/> Forms	<input checked="" type="checkbox"/> Checks and EFT deposits
Real-time database (proprietary)	<input type="checkbox"/> Volunteer communities	<input checked="" type="checkbox"/> Nonprofit search	<input type="checkbox"/> Recognition & reward	<input checked="" type="checkbox"/> Metadata	<input checked="" type="checkbox"/> Dashboards
<input type="checkbox"/> Volunteer opportunity database integration	<input checked="" type="checkbox"/> Volunteer profile	<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"/> Data & exports
<input type="checkbox"/> Pushed volunteer recommendations	<input type="checkbox"/> Recognition and reward	<input checked="" type="checkbox"/> Company foundation	<input type="checkbox"/> Direct payment	<input checked="" type="checkbox"/> Collaboration	<input checked="" type="checkbox"/> Real-time reporting
<input type="checkbox"/> Volunteer opportunity creation	<input checked="" type="checkbox"/> Volunteer time	<input checked="" type="checkbox"/> In-kind donations	<input type="checkbox"/> Fees	<input checked="" type="checkbox"/> Grant evaluation	<input checked="" type="checkbox"/> Workflows
<input checked="" type="checkbox"/> Nonprofit partner request	<input checked="" type="checkbox"/> Post-event surveys	<input type="checkbox"/> Gift cards	<input checked="" type="checkbox"/> Disbursement cadence	<input checked="" type="checkbox"/> Applicant vetting	
<input checked="" type="checkbox"/> Basic event creation & management	<input checked="" type="checkbox"/> Dashboards	<input checked="" type="checkbox"/> Payroll deductions	<input type="checkbox"/> Payment options	<input checked="" type="checkbox"/> Applicant de-duplication	
<input type="checkbox"/> Complex event creation & management	<input checked="" type="checkbox"/> Data & exports	<input checked="" type="checkbox"/> International giving & matching	<input checked="" type="checkbox"/> Admin self-service	<input checked="" type="checkbox"/> Review and approval workflow	
<input type="checkbox"/> Disaster relief	<input checked="" type="checkbox"/> Real-time reporting	<input checked="" type="checkbox"/> Disaster relief (external)	<input checked="" type="checkbox"/> Dashboards	<input checked="" type="checkbox"/> Approval thresholds	
<input type="checkbox"/> Nonprofit access	<input type="checkbox"/> Mapping to UN SDGs	<input checked="" type="checkbox"/> Disaster relief (internal)	<input checked="" type="checkbox"/> Data & exports	<input checked="" type="checkbox"/> Grants agreement templates	

VOLUNTEERING		GIVING		GRANTS	
<input type="radio"/> Volunteer event types	<input checked="" type="radio"/> Workflows	<input checked="" type="radio"/> Automatic matches	<input checked="" type="radio"/> Future forecasting	<input checked="" type="radio"/> Grant disbursement	
<input checked="" type="radio"/> Self-reporting		<input checked="" type="radio"/> Match optimization	<input checked="" type="radio"/> Real-time reporting	<input checked="" type="radio"/> Volunteer grants	
<input checked="" type="radio"/> Hours administration		<input checked="" type="radio"/> Thresholds	<input checked="" type="radio"/> Tax information	<input checked="" type="radio"/> Status notifications	
<input checked="" type="radio"/> Nonprofit hours validation		<input type="radio"/> Processing & distribution	<input type="radio"/> Mapping to UN SDGs	<input checked="" type="radio"/> Email records	
<input checked="" type="radio"/> Individual volunteering PTO		<input checked="" type="radio"/> Vetting	<input checked="" type="radio"/> Workflows	<input checked="" type="radio"/> Nonprofit access	

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS			INCLUDES...
Communications (Internal)	One-Way	Two-Way	"Signals" (notes, threaded discussions)
Communications (External)	One-Way	Two-Way	"Signals" (notes, threaded discussions)
Sharing (Internal)	Available	Unavailable	Documents, photo sharing, nonprofit storytelling
Sharing (External)	Available	Unavailable	Social media integration (Grantseeker users only)

USABILITY						
Access	URL	Mobile-Friendly	SSO	Username & Password		
Automation	Workflows	Notifications	Form Auto-Population			
Error Identification	Rules & Alerts	Field Completion	Format Validation	Submission Warnings & 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)	Mac OS (Browser)	Linux	Android (App)	iOS (App)
Deployment	On-Premise	Cloud (SaaS) (Single-Tenant, Multi-Tenant)		Hybrid	
Global	Single Entity	Multi-Site	Multi-Country	Global	
Integration	Out-of-the-box APIs	Custom Integration	Intacct, NetSuite, DocuSign, Salesforce, Microsoft Office, Google Maps, GuideStar, FoundationCenter, Bridger		

SECURITY					
GDPR	Compliant	Non-Compliant			
Permissions	Owner	Admin	Editor	Viewer	Configurable by profile, role and program assignment

3 VENDOR SUPPORT

Exception Management	On-Screen Alerts	On-Screen Explanations	Self-Service Fixes	Integrated Help Options		
Implementation Time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	
Platform 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	Priority 1 (24-hour resolution); Priority 2 (15-day resolution); Priority 3 (as possible); Priority 4 (as possible)		
	Support Centres	1 support centre				
	Support Centre Locations	San Francisco, CA, USA				
	Support Levels	Client Admin	User	External		
	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)	
					Third Party	

GIVINGTRAX

VENDOR NAME

GivingTrax Cloud Software

HQ

Tacoma, WA, USA

FOUNDED

2010

EMPLOYEES

11-50

CLIENT BASE

Declined to disclose

ORG MARKET

Mid-sized

R&D INVESTMENT

\$1.8M

FEE STRUCTURE

Monthly subscription with annual option (volume-based) + one-time campaign licenses

GIVINGTRAX CONNECTS COMPANIES, NON-PROFITS AND INDIVIDUALS IN ONE NETWORK. ALL ORGANIZATIONAL AND INDIVIDUAL USERS ARE ASSIGNED THEIR OWN SHAREABLE PROFILE THAT CAPTURES THEIR PHILANTHROPIC ACTIVITY. ALL FUNCTIONALITY IS EASY TO DEPLOY WITH WELL-ORGANIZED AND INTUITIVE ADMINISTRATOR TOOLS, INCLUDING PRE-BUILT 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 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. In-demand features such as payroll giving and business system integration APIs are on the development roadmap for 2019 and early 2020, respectively.

DEEP DIVE ① FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING		GRANTS	
Volunteer opportunity & event search	Team volunteering PTO	Nonprofit database	Fundraising pages	Applicant database	Recognition and reward
Proprietary volunteer opportunity database	Dollars for Doers bank	Nonprofit profile overview	Funding status notifications	Grant eligibility	Direct payment
Active opportunities (proprietary)	Competitions	Nonprofit partner request	Giving profile	Forms	Checks and EFT deposits
Real-time database (proprietary)	Volunteer communities	Nonprofit search	Recognition & reward	Metadata	Dashboards
Volunteer opportunity database integration	Volunteer profile	Nonprofit access	Check and EFT deposits	Grant application templates	Data & exports
Pushed volunteer recommendations	Recognition and reward	Company foundation	Direct payment	Collaboration	Real-time reporting
Volunteer opportunity creation	Volunteer time	In-kind donations	Fees	Grant evaluation	Workflows
Nonprofit partner request	Post-event surveys	Gift cards	Disbursement cadence	Applicant vetting	
Basic event creation & management	Dashboards	Payroll deductions	Payment options	Applicant de-duplication	
Complex event creation & management	Data & exports	International giving & matching	Admin self-service	Review and approval workflow	
Disaster relief	Real-time reporting	Disaster relief (external)	Dashboards	Approval thresholds	

VOLUNTEERING		GIVING		GRANTS	
● Nonprofit access	🕒 Mapping to UN SDGs	🕒 Disaster relief (internal)	● Data & exports	🕒 Grants agreement templates	
● Volunteer event types	🕒 Workflows	🕒 Automatic matches	🕒 Future forecasting	● Grant disbursement	
● Self-reporting		● Match optimization	● Real-time reporting	🕒 Volunteer grants	
🕒 Hours administration		● Thresholds	🕒 Tax information	● Status notifications	
🕒 Nonprofit hours validation		● Processing & distribution	🕒 Mapping to UN SDGs	● Email records	
● Individual volunteering PTO		● Vetting	● Workflows	● Nonprofit access	

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS			INCLUDES...
Communications (Internal)	One-Way	Two-Way	
Communications (External)	One-Way	Two-Way	
Sharing (Internal)	Available	Unavailable	Photo sharing, posts
Sharing (External)	Available	Unavailable	Social media sharing

USABILITY						
Access	URL	Mobile-Friendly	SSO	Username & Password		
Automation	Workflows	Notifications	Form Auto-Population			
Error Identification	Rules & Alerts	Field Completion	Format Validation	Submission Warnings & Blocks		Native Error Support
Look & Feel	Logo	Colors	Layout	Social Media Tags	Localizations	White Label
*UI refresh on 2020 roadmap						
Search	Keyword	Event/Opportunity	Nonprofit/Association			

ARCHITECTURE					
Compatibility	Windows (Browser)	Mac OS (Browser)	Linux (Browser)	Android (Browser)	iOS (Browser)
Deployment	On-Premise	Cloud (SaaS) (Single-Tenant, Multi-Tenant)			Hybrid
Global	Single Entity	Multi-Site	Multi-Country	Global	
Integration	Out-of-the-box APIs	Custom Integration			

SECURITY				
GDPR	Compliant	Non-Compliant		
Permissions	Owner	Admin	Editor	Viewer

3 VENDOR SUPPORT

Exception Management	On-Screen Alerts	On-Screen Explanations	Self-Service Fixes	Integrated Help Options		
Implementation Time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
Platform 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	
	*Additional languages on 2020 roadmap					

SLA	Priority-Based	Single Option	Audience-based: Biz Admins (1-hour response); Employees (2-hour response); Nonprofits (same-day response)			
Support Centres	2 support centres					
Support Centre Locations	USA, India					
Support Levels	Client Admin	User	External			
Support Methods	Phone (Toll)	Phone (Toll-Free)	Online (Forum)	Online (Live Chat)	Online (Ticket System)	Online (Email)
	Knowledge Base					
Training Methods	Online (Synchronous)	Online (Self-paced)	Online (Forums)	Classroom (Onsite)	Classroom (Offsite)	Third Party

GOZAROUND

VENDOR NAME

GozAround

HQ

Edmonton, AB, Canada

FOUNDED

2014

EMPLOYEES

1-10

CLIENT BASE

4 corporations

ORG MARKET

Mid-sized

R&D INVESTMENT

\$100,000

FEE STRUCTURE

Annual subscription (volume-based) + transaction fees

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.

The modern and intuitive 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 in order 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. The 6-12 month development roadmap includes in-demand features, such as employee payroll giving.

DEEP DIVE ① FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING		GRANTS	
Volunteer opportunity & event search	Team volunteering PTO	Nonprofit database	Fundraising pages	Applicant database	Recognition and reward
Proprietary volunteer opportunity database	Dollars for Doers bank	Nonprofit profile overview	Funding status notifications	Grant eligibility	Direct payment
Active opportunities (proprietary)	Competitions	Nonprofit partner request	Giving profile	Forms	Checks and EFT deposits
Real-time database (proprietary)	Volunteer communities	Nonprofit search	Recognition & reward	Metadata	Dashboards
Volunteer opportunity database integration	Volunteer profile	Nonprofit access	Check and EFT deposits	Grant application templates	Data & exports
Pushed volunteer recommendations	Recognition and reward	Company foundation	Direct payment	Collaboration	Real-time reporting
Volunteer opportunity creation	Volunteer time	In-kind donations	Fees	Grant evaluation	Workflows
Nonprofit partner request	Post-event surveys	Gift cards	Disbursement cadence	Applicant vetting	
Basic event creation & management	Dashboards	Payroll deductions*	Payment options	Applicant de-duplication	
Complex event creation & management	Data & exports	International giving & matching	Admin self-service	Review and approval workflow	
Disaster relief	Real-time reporting	Disaster relief (external)	Dashboards	Approval thresholds	

VOLUNTEERING		GIVING		GRANTS	
<input checked="" type="checkbox"/> Nonprofit access	<input type="checkbox"/> Mapping to UN SDGs	<input type="checkbox"/> Disaster relief (internal)	<input checked="" type="checkbox"/> Data & exports	<input type="checkbox"/> Grants agreement templates	
<input checked="" type="checkbox"/> Volunteer event types	<input type="checkbox"/> Workflows	<input checked="" type="checkbox"/> Automatic matches	<input type="checkbox"/> Future forecasting	<input checked="" type="checkbox"/> Grant disbursement	
<input checked="" type="checkbox"/> Self-reporting		<input type="checkbox"/> Match optimization	<input checked="" type="checkbox"/> Real-time reporting	<input checked="" type="checkbox"/> Volunteer grants	
<input checked="" type="checkbox"/> Hours administration		<input checked="" type="checkbox"/> Thresholds	<input checked="" type="checkbox"/> Tax information	<input type="checkbox"/> Status notifications	
<input checked="" type="checkbox"/> Nonprofit hours validation		<input checked="" type="checkbox"/> Processing & distribution	<input type="checkbox"/> Mapping to UN SDGs	<input type="checkbox"/> Email records	
<input checked="" type="checkbox"/> Individual volunteering PTO		<input checked="" type="checkbox"/> Vetting	<input checked="" type="checkbox"/> Workflows	<input checked="" type="checkbox"/> Nonprofit access	

