
Best Practices

SELECTING AND MANAGING
CORPORATE PHILANTHROPY SPECIALISTS
TO BOOST IN-HOUSE CORPORATE & EMPLOYEE GIVING PROGRAMS

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Corporate philanthropy and employee giving can contribute significantly to meaningful causes and simultaneously benefit giving companies in disproportionately rewarding ways. A good corporate philanthropy program can substantially improve employee morale and workplace pride, boost productivity, reduce HR costs, generate positive customer buzz, and drive top-line and bottom-line growth, with share price appreciation.

Deloitte’s “Predictions for 2014” report states that “responsible companies” had much higher levels of employee engagement, retention, customer service and profitability.

But despite measured and proven benefits, corporate philanthropy programs are often under-staffed and, therefore, may be poorly executed. However, a few easily implemented industry best-practices can drive giving programs to their full potential and energize a company’s workforce as well as the corporate image.

behind the scenes:

good corporate
philanthropy involves
a multitude of easily
outsourcable tasks

A comprehensive corporate philanthropy program involves multiple components such as:



Program planning, development, administration, management and communication



Vetting receiving organizations to ensure legitimacy and compliance with laws such as the USA Patriot Act



Accounting logistics and tracking for checks, payroll deductions, matching requests, grants, employee pledges and book keeping



Event organization, coordination, signup and participation logistics and much more

In-house teams may often flounder under the weight of routine paperwork, accounting, bookkeeping and administration, and lose sight of bigger things that can truly unleash the power of corporate giving. Moreover, a poorly-managed giving program often risks “hidden costs” that could arise from gaps in coordination across HR, IT, Payroll, Marketing, Compliance and Legal, such as data breaches, illegal non-profits with innocuous-looking fronts in the U.S., etc.

leverage corporate
philanthropy specialists
for transformational results

So, just as companies outsource non-core functions, corporations are increasingly bringing in specialists or consultants to handle their workplace giving programs and reaping the benefits of outsourcing from day-one, while ensuring corporate security on all fronts.

These exterior resources can help you leverage expertise to disseminate information on upcoming or ongoing philanthropic opportunities, enable automatic billing or payroll deduction, match grants, process checks, generate reports, analyze results, etc. A well-designed in-house philanthropy portal can be used to disseminate information, publish newsletters, celebrate achievements, and update blog and social media posts.

Philanthropy specialists know where to let systems handle routine tasks and where to bring-in valuable knowhow, organizational skills and best practices to boost enterprise-wide participation and performance.

Research shows that non-cash contributions rose from 57% in 2007 to almost 70% of all giving in 2012, and included in-kind resources, intellectual property, pro bono professional services, use of corporate assets and facilities, and product donations.

So, without spending an extra dime, outside consultants could help increase your program's social impact considerably by supplementing your cash-based giving with well-designed non-cash contribution initiatives such as staff volunteering or product/service donations.

They also understand that philanthropy is not a revenue center and structure their services with modest fees but still deliver transformational benefits to the corporations they serve.

tips on selecting a good
outsourcing partner

Companies should assess philanthropy outsourcing partners on objective criteria such as:

1. Hands-on experience with developing multi-faceted, employee-inclusive giving programs for organizations that resemble your company by size, industry, etc.
2. Scope and depth of philanthropy consulting expertise, platform availability and technology services
3. Account management and communication skills to quickly understand your company's guidelines and business rules, and structure a compatible giving program
4. Tangible results from past engagements, proven ability to perform benchmarking studies and share "best practices" with your company
5. Data Management and security best practices to manage information in a secure auditable way
6. Resources that will be applied to support your workplace giving initiative such as onsite staff, dedicated resources, shared resources, shared network security, etc.

Give prospective vendors full access to your existing program and have them present specific proposals on how they would transform your workplace philanthropy initiatives. Look for creativity, program level knowledge and depth, process, technology, metrics, delivery timeframes, expected results and engagement fees.

Proposals should include tangible recommendations on:

1. New giving options (such as credit cards, employee-controlled payroll deduction through a customized program website) and/or altering the match/disbursement schedule

2. IT, HR and security protocols and policies such as employee access to the program portal, login security and types of employee data that the vendor would access

3. PR and website branding, and how the program's website would mirror your company's intranet, Internet, mobile and social media presence

4. Integration of your company's various charitable initiatives by the vendor

5. Program benchmarks, evaluation guidelines, reporting and communications

6. Scope of stakeholder involvement to leverage outside resources for common causes

In addition, evaluate cultural fit, ask for references and look at the average duration and scope of a vendor's prior engagements. Ask about awards or recognitions, and how a vendor transformed charitable giving programs for client companies. Look for well-defined metrics such as increases in dollars donated, hours of volunteering, etc.

After you develop a vendor shortlist, visit one or two vendor clients if possible (to see vendor involvement first hand), and visit the vendor's offices to make sure reality matches the pitch.

managing an outsourced
philanthropy vendor

As with any outsourcing relationship, it is important to define deliverables, expectations, and processes prior to launch with your vendor, with Service Level Agreements, escalation processes and pre-agreed meeting schedules. Also agree on a system of checks, balances, metrics, reports and ongoing evaluations to ensure your chosen vendor performs to expectations.

If you run the selection-process wisely, your corporate philanthropy outsourcing partner should be able to deliver immediate benefits within weeks (such as taking over routine tasks from your in-house team and freeing them up considerably to focus on higher-level program planning) and set things in motion for a successful, ongoing, fully-participatory workplace giving program.

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