



GUIDE

Buyer's guide: selecting the right CSR software

A company's commitment to corporate social responsibility (CSR) is more important than ever before. Since its inception, [CSR has evolved](#) from a business obligation into a key vehicle for retention, profitability, and success. Today, companies that invest in CSR are proven to have [40% higher levels of workforce retention](#), [6% higher market value](#), and [generate 20% more revenue](#) than their competitors.

Despite the increasing importance of CSR, implementing meaningful, long-lasting, and scalable programs is more difficult than it should be. For program administrators, creating the right initiatives, managing them effectively, and tracking their impact is often a manual, time-consuming, and complex process.

Today, leading corporations partner with a CSR software vendor to automate grant approvals, track employee donations, disburse funds, and report outcomes, freeing up more time to focus on strategy and impact. **But getting buy-in for CSR software and navigating the procurement process can be intimidating if you don't know where to start.**

We've put together this guide to help CSR leaders find a software vendor that meets their company's unique needs and requirements. Inside, we'll discuss:

- How to make the case for CSR software
- How to navigate the procurement process
 - Step 1:** Evaluate your company's unique software needs
 - Step 2:** Gather stakeholder inputs
 - Step 3:** Ask the right questions to find the right fit
- Why leading corporations choose Bonterra's Strategic Philanthropy platform



Prove the value of CSR software

When you're ready to implement CSR software at your company, you'll likely need to make the case to key stakeholders like finance, information technology (IT), and leadership teams to secure a budget. To help you prove its value, we've compiled a list of ways that corporate giving software can increase efficiency for CSR leaders and benefit your business's bottom line. With this information in hand, you'll be able to show the true return on investment (ROI) of CSR.



Benefits for CSR leaders

Free up time and resources: Running a CSR program can be time-intensive and demand a lot of resources. From tracking volunteer hours and processing matching gift requests to reviewing grant submissions and disbursing funds — it's an overwhelming amount of work. With CSR software, you can automate processes that were previously handled manually, freeing up time to focus on strategy and impact.

Tell your impact story: Without the right technology to support your CSR efforts, calculating ROI and reporting outcomes to key stakeholders can be difficult. And without measurable statistics, getting buy-in for new programs or increasing your budget is another barrier. CSR software with turn-key dashboards, automated reports, and real-time updates allows you to tell a compelling impact story and make the case for expanding your programs.

Scale participation rates: One of the biggest barriers that CSR teams face is low engagement rates. In many cases, employees aren't participating because they don't see the causes they care about reflected or because the process for logging their activities is confusing and complex. With CSR software, you can build a user-friendly interface that makes it easy for employees to quickly log their efforts and find giving or volunteering activities that excite them. When you make participation simple, easy, and intuitive, your employee engagement rates will skyrocket.

Benefits for your business

Achieve better business outcomes: When you're trying to win buy-in from leadership for your CSR program, it often falls to financials. Stakeholders want to know if giving and grantmaking programs will see a positive ROI — and research shows it will. Companies investing in CSR have a [6% higher market value and generate 20% more revenue](#) than their competitors.

Earn higher brand recognition: Aligning your company's CSR initiatives with issues impacting local communities can help build credibility and trust among consumers. [According to a recent global study](#), shoppers are four to six times more likely to purchase from a purpose-driven company and [42% of a brand's perception](#) is now based on their CSR practices.

Increase employee engagement: [Research shows](#) that CSR and a strong sense of purpose actively contribute to [increased employee engagement](#) rates. According to Gallup, when a company has an engaged workforce, they see a 17% increase in productivity, are 21% more profitable, and can have 41% lower absenteeism. In financial terms, disengaged employees cost businesses between [\\$450 and \\$550 billion](#) annually.



Procuring software: key considerations

Once you've demonstrated the value of CSR software to key stakeholders and secured buy-in, it's time to start evaluating vendors. To help you find the right software for your business, we've outlined three key procurement steps you should take.

Step 1: evaluate your company's unique software needs

Before you begin looking at potential CSR software solutions, it's important to have a solid understanding of your company's unique needs and requirements. We've created the following checklist to help you reflect on your current technology needs, so you can determine your must-haves when exploring your options.



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?

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?



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?

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?



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?

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.



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.

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?





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?

Inclusivity: If you are a global company, you may need an employee giving and volunteering platform that can accommodate international employees. Do you need a platform that can be made available in multiple languages, locations, and currencies?



Step 2: gather stakeholder inputs

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.



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.



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.



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.



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.



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.