2 TECHNOLOGY SPECIFICATIONS

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

USABILITY						
Access	URL	Mobile-Friendly	SSO	Username & Password		
Automation	Workflows	Notifications	Form Auto-Population			
Error Identification	Rules & Alerts	Field Completion	Format Validation	Submission Warnings & 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)	Mac OS (Browser)	Linux	Android (App)	iOS (App)
Deployment	On-Premise	Cloud (SaaS) (Single-Tenant, Multi-Tenant)	Hybrid		
Global	Single Entity	Multi-Site	Multi-Country	Global	
Integration	Out-of-the-box APIs	Custom Integration			

SECURITY				
GDPR	Compliant	Non-Compliant		
Permissions	Owner	Admin	Editor	Viewer

3 VENDOR SUPPORT

Exception Management	On-Screen Alerts	On-Screen Explanations	Self-Service Fixes	Integrated Help Options		
Implementation Time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
Platform 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	1-hour response time			
Support Centres	1 support centre					
Support Centre Locations	Edmonton, AB, Canada					
Support Levels	Client Admin	User	External			
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

*Custom onboarding and training per client

SMARTSIMPLE

VENDOR NAME

SmartSimple

HQ

Toronto, ON, Canada

FOUNDED

2002

EMPLOYEES

51-200

CLIENT BASE

350+ organizations

ORG MARKET

Mid-sized, Large/
Enterprise

R&D INVESTMENT

\$1.27M

FEE STRUCTURE

SMARTSIMPLE PROVIDES A UNIFIED DATABASE TO INTEGRATE, AGGREGATE, AND ANALYZE DATA ACROSS ALL PHILANTHROPIC EFFORTS. SMARTSIMPLE HARNESSES 17 YEARS OF MANAGEMENT SOFTWARE EXPERIENCE TO PERSONALIZE THE CONFIGURATION OF THE PLATFORM TO EACH CLIENT'S UNIQUE BUSINESS PROCESSES.

SmartSimple has embraced the United Nations Sustainable Development Goals and offer an instance of the platform to clients who are incorporating these into their philanthropic programs. Employee engagement tools are offered via event storyboarding, badging and gamification features.

Platform strengths lie in the high level of configurability, inbuilt reporting functionality, ability to provision integrations into multiple external business systems. Further, SmartSimple has standout reporting features, including the use of geolocation to visually present impact captured within the platform.

SmartSimple's Grant Management module is exceptional due to its 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.

DEEP DIVE ① FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING		GRANTS	
● Volunteer opportunity & event search	○ Team volunteering PTO	● Nonprofit database	○ Fundraising pages	● Applicant database	○ Recognition and reward
○ Proprietary volunteer opportunity database	● Dollars for Doers bank	● Nonprofit profile overview	○ Funding status notifications	○ Grant eligibility	○ Direct payment
Active opportunities (proprietary)	○ Competitions	● Nonprofit partner request	○ Giving profile	● Forms	● Checks and EFT deposits
Real-time database (proprietary)	○ Volunteer communities	● Nonprofit search	○ Recognition & reward	● Metadata	● Dashboards
● Volunteer opportunity database integration	○ Volunteer profile	○ Nonprofit access	● Check and EFT deposits	● Grant application templates	● Data & exports
○ Pushed volunteer recommendations	○ Recognition and reward	○ Company foundation	● Direct payment	● Collaboration	● Real-time reporting
○ Volunteer opportunity creation	● Volunteer time	● In-kind donations	● Fees	● Grant evaluation	● Workflows
● Nonprofit partner request	● Post-event surveys	○ Gift cards	● Disbursement cadence	● Applicant vetting	
● Basic event creation & management	● Dashboards	● Payroll deductions	● Payment options	● Applicant de-duplication	
○ Complex event creation & management	● Data & exports	○ International giving & matching	○ Admin self-service	● Review and approval workflow	
○ Disaster relief	● Real-time reporting	○ Disaster relief (external)	● Dashboards	● Approval thresholds	
○ Nonprofit access	● Mapping to UN SDGs	○ Disaster relief (internal)	● Data & exports	● Grants agreement templates	

VOLUNTEERING		GIVING		GRANTS	
Volunteer event types	Workflows	Automatic matches	Future forecasting	Grant disbursement	
Self-reporting		Match optimization	Real-time reporting	Volunteer grants	
Hours administration		Thresholds	Tax information	Status notifications	
Nonprofit hours validation		Processing & distribution	Mapping to UN SDGs	Email records	
Individual volunteering PTO		Vetting	Workflows	Nonprofit access	

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS			INCLUDES...
Communications (Internal)	One-Way	Two-Way	Configurable "Notes" functionality, email notifications
Communications (External)	One-Way	Two-Way	Email, email broadcasts, direct messages, pin boards, "Email Anything" communication capture
Sharing (Internal)	Available	Unavailable	Image and other data sharing
Sharing (External)	Available	Unavailable	Social media integrations (Twitter, Facebook, LinkedIn)

USABILITY					
Access	URL	Mobile-Friendly	SSO	Username & Password	
Automation	Workflows	Notifications	Form Auto-Population		
Error Identification	Rules & Alerts	Field Completion	Format Validation	Submission Warnings & Blocks	Native Error Support
Look & Feel	Logo	Colors	Layout	Social Media Tags	Localizations
Search	Keyword	Event/Opportunity	Nonprofit/Association		

ARCHITECTURE						
Compatibility	Windows (Browser)	Mac OS (Browser)	Linux (Browser)	Android (App)	iOS (App)	
Deployment	On-Premise	Cloud (SaaS) (Single-Tenant, Multi-Tenant)		Hybrid		
Global	Single Entity	Multi-Site	Multi-Country	Global		
Integration	Out-of-the-box APIs	Custom Integration				

SECURITY					
GDPR	Compliant	Non-Compliant			
Permissions	Owner	Admin	Editor	Viewer	Unlimited custom client-defined roles

3 VENDOR SUPPORT

Exception Management	On-Screen Alerts	On-Screen Explanations	Self-Service Fixes	Integrated Help Options		
Implementation Time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
Platform 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)			
Support Centres	2 support centres					
Support Centre Locations	Toronto, Canada; Dublin, Ireland					
Support Levels	Client Admin	User	External			
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

WESPIRE

VENDOR NAME

WeSpire

HQ

Boston, MA, USA

FOUNDED

2010

EMPLOYEES

11-50

CLIENT BASE

30 corporations

ORG MARKET

Large/Enterprise

R&D INVESTMENT

\$1M

FEE STRUCTURE

Annual subscription (volume-based)

WESPIRE IS AN EMPLOYEE ENGAGEMENT PLATFORM THAT USES GAMIFICATION AND BEHAVIORAL SCIENCE TO INSPIRE POSITIVE ACTION.

The platform aims to engage employees in habitual acts that drive personal and work-related outcomes both at work and at home. Engagement modules cover sustainability, positive culture, DE&I, social impact, giving, financial skills, personal wellbeing, and UN global goals.

The platform provides administrators with reporting dashboards and a library of 300+ pre-built campaigns 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 campaigns.

WeSpire works with clients globally to achieve positive business, personal and social impact engagement programs. To ensure clients are getting the most out of their platform, WeSpire provides high-touch service through dedicated client success teams.

DEEP DIVE ① FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING		GRANTS	
Volunteer opportunity & event search	Team volunteering PTO	Nonprofit database	Fundraising pages	Applicant database	Recognition and reward
Proprietary volunteer opportunity database	Dollars for Doers bank	Nonprofit profile overview	Funding status notifications	Grant eligibility	Direct payment
Active opportunities (proprietary)	Competitions	Nonprofit partner request	Giving profile	Forms	Checks and EFT deposits
Real-time database (proprietary)	Volunteer communities	Nonprofit search	Recognition & reward	Metadata	Dashboards
Volunteer opportunity database integration	Volunteer profile	Nonprofit access	Check and EFT deposits	Grant application templates	Data & exports
Pushed volunteer recommendations	Recognition and reward	Company foundation	Direct payment	Collaboration	Real-time reporting
Volunteer opportunity creation	Volunteer time	In-kind donations	Fees	Grant evaluation	Workflows
Nonprofit partner request	Post-event surveys	Gift cards	Disbursement cadence	Applicant vetting	
Basic event creation & management	Dashboards	Payroll deductions	Payment options	Applicant de-duplication	
Complex event creation & management	Data & exports	International giving & matching	Admin self-service	Review and approval workflow	
Disaster relief	Real-time reporting	Disaster relief (external)	Dashboards	Approval thresholds	

VOLUNTEERING		GIVING		GRANTS	
Nonprofit access	Mapping to UN SDGs	Disaster relief (internal)	Data & exports	Grants agreement templates	
Volunteer event types	Workflows	Automatic matches	Future forecasting	Grant disbursement	
Self-reporting		Match optimization	Real-time reporting	Volunteer grants	
Hours administration		Thresholds	Tax information	Status notifications	
Nonprofit hours validation		Processing & distribution	Mapping to UN SDGs	Email records	
Individual volunteering PTO		Vetting	Workflows	Nonprofit access	

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

	One-Way	Two-Way	INCLUDES...
Communications (Internal)	One-Way	Two-Way	Comments, voting, likes, Yammer, Slack, alerts, notifications, newsletters
Communications (External)	One-Way	Two-Way	Broadcasts, announcements, direct messaging, notifications
Sharing (Internal)	Available	Unavailable	Posts (activity, photos, tags)
Sharing (External)	Available	Unavailable	Social media sharing (Twitter, Facebook)

USABILITY

Access	URL	Mobile-Friendly	SSO	Username & Password		
Automation	Workflows	Notifications	Form Auto-Population			
Error Identification	Rules & Alerts	Field Completion	Format Validation	Submission Warnings & 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)	Mac OS (Browser)	Linux (Browser)	Android (Browser)	iOS (Browser)
Deployment	On-Premise	Cloud (SaaS) (Multi-Tenant)		Hybrid	
Global	Single Entity	Multi-Site	Multi-Country	Global	
Integration	Out-of-the-box APIs	Custom Integration	Social API (Yammer, Slack, Jive, SharePoint, etc.)		

SECURITY

GDPR	Compliant	Non-Compliant			
Permissions	Owner	Admin	Editor	Viewer	

3 VENDOR SUPPORT

Exception Management	On-Screen Alerts	On-Screen Explanations	Self-Service Fixes	Integrated Help Options			
Implementation Time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months	
Platform 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				
	Support Centres	1 support centre					
Support Centre Locations	Boston, MA, USA						
Support Levels	Client Admin	User	External				
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	

YOURCAUSE + BLACKBAUD

VENDOR NAME

CSRconnect; GrantsConnect; Blackbaud Grantmaking

HQ

Charleston, SC, USA

FOUNDED

1982 / 2008

EMPLOYEES

1,001-5,000

CLIENT BASE

Declined to disclose

ORG MARKET

All

R&D INVESTMENT

Declined to disclose

FEE STRUCTURE

Annual subscription (per module, volume-based); + flat transaction fee + add-ons

THE 2019 ACQUISITION OF YOURCAUSE BY BLACKBAUD HAS RESULTED IN AN INTEGRATED GLOBAL GOOD NETWORK OF VOLUNTEERING AND GIVING (CSRCONNECT), GRANTMAKING (GRANTSCONNECT, BLACKBAUD GRANTMAKING) AND NONPROFIT PORTAL (NPOCONNECT) FUNCTIONALITY; THE SECURITY, INNOVATION, AND INTUITIVE CAPABILITIES OF YOURCAUSE IN COMBINATION WITH BLACKBAUD'S NETWORK OF PARTNERSHIPS OFFERS A ROBUST INTERNATIONAL PRODUCT, DOWN TO COUNTRY-LEVEL TAX RECEIPTING AND FUNDS DISTRIBUTION.

The integrated user experience is centered around a dashboard that highlights featured engagement elements, guiding employees to opportunities they care about most. The user dashboard can be easily tailored from a library of 300+ pre-built options. Going beyond

typical CSR functionality, social tools cater to Employee Resource Groups in the creation of employee engagement communities.

A high degree of access configurability gives administrators full reign in tailoring the platform to their programs. Reporting is enabled by native tools, data feeds to empower client-side analytics, and/or integration with business intelligence tools such as Tableau. Administrators can customize data capture with tags, including UN Sustainable Development Goals indicators. Advanced reporting capabilities provide detailed insight on employee engagement, program trends, nonprofit engagement and campaigns.

GrantsConnect and Blackbaud Grantmaking offer similar functionality but each are capable of serving unique needs depending on the complexity of grantmaking and sponsorship programs.

