

Focus on Strategy Webinar Series: Workplace Giving August 18, 2020

Moderator:

Emily Wanderer, Senior Account Executive, CSR, Employee Engagement, YourCause

Panelists:

Jinny Jeong, Manger, Corporate Leadership, CECP

Kimberley Serzynski, Associate Director, Global Philanthropy, AbbVie

Michele Walker-Moak, Manager of Community Affairs, Applied Materials, Inc.

Speakers



Emily Wanderer

Senior Account Executive
YourCause + Blackbaud



Jinny Jeong

Manager, Corporate
Leadership, CECF



Kimberley Serzynski,

Associate Director,
Global Philanthropy,
AbbVie



Michele Walker-Moak,

Manager of Community
Affairs, Applied Materials, Inc.

Poll Question

What is your company's biggest priority for its employee giving & matching gifts program?



Chief Executives for Corporate Purpose® (CECP) is a CEO-led coalition that believes that a company's social strategy — how it engages with key stakeholders including employees, communities, investors, and customers —determines company success.

THE Power of the Network

YourCause + Blackbaud





+

blackbaud®

Better Together.

Technology solutions to power the social good ecosystem.

- 180 Countries
- 20 Languages
- 400 Corporate Clients
- 8M Corporate Employee End Users

ONE PLATFORM. MANY POSSIBILITIES.



GIVE



VOLUNTEER



GRANTS



ENGAGE



REPORT & MEASURE



8th Industry Review

Purpose:

Industry insights into Giving, Volunteering, and Global & Locally Relevant Employee, and Community Engagement Trends

Methodology:

- Activity Data from CSRconnect Usage (not self-reported by companies)
- January 1, 2019 – December 31, 2019
- Customers with 2+ years of CSRconnect Usage
- 150 Clients Included of 350 Total Clients, representing over 4.4M Employee End-Users

Apply IR 2020 Data Insights + Support Disaster Preparation

- **Train** employees on Engagement and Social Good Programs
- **Empower** employees' choice
- **Unite** employees with similar interests
- **Tailor** the experience to the Employee Type, Retirees vs. New Employees

Engagement Surges w/ COVID, Trends Reinforce

Sense of Responsibility:

- 47% of Companies Allocated Donations toward COVID-19

Employees Take Action:

- 58K Donations Every Hour

Build Momentum with Fundraising:

- 15x Higher Engagement, Match Rate of 1.6x

Democratize Giving:

- 82% Provided Employees a Choice of Organizations

Responsible Giving & Nonprofit Stewardship:

- 96% Gave via Credit Card

Disaster Relief + Diversity, Equity, & Inclusion Strategy Aligns with Engagement & Industry Trends

- Build and Collaborate with ERGs/Affinity Groups
- Provide Employees a Choice in Volunteer/Giving/Matching
- Give Employees a Voice in Corporate Giving Programs
- Proven Charity Vetting & Strong Partnerships
- Provide Employee Relief/Emergency Assistance
- Skills-based Volunteering for Professional Development

CECP Data & Insights



Types of Matching Gift Programs

1. **Workplace Giving Campaigns:** Fundraising drives, such as the United Way, which occur for a **defined time period** in which the company expends time/effort in organizing and obtaining participation. If the campaign includes opportunities for employees to pledge payroll deductions throughout the year, include the total match to these payroll deductions here. Also known as 'federated funds'.
2. **Year-Round Policy:** Giving that is not driven by a specific corporate campaign and which benefits nonprofits. Includes corporate matches of employee payroll deductions if employees sign up at their own discretion **throughout the year** (not as part of a time-bound, defined campaign).
3. **Dollars for Doers:** Corporate or foundation giving to nonprofits in recognition of a certain level (as defined by the company or foundation) of **employee-volunteer service** to that organization.
4. **Disaster Relief:** Matching programs benefitting nonprofit organizations assisting with **disaster related** crisis relief, recovery, rebuilding, and/or preparedness for a specific disaster.