Step 3: ask the right questions to find the right fit

Now that you've reflected on your company's unique needs, it's time to assess different software vendors to see which one is the best fit. The following questions will help you determine which solution best meets the needs of your business.

? Do you offer both employee engagement and grantmaking solutions? Can the solutions integrate?

? Describe your employee engagement platform. What kinds of giving and volunteering programs do you offer? Are there gamification capabilities?

? Describe your grants management platform. What does the application intake process look like? How does your platform automate workflows while maintaining internal SOPs?

? Describe your reporting tool. Are both standard and customizable dashboards available? Can employee engagement and grantmaking program data be accessed in a single reporting interface?

? Describe your disbursements model. What are your payment processing options? How quickly can funds be disbursed? How does your tool support a transparent payments process? How will your program's data be protected?





What is your process for vetting nonprofits? And how is the database managed?



What global capabilities do you offer? Is the platform available in multiple languages and currencies? How many global organizations are eligible to receive funds?



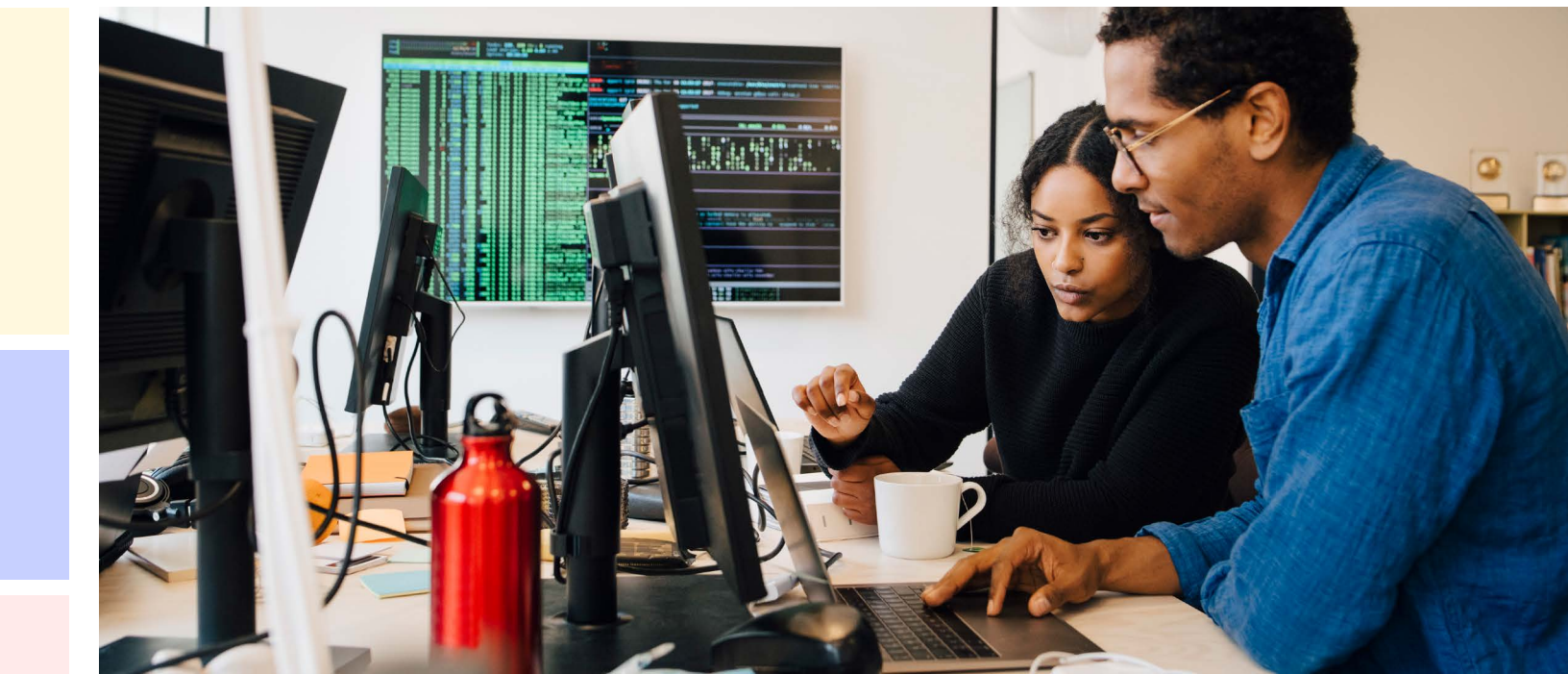
Does your platform allow for external API integrations?



Describe your customer support model. How do you support program administrators and end users?