DEEP DIVE ① FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING		GRANTS*	
● Volunteer opportunity & event search	● Team volunteering PTO	● Nonprofit database	● Fundraising pages	● ● Applicant database	● ● Recognition and reward
● Proprietary volunteer opportunity database	● Dollars for Doers bank	● Nonprofit profile overview	● Funding status notifications	● ● Grant eligibility	● ● Direct payment
● Active opportunities (proprietary)	● Competitions	● Nonprofit partner request	● Giving profile	● ● Forms	● ● Checks and EFT deposits
● Real-time database (proprietary)	● Volunteer communities	● Nonprofit search	● Recognition & reward	● ● Metadata	● ● Dashboards
● Volunteer opportunity database integration	● Volunteer profile	● Nonprofit access	● Check and EFT deposits	● ● Grant application templates	● ● Data & exports
● Pushed volunteer recommendations	● Recognition and reward	○ Company foundation	● Direct payment	● ● Collaboration	● ● Real-time reporting
● Volunteer opportunity creation	● Volunteer time	● In-kind donations	● Fees	● ● Grant evaluation	● ● Workflows
● Nonprofit partner request	● Post-event surveys	● Gift cards	● Disbursement cadence	● ● Applicant vetting	
● Basic event creation & management	● Dashboards	● Payroll deductions	● Payment options	● ● Applicant de-duplication	
● Complex event creation & management	● Data & exports	● International giving & matching	● Admin self-service	● ● Review and approval workflow	

*This table is unique in that the Grantmaking column contains two rating columns for two different products. The first column under Grantmaking represents information on Blackbaud Grantmaking; the second on GrantsConnect.

VOLUNTEERING		GIVING		GRANTS*	
● Disaster relief	● Real-time reporting	● Disaster relief (external)	● Dashboards	● ● Approval thresholds	
● Nonprofit access	● Mapping to UN SDGs	● Disaster relief (internal)	● Data & exports	● ● Grants agreement templates	
● Volunteer event types	● Workflows	● Automatic matches	● Future forecasting	● ● Grant disbursement	
● Self-reporting		● Match optimization	● Real-time reporting	● ● Volunteer grants	
● Hours administration		● Thresholds	● Tax information	● ● Status notifications	
● Nonprofit hours validation		● Processing & distribution	● Mapping to UN SDGs	● ● Email records	
● Individual volunteering PTO		● Vetting	● Workflows	● ● Nonprofit access	

*This table is unique in that the Grantmaking column contains two rating columns for two different products. The first column under Grantmaking represents information on Blackbaud Grantmaking; the second on GrantsConnect.

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS			INCLUDES...
Communications (Internal)	One-Way	Two-Way	Direct messaging (user-user, admin-user), notifications
Communications (External)	One-Way	Two-Way	
Sharing (Internal)	Available	Unavailable	Photos, stories, feedback, evaluation
Sharing (External)	Available	Unavailable	Social media sharing (Twitter, Facebook, LinkedIn)

USABILITY						
Access	URL	Mobile-Friendly	SSO	Username & Password		
Automation	Workflows	Notifications	Form Auto-Population			
Error Identification	Rules & Alerts	Field Completion	Format Validation	Submission Warnings & Blocks		Native Error Support
Look & Feel	Logo	Colors	Layout	Social Media Tags	Localizations	White Label
Search	Keyword	Event/Opportunity	Nonprofit/Association			

ARCHITECTURE					
Compatibility	Windows (App, Browser)	Mac OS (App, Browser)	Linux (App, Browser)	Android (App)	iOS (App)
Deployment	On-Premise	Cloud (SaaS) (Multi-Tenant)		Hybrid	
Global	Single Entity	Multi-Site	Multi-Country	Global	
Integration	Out-of-the-box APIs	Custom Integration			

SECURITY				
GDPR	Compliant	Non-Compliant		
Permissions	Owner	Admin	Editor	Viewer

3 VENDOR SUPPORT

Exception Management	On-Screen Alerts	On-Screen Explanations	Self-Service Fixes	Integrated Help Options		
Implementation Time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
Platform 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	*GrantsConnect only
SLA	Priority-Based	Single Option	8-hour response time, 1-day resolution (business hours/day)			
Support Centres	9 support centres					
Support Centre Locations	TX, CA, FL, NY and SC, USA; Australia, UK, Costa Rica					
Support Levels	Client Admin	User	External			
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

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 **5 SOLUTIONS**:

-
- Alaya
 - Aplanet
 - Goodup
 - Philanthropy Cloud (Salesforce)
 - StratusLIVE

ALAYA

VENDOR NAME

Alaya

HQ

Vaud, Switzerland

FOUNDED

2018

EMPLOYEES

11-50

CLIENT BASE

30 corporations

ORG MARKET

Mid-sized

R&D INVESTMENT

\$400K

FEE STRUCTURE

Annual subscription
(volume-based)

ALAYA FOCUSES ON CREATING A BOTTOM-UP EXPERIENCE WHICH ENCOURAGES EMPLOYEES TO COMPLETE SOCIAL ACTIONS THROUGH OPPORTUNITIES PRESENTED AS **ACTIVITY CARDS** OR **MISSIONS**.

The end user experience is an appealing visual layout and activity feed with a social-network dimension. The platform includes gamification features with individual and team leaderboards, and a virtual currency, called **Hopeys**, for rewarding social actions.

Activities are clearly distinguished between traditional- and skills-based volunteering, and monetary or in-kind donations. The platform also allows employees to launch fundraisers

with peer-to-peer functionality, allowing friends and family to contribute as supporters to a campaign.

Alaya vets all opportunities and nonprofits on the platform and allows employees and administrators to nominate organizations for vetting. The platform is European-focused, but also includes opportunities from global nonprofit partners.

As a young platform, the Alaya feature set is still growing and aims to address challenges of employee engagement. With the European market focus, some of the traditional requirements typical of North American organizations are not currently supported.

DEEP DIVE ① FEATURES & FUNCTIONALITY

VOLUNTEERING	
<input checked="" type="checkbox"/> Volunteer opportunity & event search	<input checked="" type="checkbox"/> Team volunteering PTO
<input checked="" type="checkbox"/> Proprietary volunteer opportunity database	<input checked="" type="checkbox"/> Dollars for Doers bank
<input checked="" type="checkbox"/> Active opportunities (proprietary)	<input checked="" type="checkbox"/> Competitions
<input checked="" type="checkbox"/> Real-time database (proprietary)	<input checked="" type="checkbox"/> Volunteer communities
<input checked="" type="checkbox"/> Volunteer opportunity database integration	<input checked="" type="checkbox"/> Volunteer profile
<input checked="" type="checkbox"/> Pushed volunteer recommendations	<input checked="" type="checkbox"/> Recognition and reward
<input checked="" type="checkbox"/> Volunteer opportunity creation	<input checked="" type="checkbox"/> Volunteer time
<input checked="" type="checkbox"/> Nonprofit partner request	<input checked="" type="checkbox"/> Post-event surveys
<input checked="" type="checkbox"/> Basic event creation & management	<input checked="" type="checkbox"/> Dashboards
<input checked="" type="checkbox"/> Complex event creation & management	<input checked="" type="checkbox"/> Data & exports
<input checked="" type="checkbox"/> Disaster relief	<input checked="" type="checkbox"/> Real-time reporting
<input checked="" type="checkbox"/> Nonprofit access	<input checked="" type="checkbox"/> Mapping to UN SDGs

GIVING	
<input checked="" type="checkbox"/> Nonprofit database	<input checked="" type="checkbox"/> Fundraising pages
<input checked="" type="checkbox"/> Nonprofit profile overview	<input checked="" type="checkbox"/> Funding status notifications
<input checked="" type="checkbox"/> Nonprofit partner request	<input checked="" type="checkbox"/> Giving profile
<input checked="" type="checkbox"/> Nonprofit search	<input checked="" type="checkbox"/> Recognition & reward
<input checked="" type="checkbox"/> Nonprofit access	<input type="checkbox"/> Check and EFT deposits
<input checked="" type="checkbox"/> Company foundation	<input checked="" type="checkbox"/> Direct payment
<input checked="" type="checkbox"/> In-kind donations	<input checked="" type="checkbox"/> Fees
<input type="checkbox"/> Gift cards	<input checked="" type="checkbox"/> Disbursement cadence
<input checked="" type="checkbox"/> Payroll deductions	<input checked="" type="checkbox"/> Payment options
<input checked="" type="checkbox"/> International giving & matching	<input checked="" type="checkbox"/> Admin self-service
<input checked="" type="checkbox"/> Disaster relief (external)	<input checked="" type="checkbox"/> Dashboards
<input type="checkbox"/> Disaster relief (internal)	<input checked="" type="checkbox"/> Data & exports

VOLUNTEERING

<input checked="" type="checkbox"/> Volunteer event types	<input checked="" type="checkbox"/> Workflows
<input checked="" type="checkbox"/> Self-reporting	
<input checked="" type="checkbox"/> Hours administration	
<input type="checkbox"/> Nonprofit hours validation	
<input checked="" type="checkbox"/> Individual volunteering PTO	

GIVING

<input type="checkbox"/> Automatic matches	<input checked="" type="checkbox"/> Future forecasting
<input checked="" type="checkbox"/> Match optimization	<input checked="" type="checkbox"/> Real-time reporting
<input checked="" type="checkbox"/> Thresholds	<input checked="" type="checkbox"/> Tax information
<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	INCLUDES... Likes, invitations
Communications (External)	One-Way	Two-Way	Requests
Sharing (Internal)	Available	Unavailable	
Sharing (External)	Available	Unavailable	Fundraising pages

USABILITY

Access	URL	Mobile-Friendly (Browser)	SSO	Username & Password
Automation	Workflows	Notifications	Form Auto-Population	
Error Identification	Rules & Alerts	Field Completion	Format Validation	Submission Warnings & Blocks Native Error Support
	*Customized based on company workflow			
Look & Feel	Logo	Colors	Layout	Social Media Tags Localizations White Label
Search	Keyword	Event/Opportunity	Nonprofit/Association	

ARCHITECTURE

Compatibility	Windows (Browser)	Mac OS (Browser)	Linux (Browser)	Android (Browser)	iOS (Browser)
Deployment	On-Premise	Cloud (SaaS) (Single-Tenant, Multi-Tenant)		Hybrid	
Global	Single Entity	Multi-Site	Multi-Country	Global	
Integration	Out-of-the-box APIs	Custom Integration			

SECURITY

GDPR	Compliant	Non-Compliant		
Permissions	Owner (Alaya Admin)	Admin (Supervisor)	Editor	Viewer (End User)

3 VENDOR SUPPORT

Exception Management	On-Screen Alerts	On-Screen Explanations	Self-Service Fixes	Integrated Help Options	
Implementation Time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months 24+ Months
Platform 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 hours, 48 hours, as possible		
Support Centres	2 support centres				
Support Centre Locations	Switzerland				
Support Levels	Client Admin	User	External (NPOs)		
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

APLANET COMMUNITY

VENDOR NAME

Aplanet

HQ

Biscay, Spain

FOUNDED

2019

EMPLOYEES

11-50

CLIENT BASE

15 corporations

ORG MARKET

All

R&D INVESTMENT

Declined to disclose

FEE STRUCTURE

Declined to disclose

APLANET COMMUNITY IS A CLOUD-BASED PLATFORM AND MOBILE APP FOR LAUNCHING SOCIAL AND VOLUNTEERING INITIATIVES. ALL INITIATIVES ARE MAPPED TO THE UN SUSTAINABLE DEVELOPMENT GOALS, WHICH IS USED TO MEASURE AND REPORT ON COMMUNITY IMPACT.

Initiatives can be organization- or community-wide, allowing for the option of friends, family or peers of the organization to participate in events.

Mobile one-tap registration makes signing up for initiatives easy for employees and the community. Through individual profiles, employees can log volunteering hours directly or via QR codes validated by administrators or nonprofits. The platform generates a **social CV** for the employee that records causes they care about and tracks individual impact.

Administrators can launch organization-specific initiatives or import opportunities from nonprofit partners. Aplanet Community provides administrators with data-driven reporting and program management capabilities. A detailed dashboard displays feedback about each initiative, organizer, volunteer, and tracks **skills acquired** by employees through initiatives. Unique to Aplanet are the robust organizational collaboration tools, opening the door to broader community impact.

The platform is currently available in Spain, Brazil, Mexico, Portugal and USA, and serves all types of organizations, including corporations, education and government institutions. Aplanet's short-term roadmap includes the development of in-demand **dollars for doers** functionality, among other features.

