



# Buyer's checklist: CSR software

Questions to understand your company's unique software requirements



## Buying CSR software: what to consider and who to consult

How much time does your CSR team spend manually approving grant applications, tracking employee donations, and compiling impact reports? The answer is likely: too much.

Today, leading businesses invest in corporate social responsibility (CSR) software to cut down administrative tasks and free up valuable time and resources. But getting stakeholder buy-in, securing a budget, and navigating the procurement process can be intimidating if you don't know where to start.

Before you begin vetting potential vendors, it's important to have a solid understanding of your company's unique needs and requirements. We've put together this checklist to help you determine what to consider and who to consult, ensuring you make the right software investment for your business.

# What to consider

Kick off your CSR software journey by reflecting on your must-haves. Once you've got a clear list of requirements in hand, you'll easily eliminate vendors that aren't the right fit. Use the questions below to assess your software needs and streamline the procurement process.

## Key considerations for your organization

- 1 Safety, security, and compliance**

What is the vendor's vetting process for nonprofits? Find out if the platform can be integrated with the Internal Revenue Service (IRS), Office of Inspector General (OIG), and other internal watchlists to ensure grant dollars and employee donations are only routed to vetted organizations. Does the vendor assume legal liability for violation of anti-terrorism legislation like the Patriot Act?
- 2 Reporting**

What type of reports does your CSR team need to see versus your leadership team? What data would be the most useful to different teams and stakeholders? Do you need to be able to create custom reports and interactive dashboards so your team can monitor program performance, track outcomes, make evidence-based decisions, and demonstrate ROI to key stakeholders?
- 3 Processes and workflows**

Particularly for grantmaking programs, you may have standard processes for reviewing and approving applications. Do you need a tool that can help with workflow automation and management while maintaining internal requirements?
- 4 Technical**

Consider any IT requirements or customizations. Do you require single sign-on (SSO)? Do you need an authentication method for employees who don't have access to the network? Do you need a mobile-friendly platform?
- 5 Training and support**

How much hands-on support is needed to make the system functional? Are there out-of-the-box capabilities available so that program administrators can be self-sufficient?
- 6 Integration**

Does your software need to integrate with other tools like eSignature providers or accounts payable (AP) solutions? Consider all the systems that need to interact with your platform and make sure your selected vendor can accommodate them.
- 7 Access**

Do you have multiple program administrators who will need to access your CSR platform? Will they need different levels of permissions based on their specific roles? Find out if the software vendor offers role-based permissions.
- 8 Payments**

Find out what disbursement options are available. Does the vendor offer payroll integrations, automated clearinghouse (ACH), electronic transfers, or credit cards? Can they process checks on behalf of nonprofits? Find out about the fee structure for donations and disbursements. Does the vendor assume any of the administrative overhead so that nonprofits receive the full dollar amount?
- 9 Scalability**

If you're just getting started with CSR, you'll likely need a platform that can scale with you as your programs grow and evolve. Do you need technology that allows you to incorporate new features when the time is right?
- 10 Access:** Do you have multiple staff members who will need access to your solution?

# Who to consult

Once you've evaluated your software needs, you'll need to align with internal teams — from finance to IT to human resources (HR) — to ensure that you are meeting all company requirements. Below is a list of suggested teams and key considerations.

## Key considerations for your organization

### 1 IT and security

When purchasing software, involve your IT and security teams in the decision-making process from the start. They will help you understand internal procurement requirements, ensure that the platforms you're evaluating meet basic data privacy standards, and confirm their compatibility with other internal software.

### 2 Finance

For all your CSR programs — from employee giving to grantmaking — you'll want a solution that can alleviate the burden of managing disbursements internally. But the payments process is uniquely complex and requires strict compliance and security. Your finance team can help you ask the right questions about the vendor's disbursements process to make sure you're navigating the red tape effectively.

### 3 People and culture

Particularly for employee engagement programs, it's important to consult other stakeholders who host employee-centered initiatives, like diversity and inclusion, communications, and HR teams. These stakeholders can help you identify synergies between some of their programs and the software you are exploring. Aligning your engagement goals across these teams can help you gain internal buy-in and advocates for purchasing a platform. Plus, your HR teams are important stakeholders to consult whenever employee data is being handled.

### 4 Marketing, communications, and brand

Your CSR platform offers an excellent opportunity to reflect your company's brand identity. With flexible software that allows for customized messaging, imagery, colors, and fonts, you can use your platform to help reinforce your company's mission and values while building internal champions. Encouraging your marketing, communications, and brand teams to see CSR software as an additional channel for brand awareness will help you build more advocates for the platform.

### 5 Employees

Particularly for giving and volunteering programs, make sure you understand what kinds of capabilities will help incentivize participation and create a seamless user experience. Since employees will be the ones making donations, signing up for events, and logging hours, prioritize aligning the employee-facing portal with their expectations.



# Kickstart your software journey today

For more tips on choosing the best CSR software for your business, download our complete buyer's guide. Inside, you'll find key questions to ask potential vendors, data to help you get stakeholder buy-in, a look at Bonterra's Strategic Philanthropy solution, and more.



Buyer's guide: selecting the right CSR software



Ready to take the next step?  
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