How much time is needed to invest in onboarding and implementing your solution?



Meet Bonterra Strategic Philanthropy

At Bonterra, we offer purpose-built software to help accelerate grant approvals, boost employee engagement, expedite disbursements, and automate reporting. With over 20 years of experience partnering with over half the Fortune 500, we'll make sure you get the most out of your software. Let's look at how [Bonterra's Strategic Philanthropy solution](#) can help you level up your CSR efforts.



Create a unified platform: Bonterra Strategic Philanthropy allows you to manage employee engagement and grantmaking programs in a single, unified platform. This approach reduces the administrative burden on CSR teams and makes it easier to gain a holistic view into your company's impact across all funding programs.

Increase granting efficiency: For grants administrators, vetting nonprofit applicants, moving through approval workflows, and securely disbursing funds is often a manual, time-consuming, and tedious process. Our software allows you to accelerate approvals with tailored workflows, automated nudges, and end-to-end visibility at each stage of the application process. You'll also be able to confidently manage risk with user permissions, air-tight organization vetting, and audit trails.



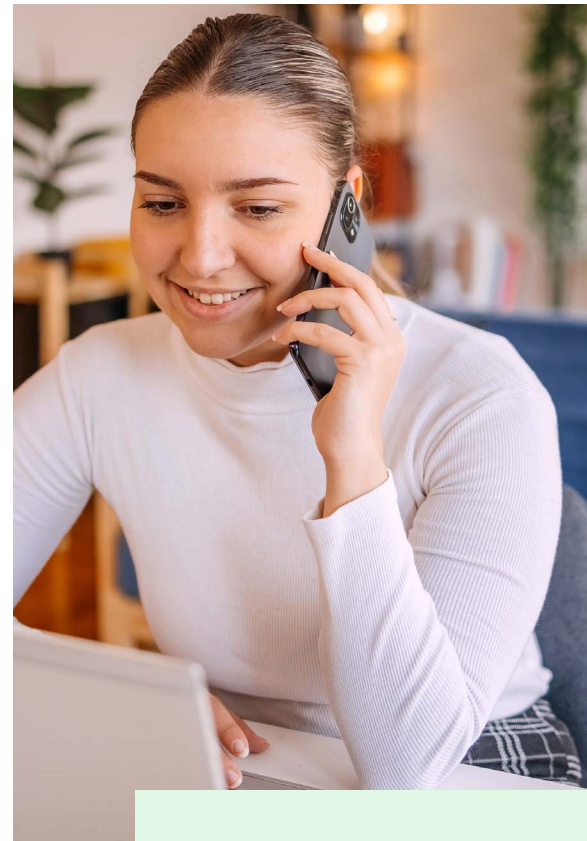


Scale employee participation: Create a personalized employee experience by reflecting giving and volunteering preferences within the donor portal. As a result, employees can more easily search for and find activities that align with their passions and interests. We'll work alongside you to build a user-friendly interface that matches your corporate branding to make the donor experience familiar, intuitive, and straightforward. The platform's simplicity and ease of use will help motivate participation and reduce the risk of losing donors.

Get the most out of your data: Bonterra's solution offers standard dashboards and self-service analytics, so you can easily measure outcomes across your entire portfolio, not just siloed grantmaking or employee giving activity. With grant program outcomes, employee engagement insights, and volunteer data available in real-time, you can make program improvements as you go, not just at the end of an initiative.

Confidently disburse funds: Bonterra's Disbursements Service allows you to deliver funds quickly and offload the administrative burden of managing payments. Our comprehensive service includes charitable vetting, anti-terror and -fraud watchlist screening, customer support, and distribution, all in one platform. As your payments partner, we'll assume legal liability, offload administrative overhead, and provide greater transparency into your funds flow.

Connect with pre-vetted nonprofits: Administrators can easily find nonprofits that align with their company's values and goals through a searchable record of 160,000 pre-vetted organizations. With a single nonprofit profile that reflects information like banking details, cause overview, 501(c)(3) status, and more, you'll reduce the administrative work associated with maintaining accurate nonprofit profiles.





At Bonterra, we're more than just software. We're your partners in strategic philanthropy.

As the CSR landscape continues to evolve, [with changing expectations among employees, consumers, and nonprofits](#), we'll work alongside you to build a platform informed by industry trends and best practices. As a result, you'll deliver the most impactful employee engagement and grantmaking programs, transforming CSR into true strategic philanthropy.

[Connect with one of our experts](#) and find out if [Bonterra Strategic Philanthropy](#) is right for you.

[Schedule a demo](#)