DEEP DIVE ① FEATURES & FUNCTIONALITY

VOLUNTEERING		GIVING	
<input checked="" type="checkbox"/> Volunteer opportunity & event search	<input checked="" type="checkbox"/> Team volunteering PTO	<input checked="" type="checkbox"/> Nonprofit database	<input checked="" type="checkbox"/> Fundraising pages
<input checked="" type="checkbox"/> Proprietary volunteer opportunity database	<input checked="" type="checkbox"/> Dollars for Doers bank	<input checked="" type="checkbox"/> Nonprofit profile overview	<input checked="" type="checkbox"/> Funding status notifications
<input checked="" type="checkbox"/> Active opportunities (proprietary)	<input checked="" type="checkbox"/> Competitions	<input checked="" type="checkbox"/> Nonprofit partner request	<input checked="" type="checkbox"/> Giving profile
<input checked="" type="checkbox"/> Real-time database (proprietary)	<input checked="" type="checkbox"/> Volunteer communities	<input type="checkbox"/> Nonprofit search	<input checked="" type="checkbox"/> Recognition & reward
<input checked="" type="checkbox"/> Volunteer opportunity database integration	<input checked="" type="checkbox"/> Volunteer profile	<input checked="" type="checkbox"/> Nonprofit access	<input type="checkbox"/> Check and EFT deposits
<input checked="" type="checkbox"/> Pushed volunteer recommendations	<input checked="" type="checkbox"/> Recognition and reward	<input checked="" type="checkbox"/> Company foundation	<input checked="" type="checkbox"/> Direct payment
<input checked="" type="checkbox"/> Volunteer opportunity creation	<input checked="" type="checkbox"/> Volunteer time	<input checked="" type="checkbox"/> In-kind donations	<input type="checkbox"/> Fees
<input checked="" type="checkbox"/> Nonprofit partner request	<input checked="" type="checkbox"/> Post-event surveys	<input type="checkbox"/> Gift cards	<input type="checkbox"/> Disbursement cadence
<input checked="" type="checkbox"/> Basic event creation & management	<input checked="" type="checkbox"/> Dashboards	<input type="checkbox"/> Payroll deductions	<input checked="" type="checkbox"/> Payment options
<input checked="" type="checkbox"/> Complex event creation & management	<input checked="" type="checkbox"/> Data & exports	<input checked="" type="checkbox"/> International giving & matching	<input type="checkbox"/> Admin self-service
<input checked="" type="checkbox"/> Disaster relief	<input checked="" type="checkbox"/> Real-time reporting	<input checked="" type="checkbox"/> Disaster relief (external)	<input type="checkbox"/> Dashboards
<input checked="" type="checkbox"/> Nonprofit access	<input checked="" type="checkbox"/> Mapping to UN SDGs	<input checked="" type="checkbox"/> Disaster relief (internal)	<input type="checkbox"/> Data & exports

VOLUNTEERING

<input checked="" type="checkbox"/> Volunteer event types	<input checked="" type="checkbox"/> Workflows
<input checked="" type="checkbox"/> Self-reporting	
<input checked="" type="checkbox"/> Hours administration	
<input checked="" type="checkbox"/> Nonprofit hours validation	
<input checked="" type="checkbox"/> Individual volunteering PTO	

GIVING

<input type="checkbox"/> Automatic matches	<input type="checkbox"/> Future forecasting
<input type="checkbox"/> Match optimization	<input type="checkbox"/> Real-time reporting
<input type="checkbox"/> Thresholds	<input type="checkbox"/> Tax information
<input type="checkbox"/> Processing & distribution	<input checked="" type="checkbox"/> Mapping to UN SDGs
<input type="checkbox"/> Vetting	<input type="checkbox"/> Workflows

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-Way	Two-Way	<i>INCLUDES...</i> Broadcast via email, SMS, mobile push notifications (admin-user)
Communications (External)	One-Way	Two-Way	Broadcast via email, SMS, mobile push notifications (admin-volunteer (non-employee))
Sharing (Internal)	Available	Unavailable	
Sharing (External)	Available	Unavailable	Social media sharing

USABILITY

Access	URL	Mobile-Friendly	SSO	Username & Password		
Automation	Workflows	Notifications	Form Auto-Population			
Error Identification	Rules & Alerts	Field Completion	Format Validation	Submission Warnings & 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)	Mac OS (Browser)	Linux (Browser)	Android (Browser)	iOS (Browser)
Deployment	On-Premise	Cloud (SaaS) (Multi-Tenant)		Hybrid	
Global	Single Entity	Multi-Site	Multi-Country	Global	
Integration	Out-of-the-box APIs	Custom Integration	HTTP REST API, Geo-location API, SparkPost, Esendex, Inspectlet, Hotjar, Google Analytics, Digital Ocean		

SECURITY

GDPR	Compliant	Non-Compliant			
Permissions	Owner (System Admin)	Admin (Full Admin)	Editor (Restricted Admin)	Viewer (User)	

3 VENDOR SUPPORT

Exception Management	On-Screen Alerts	On-Screen Explanations	Self-Service Fixes	Integrated Help Options		
Implementation Time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
Platform 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				
Support Centres	4 support centres					
Support Centre Locations	Spain, Portugal, Mexico, Brazil					
Support Levels	Client Admin	User	External			
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

GOODUP

VENDOR NAME

GoodUp

HQ

Amsterdam, Netherlands

FOUNDED

2017

EMPLOYEES

11-50

CLIENT BASE

43 corporations

ORG MARKET

Large/Enterprise

R&D INVESTMENT

\$745K

FEE STRUCTURE

One-time setup fee
+ monthly SaaS fee +
monthly activation fee
(volume-based)

GOODUP IS A SOCIAL ENTERPRISE WITH THE GOAL OF ENGAGING ONE BILLION PEOPLE TO **DO GOOD** BY 2030. THEIR IMPACT MARKETPLACE IS AIMED AT HARNESSING THE GRASSROOTS PASSION OF EMPLOYEES TO CREATE SOCIETAL IMPACT THROUGH PROJECT-BASED OPPORTUNITIES.

Projects are initiated by employees, the company, or impact partners (e.g. nonprofits, social enterprises) to crowd source time, skills or dollars towards a specified project outcome.

Initiatives are launched by employees, the company or impact partners (e.g. nonprofits, social enterprises) to crowdsource time, skills or money towards a specified project outcome. GoodUp believes this bottom-up experience is essential to creating meaningful employee engagement where empowered individuals can contribute how they want, to the causes they care

about, while also contributing to their Company's Purpose. Users are matched to opportunities through the Smart Matchmaking engine, which connects users and projects together based on their personal purpose (i.e. interests and skills).

The platform focus is on providing an ecosystem for impact and purpose-driven opportunities, internal and external to the client organization. Companies can decide to involve wider community participants in addition to internal employees. GoodUp offers strategic services on a continuous basis to ensure employees are activated & engaged, driving program success. Supply chain sustainability and diversity & inclusion are popular initiatives currently activated among GoodUp clients.

The GoodUp feature tool set is European market-focused and aims to move beyond traditional requirements typical of North American-based platforms.

DEEP DIVE ① FEATURES & FUNCTIONALITY

VOLUNTEERING	
<input checked="" type="checkbox"/> Volunteer opportunity & event search	<input type="checkbox"/> Team volunteering PTO
<input type="checkbox"/> Proprietary volunteer opportunity database	<input type="checkbox"/> Dollars for Doers bank
<input type="checkbox"/> Active opportunities (proprietary)	<input type="checkbox"/> Competitions
<input type="checkbox"/> Real-time database (proprietary)	<input type="checkbox"/> Volunteer communities
<input type="checkbox"/> Volunteer opportunity database integration	<input checked="" type="checkbox"/> Volunteer profile
<input checked="" type="checkbox"/> Pushed volunteer recommendations	<input type="checkbox"/> Recognition and reward
<input checked="" type="checkbox"/> Volunteer opportunity creation	<input checked="" type="checkbox"/> Volunteer time
<input checked="" type="checkbox"/> Nonprofit partner request	<input type="checkbox"/> Post-event surveys
<input checked="" type="checkbox"/> Basic event creation & management	<input checked="" type="checkbox"/> Dashboards
<input checked="" type="checkbox"/> Complex event creation & management	<input checked="" type="checkbox"/> Data & exports
<input checked="" type="checkbox"/> Disaster relief	<input checked="" type="checkbox"/> Real-time reporting

GIVING	
<input type="checkbox"/> Nonprofit database	<input type="checkbox"/> Fundraising pages
<input checked="" type="checkbox"/> Nonprofit profile overview	<input checked="" type="checkbox"/> Funding status notifications
<input type="checkbox"/> Nonprofit partner request	<input checked="" type="checkbox"/> Giving profile
<input type="checkbox"/> Nonprofit search	<input type="checkbox"/> Recognition & reward
<input type="checkbox"/> Nonprofit access	<input type="checkbox"/> Check and EFT deposits
<input type="checkbox"/> Company foundation	<input type="checkbox"/> Direct payment
<input type="checkbox"/> In-kind donations	<input checked="" type="checkbox"/> Fees
<input type="checkbox"/> Gift cards	<input checked="" type="checkbox"/> Disbursement cadence
<input type="checkbox"/> Payroll deductions	<input type="checkbox"/> Payment options
<input type="checkbox"/> International giving & matching	<input checked="" type="checkbox"/> Admin self-service
<input checked="" type="checkbox"/> Disaster relief (external)	<input checked="" type="checkbox"/> Dashboards

VOLUNTEERING

<input checked="" type="checkbox"/> Nonprofit access	<input checked="" type="checkbox"/> Mapping to UN SDGs
<input checked="" type="checkbox"/> Volunteer event types	<input checked="" type="checkbox"/> Workflows
<input checked="" type="checkbox"/> Self-reporting	
<input checked="" type="checkbox"/> Hours administration	
<input checked="" type="checkbox"/> Nonprofit hours validation	
<input type="checkbox"/> Individual volunteering PTO	

GIVING

<input type="checkbox"/> Disaster relief (internal)	<input checked="" type="checkbox"/> Data & exports
<input checked="" type="checkbox"/> Automatic matches	<input type="checkbox"/> Future forecasting
<input type="checkbox"/> Match optimization	<input checked="" type="checkbox"/> Real-time reporting
<input type="checkbox"/> Thresholds	<input type="checkbox"/> Tax information
<input type="checkbox"/> Processing & distribution	<input checked="" type="checkbox"/> Mapping to UN SDGs
<input type="checkbox"/> Vetting	<input type="checkbox"/> Workflows

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

	One-Way	Two-Way	INCLUDES...
Communications (Internal)			Project post walls, email notifications
Communications (External)			
Sharing (Internal)	Available	Unavailable	Event photo sharing
Sharing (External)	Available	Unavailable	Social media integrations

USABILITY

Access	URL	Mobile-Friendly	SSO	Username & Password	Facebook login, SAML login, SCIM
Automation	Workflows	Notifications	Form Auto-Population		
Error Identification	Rules & Alerts	Field Completion	Format Validation	Submission Warnings & Blocks	Native Error Support
Look & Feel	Logo	Colors	Layout	Social Media Tags	Localizations
Search	Keyword	Event/Opportunity	Nonprofit/Association		White Label

ARCHITECTURE

Compatibility	Windows (Browser)	Mac OS (Browser)	Linux (Browser)	Android (Browser)	iOS (Browser)
Deployment	On-Premise	Cloud (SaaS) (Multi-Tenant)		Hybrid	
Global	Single Entity	Multi-Site	Multi-Country	Global	
Integration	Out-of-the-box APIs	Custom Integration			

SECURITY

GDPR	Compliant	Non-Compliant			
Permissions	Owner (Client Admin)	Admin (Project Initiator)	Editor (Task Manager)	Viewer (End User)	Platform Visitor (no account)

3 VENDOR SUPPORT

Exception Management	On-Screen Alerts	On-Screen Explanations	Self-Service Fixes	Integrated Help Options		
Implementation Time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
Platform 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	Urgent (2 hours), High (4 hours), Normal (1 day)			
Support Centres	1 support centre					
Support Centre Locations	Amsterdam, Netherlands (External hosting parties: Linode (London, UK) and Tilaa BV (Amsterdam))					
Support Levels	Client Admin	User	External			
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

PHILANTHROPY CLOUD

VENDOR NAME

Salesforce

HQ

San Francisco, CA, USA

FOUNDED

1999

EMPLOYEES

40,000+

CLIENT BASE

Declined to disclose

ORG MARKET

Declined to disclose

R&D INVESTMENT

Declined to disclose

FEE STRUCTURE

Declined to disclose

PHILANTHROPY CLOUD IS BUILT ON THE SALESFORCE PLATFORM AND MANAGED BY UNITED WAY. ALL CLIENTS WORK WITH DEDICATED WORKPLACE ACCOUNT MANAGERS (WAM) WHO ASSIST COMPANY ADMINISTRATORS IN CREATING CLIENT-SPECIFIC CAMPAIGNS AND PLATFORM CONTENT. THE MARKETPLACE APPROACH TO GIVING AND VOLUNTEERING IS INTENDED TO SEAMLESSLY CONNECT EMPLOYEES WITH THE CAUSES THEY CARE ABOUT.

The user experience is centered around a modern interface with a focus on dynamic content in stylized cards as a Story, Campaign, Volunteer, Nonprofit or Impact Fund opportunity. A content management tool supports assigned volunteer leads (along with WAMs and administrators) in creating opportunities

("cards") with relevant and engaging content. Cards are stored under employee profiles for a full view of giving and volunteering history. Design elements, program tools and workflows provide multiple pathways to complete tasks with ease and efficiency.

Administrators are offered a range of native reporting tools that enable the tracking of volunteering and giving activity, and how activity supports the UN Sustainable Development Goals. Administrators can look forward to the analytical capabilities of Tableau to support volunteering and giving efforts as its integration with Philanthropy Cloud is on the 2020 roadmap. Also on the roadmap are enriched volunteering and giving opportunity curation and reporting functionality for nonprofits.

The platform is currently available only in the US and Canada, but due to expand to other jurisdictions.

NOTE: AT THE TIME OF PUBLICATION, SALESFORCE HAD NOT PROVIDED COMPLETE INFORMATION ON PHILANTHROPY CLOUD'S FEATURES AND SPECIFICATIONS. A COMPLETE OVERVIEW IS EXPECTED FOR THE NEXT EDITION OF THIS REPORT. THIS SPOTLIGHT IS BASED ENTIRELY ON PUBLICLY AVAILABLE ADVERTISING MATERIALS.^{18 19 20 21} AS SUCH, RWI INSTITUTE IS UNABLE TO VERIFY THE TRUE LEVEL OF FUNCTIONALITY AS OUTLINED IN THE EVALUATION KEY. THEREFORE, WE URGE PARTICULAR CAUTION WHEN COMPARING PHILANTHROPY CLOUD'S CAPABILITIES TO OTHER PLATFORMS REVIEWED IN THIS REPORT.

DEEP DIVE ① FEATURES & FUNCTIONALITY

- ✓ Salesforce advertises this feature as available but has withdrawn detailed information from this publication.
- ? RWI can neither confirm nor deny the availability of this feature based solely on publicly available documentation.

VOLUNTEERING

✓ Volunteer opportunity & event search	? Team volunteering PTO
? Proprietary volunteer opportunity database	? Dollars for Doers bank
Active opportunities (proprietary)	? Competitions
Real-time database (proprietary)	? Volunteer communities
? Volunteer opportunity database integration	✓ Volunteer profile
✓ Pushed volunteer recommendations	? Recognition and reward
✓ Volunteer opportunity creation	✓ Volunteer time

GIVING

✓ Nonprofit database	✓ Fundraising pages
✓ Nonprofit profile overview	? Funding status notifications
? Nonprofit partner request	✓ Giving profile
✓ Nonprofit search	? Recognition & reward
? Nonprofit access	✓ Check and EFT deposits
✓ Company foundation	? Direct payment
? In-kind donations	? Fees

VOLUNTEERING

? Nonprofit partner request	? Post-event surveys
✓ Basic event creation & management	✓ Dashboards
? Complex event creation & management	✓ Data & exports
? Disaster relief	✓ Real-time reporting
? Nonprofit access	✓ Mapping to UN SDGs
✓ Volunteer event types	? Workflows
✓ Self-reporting	
? Hours administration	
? Nonprofit hours validation	
? Individual volunteering PTO	

GIVING

? 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

- ✓ Salesforce advertises available options for this specification but has withdrawn detailed information from this publication.
- ? RWI can neither confirm nor deny the availability of options for this specification based solely on publicly available documentation.

3 VENDOR SUPPORT

COMMUNICATIONS

Communications (Internal)	?
Communications (External)	?
Sharing (Internal)	✓
Sharing (External)	?

USABILITY

Access	✓
Automation	✓
Error Identification	?
Look & Feel	✓
Search	✓

ARCHITECTURE

Compatibility	✓
Deployment	✓
Global	?
Integration	✓

SECURITY

GDPR	?
Permissions	✓

Exception Management	?
Implementation Time	?
Platform Languages	✓
SLA	?
Support Centres	?
Support Centre Locations	?
Support Levels	✓
Support Methods	?
Training Methods	?

STRATUSLIVE

VENDOR NAME

StratusLIVE

HQ

Virginia Beach, VA, USA

FOUNDED

2008

EMPLOYEES

11-50

CLIENT BASE

1000+ corporations

ORG MARKET

Mid-sized

R&D INVESTMENT

\$800K

FEE STRUCTURE

Annual subscription
(volume-based, per module)

STRATUSLIVE OFFERS COMPLETE VOLUNTEERING AND GIVING MODULES THROUGH A PLATFORM BUILT ON A FULLY CONFIGURABLE CONTENT MANAGEMENT SYSTEM (CMS). THE CMS OPERATES WITH TYPICAL WEB DEPLOYMENT INCLUDING EMAIL FUNCTIONALITY, ENABLING CLIENTS TO CONFIGURE THE LOOK AND FEEL FOR A BEST-FIT EMPLOYEE EXPERIENCE.

Beyond volunteering and giving, StratusLive offers customizable pages and content to assist clients looking to consolidate and promote all employee engagement programs under one platform (e.g. diversity and inclusion programs).

The platform offers unique and nuanced functionality to serve companies of all sizes. The StratusLIVE Ignite CSR Platform allows employees to combine multiple gift types (e.g. credit card and payroll) in a single gift transaction, gift paid time off (PTO) entitlements, and record ad-hoc giving activity that occurs outside of organizational programs. Similarly, employees can record ad-hoc volunteering activity not done in association with their organization.

StratusLIVE also enables profile portability, which allows employees to retain their giving accounts upon leaving or retiring from a company. StratusLIVE furthers their CSR portfolio with a CRM tool for nonprofits. While the two platforms are currently only used by companies in the USA StratusLIVE is focused on expanding market reach in North America.

DEEP DIVE ① FEATURES & FUNCTIONALITY

VOLUNTEERING	
<input checked="" type="checkbox"/> Volunteer opportunity & event search	<input checked="" type="checkbox"/> Team volunteering PTO
<input checked="" type="checkbox"/> Proprietary volunteer opportunity database	<input type="checkbox"/> Dollars for Doers bank
<input checked="" type="checkbox"/> Active opportunities (proprietary)	<input checked="" type="checkbox"/> Competitions
<input checked="" type="checkbox"/> Real-time database (proprietary)	<input type="checkbox"/> Volunteer communities
<input checked="" type="checkbox"/> Volunteer opportunity database integration	<input type="checkbox"/> Volunteer profile
<input checked="" type="checkbox"/> Pushed volunteer recommendations	<input type="checkbox"/> Recognition and reward
<input checked="" type="checkbox"/> Volunteer opportunity creation	<input checked="" type="checkbox"/> Volunteer time
<input checked="" type="checkbox"/> Nonprofit partner request	<input type="checkbox"/> Post-event surveys
<input checked="" type="checkbox"/> Basic event creation & management	<input type="checkbox"/> Dashboards
<input checked="" type="checkbox"/> Complex event creation & management	<input type="checkbox"/> Data & exports
<input checked="" type="checkbox"/> Disaster relief	<input checked="" type="checkbox"/> Real-time reporting
<input checked="" type="checkbox"/> Nonprofit access	<input type="checkbox"/> Mapping to UN SDGs

GIVING	
<input checked="" type="checkbox"/> Nonprofit database	<input type="checkbox"/> Fundraising pages
<input checked="" type="checkbox"/> Nonprofit profile overview	<input checked="" type="checkbox"/> Funding status notifications
<input checked="" type="checkbox"/> Nonprofit partner request	<input checked="" type="checkbox"/> Giving profile
<input checked="" type="checkbox"/> Nonprofit search	<input checked="" type="checkbox"/> Recognition & reward
<input type="checkbox"/> Nonprofit access	<input checked="" type="checkbox"/> Check and EFT deposits
<input checked="" type="checkbox"/> Company foundation	<input checked="" type="checkbox"/> Direct payment
<input type="checkbox"/> In-kind donations	<input checked="" type="checkbox"/> Fees
<input type="checkbox"/> Gift cards	<input checked="" type="checkbox"/> Disbursement cadence
<input checked="" type="checkbox"/> Payroll deductions	<input checked="" type="checkbox"/> Payment options
<input type="checkbox"/> International giving & matching	<input checked="" type="checkbox"/> Admin self-service
<input checked="" type="checkbox"/> Disaster relief (external)	<input type="checkbox"/> Dashboards
<input checked="" type="checkbox"/> Disaster relief (internal)	<input checked="" type="checkbox"/> Data & exports

VOLUNTEERING

<input checked="" type="checkbox"/> Volunteer event types	<input type="checkbox"/> Workflows
<input checked="" type="checkbox"/> Self-reporting	
<input checked="" type="checkbox"/> Hours administration	
<input checked="" type="checkbox"/> Nonprofit hours validation	
<input checked="" type="checkbox"/> Individual volunteering PTO	

GIVING

<input checked="" type="checkbox"/> Automatic matches	<input checked="" type="checkbox"/> Future forecasting
<input checked="" type="checkbox"/> Match optimization	<input checked="" type="checkbox"/> Real-time reporting
<input checked="" type="checkbox"/> Thresholds	<input checked="" type="checkbox"/> Tax information
<input checked="" type="checkbox"/> Processing & distribution	<input 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	INCLUDES... Personalized messages (admin-user) Direct message to external organizations
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 & Alerts	Field Completion	Format Validation	Submission Warnings & 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)	Mac OS (Browser)	Linux (Browser)	Android (Browser)	iOS (Browser)
Deployment	On-Premise	Cloud (SaaS)	Hybrid		
Global	Single Entity	Multi-Site	Multi-Country	Global	
Integration	Out-of-the-box APIs	Custom Integration			

SECURITY

GDPR	Compliant	Non-Compliant			
Permissions	Owner	Admin	Editor	Viewer	Custom to client needs and configurable by client admin

3 VENDOR SUPPORT

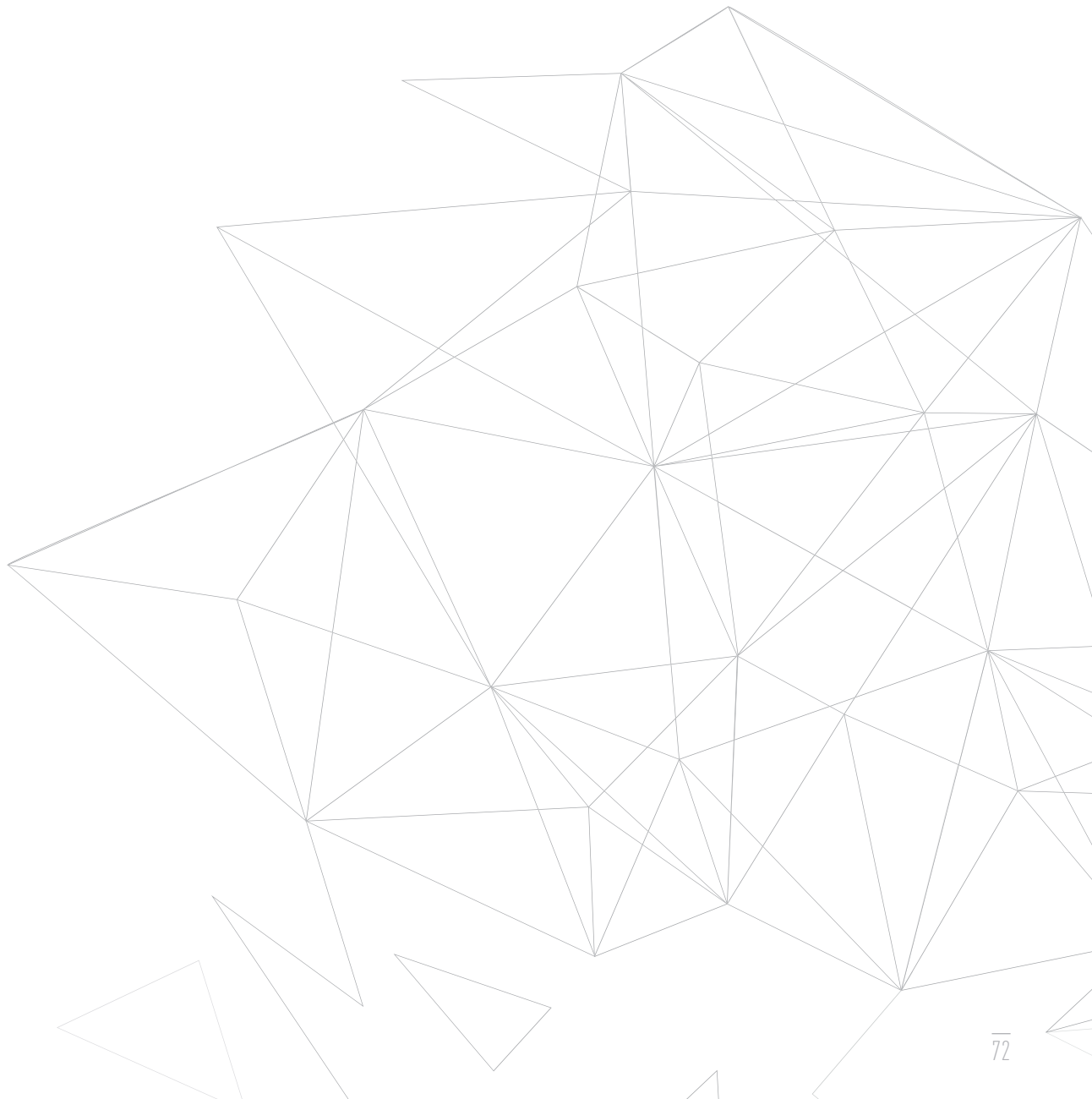
Exception Management	On-Screen Alerts	On-Screen Explanations	Self-Service Fixes	Integrated Help Options		
Implementation Time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
Platform Languages	Arabic	Chinese (Simplified)	Chinese (Traditional)	Czech	Dutch	English (UK)
	English (US/CAN)	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	2-day response time (business days)			
Support Centres	1 support centre					
Support Centre Locations	Virginia Beach, VA, USA					
Support Levels	Client Admin	User	External			
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

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:

———— YourMatch (VolunteerMatch)



YOURMATCH

VENDOR NAME

VolunteerMatch

HQ

Oakland, CA, USA

FOUNDED

1998

EMPLOYEES

11-50

CLIENT BASE

100 corporations

ORG MARKET

Large/Enterprise

R&D INVESTMENT

\$2.5M

FEE STRUCTURE

Annual subscription (volume-based) + support level fees + add-ons

VOLUNTEERMATCH IS A 501(C)3 NONPROFIT, AND PROVIDER OF YOURMATCH, WITH A FOCUS ON CONNECTING GOOD PEOPLE WITH GOOD CAUSES. THE VOLUNTEERMATCH NETWORK HAS OVER 4.5 MILLION OPPORTUNITIES AVAILABLE TO MEMBERS AND IS THE LARGEST VOLUNTEER PORTAL IN THE US.

Volunteering opportunity are curated from nonprofits (US and non-US), schools, and other organizations. YourMatch by VolunteerMatch is the business platform for employers to engage employees in traditional- and skills-based volunteering.

Organizations are provided with a custom YourMatch portal to deliver the user experience. Once employees complete their volunteer profiles, they are connected with causes they care about, curated by location, interests and skills.

Administrators can expect a full volunteering management module, wherein they have the ability to set up team events, volunteer shifts, track volunteer time, and report on activity accordingly. Volunteering impact can be reported on at the employee- and company-level, and can used to manage employee eligibility for paid time off or volunteer match grants.

The VolunteerMatch Network is available as an independent subscription service or can be integrated with other workplace volunteering platforms. Third-party platform providers typically enable the VolunteerMatch Network subscription on a client-by-client basis. Partners that currently enable integration with VolunteerMatch can be found on the VolunteerMatch website.

DEEP DIVE ① FEATURES & FUNCTIONALITY

VOLUNTEERING		
● Volunteer opportunity & event search	● Self-reporting	● Data & exports
● Proprietary volunteer opportunity database	● Hours administration	● Real-time reporting
● Active opportunities (proprietary)	● Nonprofit hours validation	● Mapping to UN SDGs
● Real-time database (proprietary)	● Individual volunteering PTO	● Workflows
● Volunteer opportunity database integration	● Team volunteering PTO	
● Pushed volunteer recommendations	● Dollars for Doers bank	
● Volunteer opportunity creation	○ Competitions	
● Nonprofit partner request	● Volunteer communities	
● Basic event creation & management	● Volunteer profile	
● Complex event creation & management	● Recognition and reward	
● Disaster relief	● Volunteer time	
● Nonprofit access	● Post-event surveys	
● Volunteer event types	● Dashboards	

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-Way	Two-Way	INCLUDES... Direct messaging (user-user, admin-user) Direct messaging (user-nonprofit) Social media sharing (third-party options) Social media sharing (Facebook, Twitter, 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 & Alerts	Field Completion	Format Validation	Submission Warnings & Blocks		Native Error Support
Look & Feel	Logo	Colors	Layout	Social Media Tags	Localizations	White Label
Search	Keyword	Event/Opportunity	Nonprofit/Association			

ARCHITECTURE

Compatibility	Windows	Mac OS	Linux	Android	iOS
Deployment	On-Premise	Cloud (SaaS) (Multi-Tenant)		Hybrid	
Global	Single Entity	Multi-Site	Multi-Country	Global	
Integration	Out-of-the-box APIs	Custom Integration	Guidestar, TechSoup, GreatSchools		

SECURITY

GDPR	Compliant	Non-Compliant			
Permissions	Owner (System Admin)	Admin (Event Manager)	Editor (Project Manager)	Viewer (User)	

3 VENDOR SUPPORT

Exception Management	On-Screen Alerts	On-Screen Explanations	Self-Service Fixes	Integrated Help Options			
Implementation Time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months	
Platform 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	Priority 1 (same-day response); Priority 2+ (1-2 business day response)			
	Support Centres	2 support centres					
Support Centre Locations	Columbus, OH, USA; Oakland, CA, USA						
Support Levels	Client Admin	User	External				
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	
	Documentation						

SOLUTION SPOTLIGHTS

GIVING & GRANTS

READ THIS SECTION IF YOU ARE LOOKING FOR A TECHNOLOGY SOLUTION THAT SUPPORTS ONE OR BOTH OF CORPORATE **GIVING** AND **GRANTS** PROGRAMS, OR IF YOU ARE LOOKING FOR MORE DETAIL ON:

———— Good2Give



GOOD2GIVE

THE BASICS

VENDOR NAME

Good2Give

HQ

Sydney, NSW, AU

FOUNDED

2001

EMPLOYEES

11-50

CLIENT BASE

150 corporations

ORG MARKET

Large/Enterprise

R&D INVESTMENT

\$1.1M

FEE STRUCTURE

Annual subscription + transaction fees (based on org. size and transaction volume)

AT-A-GLANCE

GOOD2GIVE MAKES PAYROLL GIVING TO NONPROFITS EASY FOR BOTH ADMINISTRATORS AND USERS. KEY TO THE EMPLOYEE EXPERIENCE ARE PRE-CONFIGURED GIVING WORKFLOWS, PERSONALIZED SUMMARY DASHBOARDS, USER GIVING HISTORY AND NONPROFIT NEWS BOARDS. EMPLOYEES CAN CHOOSE TO GIVE DIRECTLY OR VIA APPEALS, WHEREIN A SINGLE APPEAL CAN GO TOWARDS MULTIPLE NONPROFITS.

A separate solution is offered by Good2Give to fulfil grants management requirements, which contains core functionality for grants management including grant application workflows that can be tailored to client needs.

Good2Give also provides native reporting tools and dashboards that can be tailored to each client, and the status of platform transactions are visible to both the user and administrator via their respective dashboards. For example, Good2Give enables

employees to track their complete giving history, including gifts made outside of their organization by uploading donation receipts that are eligible for corporate match.

Good2Give integrates seamlessly with GoFundraise, a third-party platform that supports peer to peer fundraising efforts. The integration enables all funds raised through GoFundraise to be matched, when eligible, by companies within Good2Give.

On the development roadmap for Good2Give is an innovative and integrated Volunteering module to support employee volunteering programs. In the meantime, Good2Give can support simple dollar-matching for hours through internal grants functionality.

Good2Give operates exclusively in the Australian and New Zealand market.

DEEP DIVE ① FEATURES & FUNCTIONALITY

GIVING	
<input checked="" type="checkbox"/> Nonprofit database	<input checked="" type="checkbox"/> Fundraising pages
<input checked="" type="checkbox"/> Nonprofit profile overview	<input checked="" type="checkbox"/> Funding status notifications
<input checked="" type="checkbox"/> Nonprofit partner request	<input checked="" type="checkbox"/> Giving profile
<input checked="" type="checkbox"/> Nonprofit search	<input checked="" type="checkbox"/> Recognition & reward
<input checked="" type="checkbox"/> Nonprofit access	<input checked="" type="checkbox"/> Check and EFT deposits
<input checked="" type="checkbox"/> Company foundation	<input type="checkbox"/> Direct payment
<input type="checkbox"/> In-kind donations	<input checked="" type="checkbox"/> Fees
<input type="checkbox"/> Gift cards	<input checked="" type="checkbox"/> Disbursement cadence
<input checked="" type="checkbox"/> Payroll deductions	<input checked="" type="checkbox"/> Payment options
<input type="checkbox"/> International giving & matching	<input checked="" type="checkbox"/> Admin self-service

GRANTS	
<input checked="" type="checkbox"/> Applicant database	<input type="checkbox"/> Recognition and reward
<input checked="" type="checkbox"/> Grant eligibility	<input checked="" type="checkbox"/> Direct payment
<input checked="" type="checkbox"/> Forms	<input checked="" type="checkbox"/> Checks and EFT deposits
<input checked="" type="checkbox"/> Metadata	<input checked="" type="checkbox"/> Dashboards
<input checked="" type="checkbox"/> Grant application templates	<input checked="" type="checkbox"/> Data & exports
<input checked="" type="checkbox"/> Collaboration	<input checked="" type="checkbox"/> Real-time reporting
<input checked="" type="checkbox"/> Grant evaluation	<input checked="" type="checkbox"/> Workflows
<input checked="" type="checkbox"/> Applicant vetting	
<input checked="" type="checkbox"/> Applicant de-duplication	
<input checked="" type="checkbox"/> Review and approval workflow	

GIVING

<input checked="" type="checkbox"/> Disaster relief (external)	<input checked="" type="checkbox"/> Dashboards
<input checked="" type="checkbox"/> Disaster relief (internal)	<input checked="" type="checkbox"/> Data & exports
<input checked="" type="checkbox"/> Automatic matches	<input type="checkbox"/> Future forecasting
<input type="checkbox"/> Match optimization	<input checked="" type="checkbox"/> Real-time reporting
<input checked="" type="checkbox"/> Thresholds	<input checked="" type="checkbox"/> Tax information
<input checked="" type="checkbox"/> Processing & distribution	<input type="checkbox"/> Mapping to UN SDGs
<input checked="" type="checkbox"/> Vetting	<input type="checkbox"/> Workflows

GRANTS

<input type="checkbox"/> Approval thresholds	
<input type="checkbox"/> Grants agreement templates	
<input checked="" type="checkbox"/> Grant disbursement	
<input type="checkbox"/> Volunteer grants	
<input checked="" type="checkbox"/> Status notifications	
<input checked="" type="checkbox"/> Email records	
<input type="checkbox"/> Nonprofit access	

2 TECHNOLOGY SPECIFICATIONS

COMMUNICATIONS

Communications (Internal)	One-Way	Two-Way	<i>INCLUDES...</i> Announcements, system emails, news (admin-user, nonprofit-user)
Communications (External)	One-Way	Two-Way	Nonprofit communications (impact records, invitations, automated communications)
Sharing (Internal)	Available	Unavailable	
Sharing (External)	Available	Unavailable	Social media sharing (Facebook, Twitter)

USABILITY

Access	URL	Mobile-Friendly	SSO	Username & Password		
Automation	Workflows	Notifications	Form Auto-Population			
Error Identification	Rules & Alerts	Field Completion	Format Validation	Submission Warnings & 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)	Mac OS (Browser)	Linux	Android (Browser)	iOS (Browser)
Deployment	On-Premise	Cloud (SaaS) (Multi-Tenant)		Hybrid	
Global	Single Entity	Multi-Site	Multi-Country	Global	
Integration	Out-of-the-box APIs	Custom Integration			

SECURITY

GDPR	Compliant	Non-Compliant				
Permissions	Owner	Admin	Editor	Viewer	Custom to module managers	

3 VENDOR SUPPORT

Exception Management	On-Screen Alerts	On-Screen Explanations	Self-Service Fixes	Integrated Help Options		
Implementation Time	1-3 Months	4-6 Months	7-12 Months	12-18 Months	19-24 Months	24+ Months
Platform 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	1-day response time (business day)			
Support Centres	2 support centres					
Support Centre Locations	Melbourne, Australia; Sydney, Australia					
Support Levels	Client Admin	User	External			
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

SECTION 4

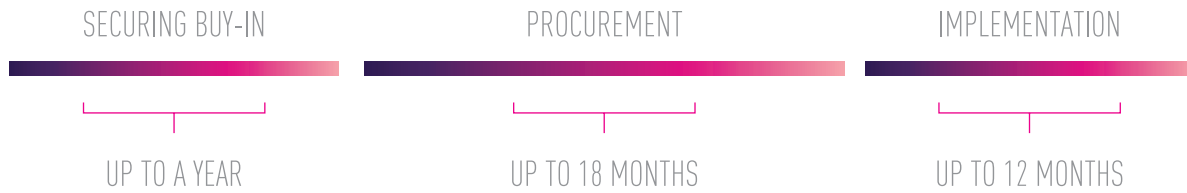
WHAT TO EXPECT

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



PROCUREMENT

END-TO-END PROCUREMENT TIMELINE BASED ON A TYPICAL DEPLOYMENT.



SOURCE: PDI-14, PDI-15, PDI-17

FOR MANY PRACTITIONERS SURVEYED FOR THIS REPORT, THE CURRENTLY IMPLEMENTED WORKPLACE VOLUNTEERING, GIVING, AND/OR GRANTS TECHNOLOGY SOLUTION IS ALSO THEIR FIRST.

Over 20% of respondents did not have a solution at all, while another 24% were operating the first platform they adopted. In other words, expertise in corporate citizenship technology or its acquisition is not commonplace.

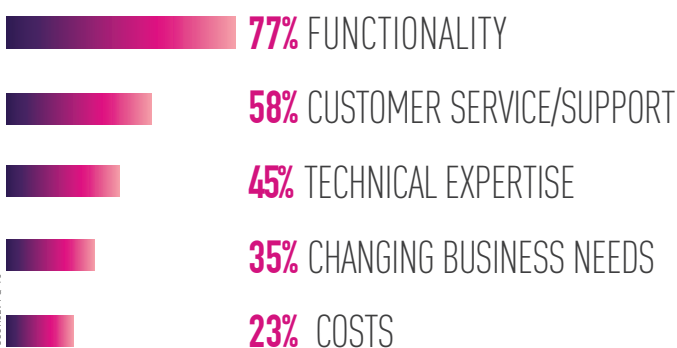
Whether it was their first or otherwise, practitioners were generally dissatisfied with their current solution, with 78% unlikely to recommend the platform due to lukewarm feelings about its ability to meet program needs. A full 25% were considering a switch with an additional 33% open to considering a new technology solution.

Around 80% of practitioners who had switched platforms saw employee utilization of the platform increase along with satisfaction with the programs. What isn't as clear is whether the promotion and socialization drive of the new platform or the new platform itself deserves credit for the increased engagement. Since program optimization and alignment happens before or alongside platform deployment, changes to programs can also account for changes in utilization and satisfaction.

With that context in mind, having a realistic preview of platform selection, implementation, and adoption becomes critical. But the effort starts before procurement, and as noted above, should include not only a discussion about the merits of one technology over another, but a more foundational process that evaluates the strategy and programmatic needs ahead of the tools used to get the job done.

Procurement of workplace giving, volunteering, and grantmaking technology is a new undertaking for many practitioners. But even for those with which it is more familiar, expertise and guidance is in short supply. Before embarking on their procurement journey, practitioners may benefit from a map outlining the road ahead.

TOP 5 REASONS PRACTITIONERS SWITCHED PLATFORMS



SOURCE: PDI-10

HOW LONG SHOULD IT TAKE?

Prior to the process of procuring a platform, most practitioners spent up to a year securing leadership buy-in, with smaller organizations (<5000 employees) being typically faster in gaining leadership support.

The procurement process can also be lengthy, potentially adding up to 18 months to the contract signing process, even when procurement is done without the formalities of an RFP. Only 41% of respondents in our survey indicated going through a formal RFP process.

Between buy-in and procurement, the process could take 12-24 months or in some cases, even longer. Corporate sponsorship, a solid business case, and a methodical approach to evaluation can all expedite the process.

Practitioners should be prepared for a prolonged process even before ink is put to paper on a formal procurement, and especially if buy-in has not already been secured.

WHO SHOULD BE INVOLVED?

At the procurement stage, typical participants are the teams directly responsible for the giving, volunteering, and/or grantmaking programs, internal IT, legal, marketing, communications, or HR teams. The most impactful involvement, however, is from the practitioners themselves.

Personal involvement in the procurement of the organization's workplace giving, volunteering, or grantmaking platform made a significant positive impact on practitioner perception of fit to program works for them and their willingness to recommend the platform to industry peers. Those who were involved in the procurement process were more than four times likelier to recommend the platform to others and feel that the platform fit their program needs than those who were not personally involved.

PRACTITIONERS WHO WERE INVOLVED IN PROCUREMENT WERE MORE LIKELY TO BE PROMOTERS



NPS +16 for involved, compared to -50 for not involved (PQ-5)



Fit to needs: NPS +15 for involved, compared to -50 for not involved (PQ-6). Source: PQ-5, PQ-6

Since the trend in the corporate citizenship industry has been towards Software-as-a-Service or cloud solutions, IT partners are expected to be increasingly involved in determining whether the vendor platform fits within the organization's data residency, architecture, security, and privacy guidelines. Legal and risk departments are expected to be involved to ensure compliance and legislative requirements are met; HR is expected to be involved where employee data is expected to interface with vendor platforms. Practitioners should expect to partner with these internal teams to balance their subject matter expertise and program needs with non-functional requirements; e.g. compliance, performance, availability. While participation may be broad, ownership should remain with program teams.

Reliance on research or advisor third party partners to aid with the process remains low, and the tendency is to shift support/responsibility to IT, HR, and procurement.

Accountability for a successful selection of a vendor solution that meets the program needs of an organization ultimately rests with practitioners and their sponsors, even though they will need to rely on a blend of internal and external resources. Strong project management fundamentals, fostering collaborative relationships, and focused personal involvement will be critical to success.

HOW MANY VENDORS SHOULD BE EVALUATED?

Our survey showed that when considering the shortlist of platforms for evaluation, practitioners performed their own cursory research through web searches, consulted other practitioners and users, or partnered with internal IT. 85% looked at 2-10 solutions before landing on a platform.

Expect that many of the solutions evaluated may not meet non-functional requirements from other teams, or at least not to the extent that they were expecting. In many cases, a deal-breaker for one team may be an acceptable compromise for another.

To vet shortlisted vendors, practitioners relied on their networks, secondary research, a requirements gathering effort to understand needs, and vendor demonstrations. Only about a third of these practitioners pursued a detailed, traceable process that combined and scored results across research and demonstrations, and fewer yet calculated ROI or cost-benefit analysis. Only 11% partnered with a third party to help with shortlisting. In our experience, this is in sharp contrast to other enterprise solutions, where practitioners use vendor-agnostic analyst groups like Gartner, Forrester, Constellation Research or any number of other organizations to help narrow the depth of field.

Expect a lot of back-and-forth with vendors before a final decision on a platform is made. Over 12-18 months, practitioners averaged 10 interactions with vendors, including calls, meetings, video conferences, site visits, and presentations, with some having reported as many as 20 interactions. Sometimes these interactions were to confirm that platforms complied with data privacy laws, were secure in protecting employee information, and were compatible with an organization's HR data governance requirements.

Organizations typically looked at between 2-10 solutions. Two may be too few or insufficient for thorough due diligence, while ten may be too many, suggesting requirements may have been too broad or evaluation criteria too lenient.

WHAT SHOULD YOU LOOK FOR?

For those practitioners who have had experience with a platform and are now looking to change, the top five reasons to switch were functionality, customer service, technical expertise, changing business needs, and cost. This suggests that organizations looking to procure a solution should prioritize their needs accordingly:

1. FUNCTIONAL/NON-FUNCTIONAL REQUIREMENTS
2. SUPPORT
3. TECHNICAL EXPERTISE
4. PLATFORM FLEXIBILITY (ABILITY TO ADAPT TO CHANGING NEEDS)
5. COST

FUNCTIONALITY

Functional/non-functional requirements have been covered in detail in previous sections of the report, but considering the functionality end-users find most important should help practitioners build requirement documents and vendor demonstration scripts that allow them to more effectively evaluate vendor platforms.

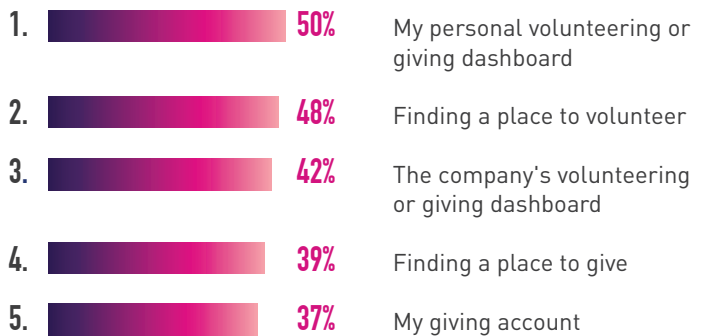
Vocabulary mismatch is a term that refers to the inconsistency in language use between practitioners in the same field when referring to the same things. This is a prevalent issue in software procurement, where buyers looking for functionality refer to it using certain words, while vendors offering that functionality know it under a different name. The issue can stem from a lack of consistent and agreed-upon language in an industry, or the colloquialization of certain terms.

In corporate citizenship technology, one such example may be the use of the word "global" by practitioners and vendors. While a practitioner may refer to a platform needing to have "global" capability to describe the expectation that the platform is able to perform similarly in all of its functionality regardless of the country or geographic region, a vendor may look at the same word and indicate the ability of its platform to be localized for different countries in terms of language support, input support, and access. Similarly, the words "app" and "mobile" can have different meanings.

Good requirements gathering practices aim to remedy the issue at the early stages of a procurement process, but evaluation criteria that clearly elaborates the expected outcome from a capability will also mitigate confusion in word choice.

When end-users were asked about what functionality is most important to them, as well as what functionality they use most frequently, the top 5 across both were as follows:

TOP 5 AREAS OF FUNCTIONALITY FOR USERS



SOURCE: EU-026, EU-027

End-users ranked visibility into their giving and volunteering alongside finding places to do so as the most important features in platforms. Social and collaborative aspects like creating events for colleagues and seeing what colleagues are up to – often touted as a way to engage employees – ranked in the bottom half for both interest and use.

Finally, software vendors operate with a 3-5 year product roadmap with quarterly or less frequent updates to the platform being made available to all of their clients. Roadmap functionality, while it could materialize in the future, or the vendor may determine that another set of capabilities should take precedence, is not real. Future functionality and functionality being contemplated on the roadmap along with other aspirational innovations not currently available should be considered with healthy skepticism and scored accordingly.

Practitioners considering platforms should prioritize functionality, but will need to be precise with requirements language, aligning on a shared vocabulary with vendors. They will need to consider the end-user perspective on features and capabilities, while simultaneously avoiding giving too much weight to roadmap capabilities that have not yet been developed by platform vendors.

SUPPORT

Vendor support comes in a couple of variations, which can be grouped as maintenance or advisory in nature. Maintenance or day-to-day support entails responding to questions and troubleshooting issues, assistance with setup and configuration, and account management. Advisory support means ongoing and continued partnership to ensure optimization and utilization of the platform.

While practitioners were generally satisfied with day-to-day support, they felt less enthusiastic about the support the vendor had to offer in terms of platform optimization to better support programs.

End-users viewed support differently. A third did not know what support options were available or who provided them, possibly because they have never had to use them. Others used an email mailbox, phone, or ticketing systems. Overall, users were pleased with the quality of support they had received. Since most support would be provided to end-users by practitioners or teams running the programs, indirect support needs should emphasize the value of a stronger relationship between practitioners and vendors or better access to resources.

Platform vendors will provide support to practitioners, who in turn will be expected to support a disproportionately large population of end-users. The most effective support mix will blend self-service through documentation and FAQs and phone/email support.

TECHNICAL EXPERTISE

As with ongoing support, one of the main reasons to switch platforms was the technical expertise or capability of the vendor to support system changes in line with program requirements. While many practitioners relied on internal IT resources, assisting with configuration, integration, conversion, reporting, and scalability challenges would also partially rest with vendor

technical resources. Over a third of those surveyed would likely caution their peers about their current solution provider when discussing the level and quality of continued support provided post-implementation to ensure optimization and utilization of the platform.

Practitioners evaluating platforms should consider the importance of understanding the breadth of not only the solution's current capabilities, but the resources and services available to make the best use of them.

Lacking technical expertise in CSR and corporate citizenship groups will force practitioners to rely on internal IT teams and vendor technical specialists. Cross-training of internal resources may be a way to build internal competency and increase self-sufficiency.

PLATFORM FLEXIBILITY

Almost 80% of practitioners indicated that their vendor platform offered white labeling or customization to a company's brand, suggesting it was a much sought-after feature. Further confirming that white labeling was popular was the end-user response: when users were asked about their workplace giving, volunteering, and grantmaking tools, a quarter of them did not know the name of the platform being used and another 21% thought the platform they were using was something their company had developed internally.

While over 50% of practitioner respondents had to make customizations to their platform, the group that made minimal or no changes reported being more satisfied with the platform's fit to needs and was more willing to recommend it to others.

This may suggest that more emphasis on requirements and procuring a better fitting product (or adapting to one) may be more impactful than acquiring a somewhat fitting solution and then customizing it to individual needs. Likewise, it is also possible that their programs were less complicated and more adaptable to "out-of-the-box" functionality.

Customization of platforms is common, but should be limited or at least heavily deliberated before proceeding. For practitioners, customization led to lower satisfaction with the organization's platform compared to "out-of-the-box" implementations. For solution vendors, it complicated supportability, maintenance, and even viability.

COST

Unsurprisingly, with cost being lowest on the list of reasons to switch, practitioners generally did not perceive the cost of their organization's platform to be unreasonable relative to the value for their company.

OVER

90%

OF RESPONDENTS RATED THE COST OF THEIR PLATFORM AS SOMEWHAT REASONABLE, REASONABLE, OR EXTREMELY REASONABLE.

That being said, in a procurement scenario where vendors benefit from a lack of pricing transparency, and practitioners are 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 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:

1. **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
2. **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)
3. **Variable or Fees** – these are per transaction or per volume of transaction levies, and time & materials-based customization
4. **Increases** – these are annual increases to the cost of licensing, usually for "innovation" or research & 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 socializing the platform with 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 will always be difficult to calculate.

Some organizations use separate envelopes for technical evaluations and financial evaluations. Including detailed price sheets that require vendors to provide detailed costs broken into the four types of costs at signing and over time (1-year, 3-year, 5-year) will help practitioners granularly understand the major drivers of cost, provide a consistent methodology to compare costs across proposals, and accurately forecast internal needs for budgeting and resourcing.

Even though practitioners did not find the cost of platforms unreasonable, many could not fully cost their solution and related services. Platform pricing can be complex, but generally includes one-time costs, recurring costs, and fees based on transaction size and/or volume.

"IF A COMPANY WANTS TO TAKE A MORE SOPHISTICATED APPROACH TO GIVING AND PROCURE THE TECHNOLOGY REQUIRED TO CREATE GREATER COMMUNITY IMPACT, IT IS IMPORTANT TO BRING THE RIGHT PEOPLE TO THE TABLE. A DATA-DRIVEN BUSINESS CASE FOR UNDERTAKING CORPORATE GIVING IS ALSO KEY. WHEN GIVING IS A STRATEGIC PRIORITY FOR COMPANIES, CSR TEAMS HAVE BIGGER BUDGETS AND ARE ABLE TO MAKE A GREATER IMPACT IN THE COMMUNITIES IN WHICH THEY LIVE AND WORK."²²

LISA GRINHAM, CEO, GOOD2GIVE

WHAT ABOUT EVALUATION?

Only practitioners will know what success within their own environment looks like, but if the primary reason for switching solutions can be viewed as a lesson learned, it can also be used as a framework for evaluation criteria. Only a third of practitioners used a detailed scoring mechanism when making their vendor selection.

The above ranking offers a loose blueprint that can be rearranged and tailored to suit each organization's respective needs. Of the various ways to rank criteria, the emphasis here should be on the weight of those criteria. For instance, if cost is least important, then the points allocated to it during evaluation should reflect its low ranking.

Once ranking and weight have been determined, a consistent, traceable method for scoring platforms would be needed, similar to a scoring key on a test. For example, "what would a perfect score for functionality require a vendor to demonstrate?".

A traceable, repeatable approach is one where the outcomes of a selection can be understood, explained, and defended for their merit.

Evaluation criteria during procurement should be ranked by importance to the organization, weighted accordingly, and scored based on a consistent methodology that is understood by both evaluators and vendors.



IMPLEMENTATION

FOLLOWING SELECTION AND CONTRACTING, THE WORK TO IMPLEMENT A SOLUTION INVOLVES NOT ONLY THE TECHNICAL COMPONENTS BEING DEPLOYED AND CONFIGURED, BUT ALSO THE SOCIALIZATION, COMMUNICATION, AND TRAINING TO PRACTITIONERS AND END-USERS.

Practitioners found implementations for workplace volunteering, giving, and/or grantmaking platforms to be moderate in difficulty on average, some easier, some harder.

Where it was known, the total costs of implementation (internal and external) ranged from \$25,000 to \$399,999, skewing towards the lower end of the range. Highlighting the difficulty of fully costing implementations, 35% of respondents were either unsure or could not say what they were.

Overall, practitioner respondents were satisfied with their platforms being able to support the breadth and quality of their programs. The strongest areas of satisfaction were features and administrative capabilities, while geographic coverage and customizability lagged slightly behind.

Following implementation, practitioners were most satisfied with functionality and support, and least satisfied with the quality of training and ongoing support from the vendor.

HOW LONG SHOULD IT TAKE?

Once a vendor platform is selected, implementation to go live lasted up to 12 months for most respondents, but was contrastingly longer for some. Implementation time was largely affected by a number of factors; the availability of IT, delays in contracting, implementation challenges, team resourcing, and program readiness.

Implementations were not without challenges:

OVER 

40%

OF DEPLOYMENTS DIVERGED FROM THE ORIGINAL PLAN (WHERE THERE WAS ONE)

WHO SHOULD BE INVOLVED?

More practitioners were personally involved in implementing the platform than selecting it, suggesting that many may have picked up where their predecessors had left off, or that resources were specifically added following the choice of a new platform. As in the case with personal participation in the procurement process, participation in the implementation process positively impacted practitioners' perception of the platform's fit to needs and their willingness to recommend it. Abstaining from the implementation process had an even more damaging impact on the willingness to recommend the platform (-64 compared to -50) and its fit to needs (-79 compared to -50) than not participating in selection.

PERSONAL INVOLVEMENT IN IMPLEMENTATION IMPROVED PRACTITIONER SENTIMENT FOR THEIR SOLUTION



Willingness to recommend: NPS +9 compared with -43 for uninvolved



Fit to needs: NPS +16, -79 for uninvolved.

SOURCE: PQ-23, PQ-7

While participating in both activities produced only a modest positive impact compared to involvement in just a single one, a lack of involvement in either procurement or implementation produced the most negative impact on both practitioner willingness to recommend and the assessment of the platform's fit to needs.

LACK OF INVOLVEMENT IN BOTH PROCUREMENT AND IMPLEMENTATION MOST DETRIMENTAL TO SENTIMENT



Involved in both: Willingness to recommend: +16, Fit to needs: +21



Involved in neither: Willingness to recommend: -75, Fit to needs: -83

SOURCES: PQ-13, P-023

For practitioners, the call to action is "get involved and stay involved."

Practitioners and their teams partnered with internal IT and the solution vendor to implement. Regardless of the size of organization, internal implementation teams varied in size from 1-10+, but were primarily in the 1-5 range. Members came from program groups, IT, legal, HR, communications, and marketing.

In the corporate citizenship technology industry, vendors implement their own solutions without relying on third party resellers or implementation partners. To some extent, it makes the relationship with the software vendor easier to navigate, but the most popular vendors will also be challenged for implementation resources.

Similarly to procurement, practitioners will be expected to deploy their platform alongside internal resources from IT, legal, HR, communication, and marketing teams, as well as those from external vendors. Strong personal involvement and ownership from practitioners should contribute to higher satisfaction with the end result.

WHAT ACTIVITIES SHOULD BE ANTICIPATED?

Implementation can be separated into technical implementation and platform socialization and rollout. The technical implementation will involve the following activities:

1. CONFIGURATION
2. INTEGRATION
3. DATA CONVERSION
4. CUSTOMIZATION
5. TESTING
6. PRACTITIONER TRAINER

CONFIGURATION

In the configuration stage, the vendor will stand up or set up the modules that have been procured, configuring organizations, users, and system roles. Configuration may also include setting up Single Sign-On.

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, colours, 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 company giving and volunteering views.

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 interface as well.

Likewise, some may want to connect to financial data or the general ledger for fee true-up or other reporting.

In organizations with centralized reporting or data warehouses, there may also be a need to interface.

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.

The implication for practitioners is that every integration will require time, effort, and cost to configure and test.

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 go down the path of interfacing 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, number of years, 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.

For those practitioners who already have a platform and are looking at deploying a new one, a decision will need to be made about history in the current solution. If history is being brought over ask: "What history? How much?" For data staying behind, ask: "What do we do with it?" The volume and type of data being converted will have a material impact on timelines, costs, and effort required.

CUSTOMIZATION

As noted in the procurement section relating to platform flexibility, most organizations choose to customize the solution they procure. Customizations may involve 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.

Evidence of the challenge associated with solutions being truly global arises from the contradiction between reported technological capability and "softer" platform elements.

WHILE 82% OF SOLUTION PROVIDERS CLAIM THAT THEIR PLATFORM ARCHITECTURE CAN BE CONFIGURED TO BE "GLOBAL," 47% OF THOSE SAME SOLUTIONS ARE ACCESSIBLE TO EMPLOYEES IN ONLY ENGLISH (35%) OR ONLY ENGLISH AND ONE OTHER LANGUAGE (11%).

Moreover, of the 28 common languages reported across all solutions, the most popular solutions (All-in-One Giving Solution, Benevity, CyberGrants, YourCause + Blackbaud) are accessible in only 12-19 languages. Until technological capabilities and localization needs are reconciled to provide truly global solutions, practitioners should exercise caution in understanding the degree of customization required to fit organizational and program needs.

The 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.

Vendors will need to balance accommodation of client needs, wishes, and aspirations while also providing a common supportable framework for practitioners and end-users. Unlike previous trends, with vendors willing to heavily customize platforms for clients, today's landscape sees vendors operating on 3-5 year roadmaps, offering minimal customization beyond branding.

In the end, customization may not be the optimal path forward for either practitioners or vendors. Those practitioners who 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 chosen not to customize or customize minimally.

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 configuration and customizations created are technically sound and produce 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 deployed.

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 in-class instruction, 1:1 training, webinars, peer-to-peer, as well as 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.

Platform socialization and rollout will involve the following activities:

1. COMMUNICATION
2. TRAINING OF END-USERS
3. SUPPORT

COMMUNICATION

Practitioners used internal communications, existing volunteer ambassador networks, word-of-mouth, and leadership messaging to engage end-user to ensure successful platform adoption. For new employees, orientation of the platform was incorporated into the onboarding process.

With consistent practitioner communication efforts, users whose job does not require use of the platform were introduced to it through internal communications like e-mail or their company's intranet, through volunteer champions or ambassadors, or through word of mouth.

COMMUNICATION DURING THE IMPLEMENTATION PROCESS CAN TAKE MANY FORMS, BUT MOST ORGANIZATIONS DEPLOY BOTH TOP-DOWN COMMUNICATIONS THROUGH OFFICIAL CHANNELS AS WELL AS BOTTOM-UP GRASSROOTS EFFORTS VIA CHAMPIONS AND AMBASSADORS.

TRAINING OF END-USERS

The majority of end-user respondents in our survey indicated they had not having received any training. Those that had were trained by internal CSR (or other program owners), or self-taught through navigating the system or by written instructions. The most common instruction came through documentations, FAQs, webinars, videos, and other asynchronous types of learning. Above all else, users thought documentation and FAQs were the most effective for learning, followed by classroom instruction, and videos.

SYNCHRONOUS:

CLASSROOM: 43% EFFECTIVE  4% INEFFECTIVE 

ASYNCHRONOUS:

WEBINARS: 33% EFFECTIVE  6% INEFFECTIVE 

VIDEOS: 39% EFFECTIVE  2% INEFFECTIVE 

FORUMS: 13% EFFECTIVE  4% INEFFECTIVE 

DOCUMENTATION/FAQ: 73% EFFECTIVE,  5% INEFFECTIVE 

SOURCE: EU-017

Despite users being mainly self-taught and only marginally satisfied with the training they had received, respondents thought platforms were intuitive and easy to learn. This could be a positive indication that organizations may not necessarily need to deploy robust training efforts beyond available documentation, videos, and instruction run by internal teams for those employees most likely to use the platform.

The undeniable challenge in training pertains less to getting those using the platform to understand how to use it, but in engaging them regarding the purpose of it at all and why it exists in the first place. Little training is focused on explaining 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 maintains end-user interest, may find their active employee base apathetic and diminishing over time.

"THE 'WHY' OF A COMPANY'S COMMUNITY INVESTMENT AND EMPLOYEE PROGRAMS IS THE THING THAT NEEDS TO CONTINUE TO EVOLVE. IN FACT, I BELIEVE IT IS EVOLVING BECAUSE, AMONG OTHER REASONS, MORE YOUNG AND DIVERSE LEADERS ARE ASSUMING POSITIONS OF INFLUENCE IN COMPANIES. THEY TYPICALLY HOLD A BROADER VIEW OF WHAT IT MEANS TO BE PURPOSE-DRIVEN AND INCLUSIVE, AS OPPOSED TO HANDING OUT DOLLARS WITH A NARROWER, MORE CONVENTIONAL PHILANTHROPIC MINDSET."²³

BRYAN DE LOTTINVILLE, FOUNDER AND CEO,
BENEVITY, INC.



Motivating employees or articulating the *raison d'être* is a shared responsibility. NPOs own the responsibility to convince employees of their cause. The organization provides the permission and time to engage, the platform facilitates a frictionless and efficient transaction, while practitioners combine these responsibilities as storytellers and advocates for corporate citizenship programs. Interestingly, when discussing the greatest barrier to more impactful corporate citizenship, each of the seven technology solution CEOs interviewed for this report cited the 'why' of giving and volunteering as the most significant issue for companies to address.

Training for giving, volunteering, and grantmaking technology have a strong emphasis on the mechanics of the technology through synchronous and asynchronous learning modalities, but could benefit from greater emphasis on the overarching purpose and vision.

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 with the different ways they can reach support, or who that support was being provided by.

When interacting with the platform, the majority of functional and technical issues users ran into had to do with infrequency of use. For end-users, then, a call to action would be "just go on and use it."

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

ADOPTION

ANY PRACTITIONER LOOKING TO PURSUE DEPLOYING OR SWITCHING A WORKPLACE VOLUNTEERING, GIVING, AND/OR GRANTMAKING PLATFORM WILL LIKELY BE INTERESTED IN EVALUATING THE EFFICACY OF THAT SOLUTION ON PROMOTING PROGRAM GOALS.

Some practitioners will have a general understanding of the giving and volunteering behaviors of employees in their organizations, as well as the performance of their programs, but reporting limitations will complicate presenting a more comprehensive view.

In our survey, a typical end-user has volunteered under five times over the last six months, spent between 1-6 hours a month volunteering their time, and gave to a nonprofit or charity a few or more times a year.



FREQUENCY OF GIVING:

<5 TIMES OVER 6 MONTHS (EU-05)

HOURS VOLUNTEERED:

1-6 HOURS A MONTH (EU-06)

GAVE TO A NONPROFIT OR CHARITY:

A FEW OR MORE TIMES A YEAR (EU-07)

SOURCE: EU-05, EU-06, EU-07

When choosing volunteering or giving opportunities, end-users prioritized activities that aligned with their values or interests, where they felt a personal connection, and were dependent on the type of work needed. Fewer respondents reported choosing opportunities promoted by the company or peers, yet catering to the individual interests of employees may seem at odds with the strategic positioning of the corporate citizenship program to create greater impact through focused investment.

The trend seeing the strongest results for adoption is one of both/ and rather than either/or. Offering choice to employees in both giving and volunteering ensures that, as end-users, they will participate and likely use the platform. Incentivizing the company's focus areas, along with a strong learning and development approach to citizenship will ensure the organization will achieve its stated CSR objectives with impact and authenticity.

Most end-users used the company's giving, volunteering, and/or grantmaking platform occasionally or weekly, and were generally very satisfied with it. Users that interacted with the platform at least occasionally tended to view it positively and were more likely to recommend it to coworkers and peers. Inversely, those end-users that never or only rarely used the platform tended to have a negative view of it. The inverse may also be correct – end-users who were satisfied with the platform used it at least occasionally.

In a nod to the value proposition of workplace giving, volunteering, and grantmaking platforms supporting programs, a majority of users indicated that the platform was better at helping them give or volunteer, and made giving and volunteering more enjoyable. Almost half of respondents indicated giving and volunteering more with their organization after using the platform.

Coupled with the positive changes to platform utilization and satisfaction after an organization switched platforms, these insights provide a compelling – or even hopeful – story about the efficacy of well-designed programs supported by technology.

And yet, over 50% reported little to no change in giving and volunteering, so work remains to be done.

For practitioners looking to drive adoption, understanding changes to giving and volunteering behavior, as well as studying activation numbers at launch and at regular intervals post-implementation would be useful indicators when evaluating programs.

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.

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.

*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.

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).

*RWI analyst discretion.


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.


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

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

 **Available** | The solution provider offers this capability/vendor 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 delivered 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 it 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 resent.
- **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.).

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