Budget Sources

Community Investments

Defined by CECP Valuation Guidance

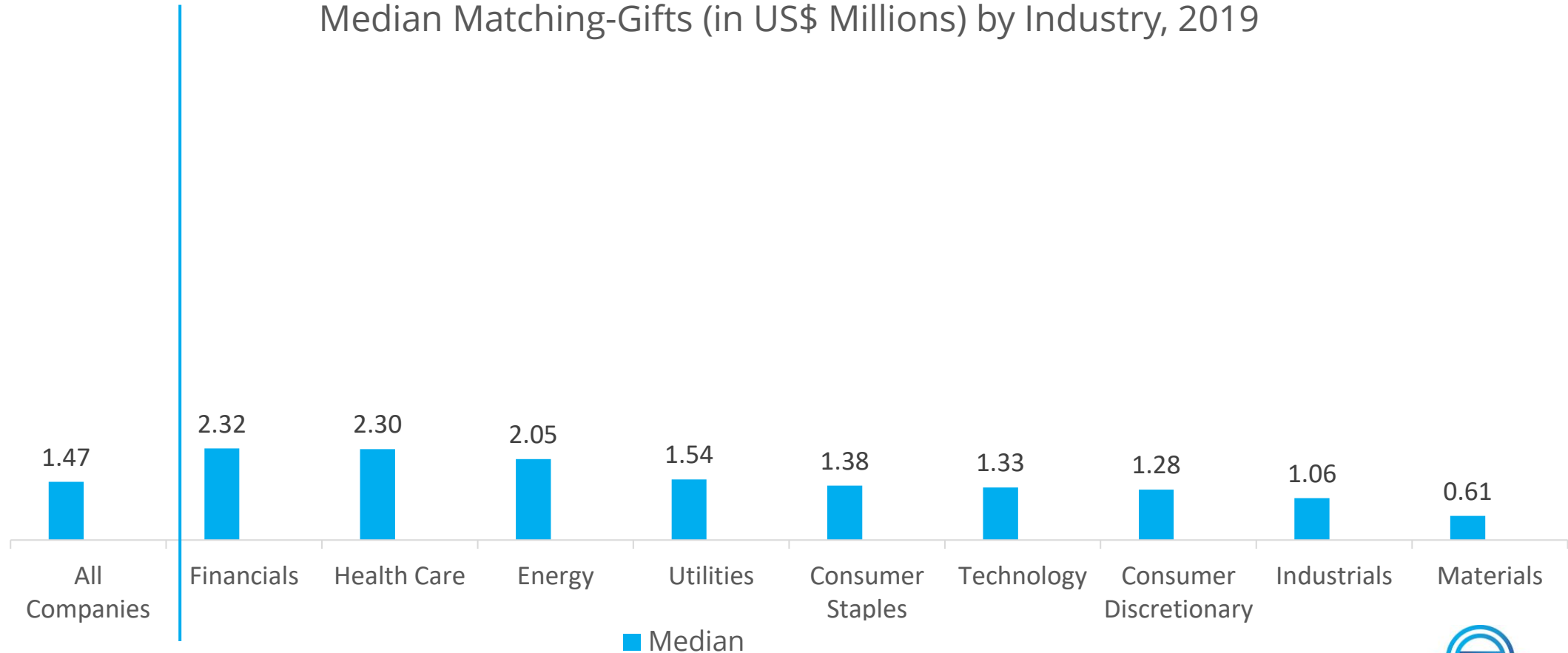
- Corporate Cash
- Foundation Cash
- In-Kind & Pro Bono (at FMV)



**Matching Gifts can come
from either budget source**

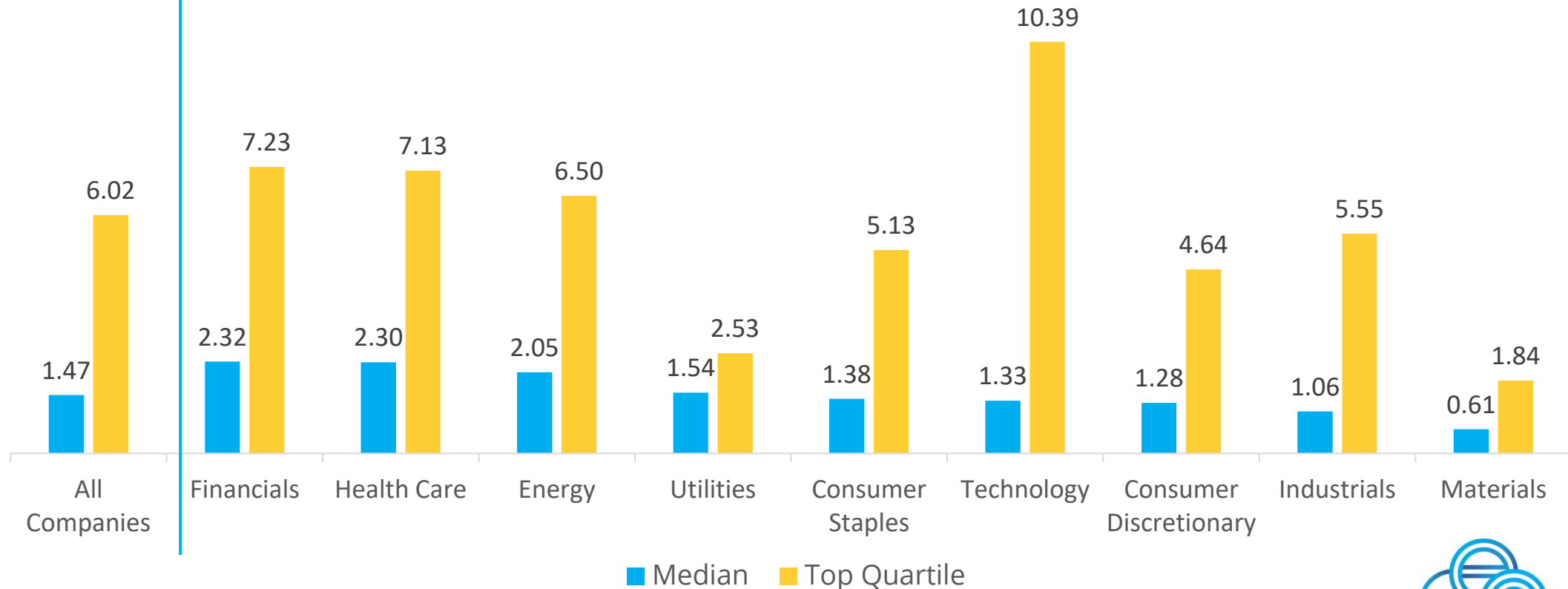
Matching Gifts as a Percentage of Cash Giving

Median Matching-Gifts (in US\$ Millions) by Industry, 2019



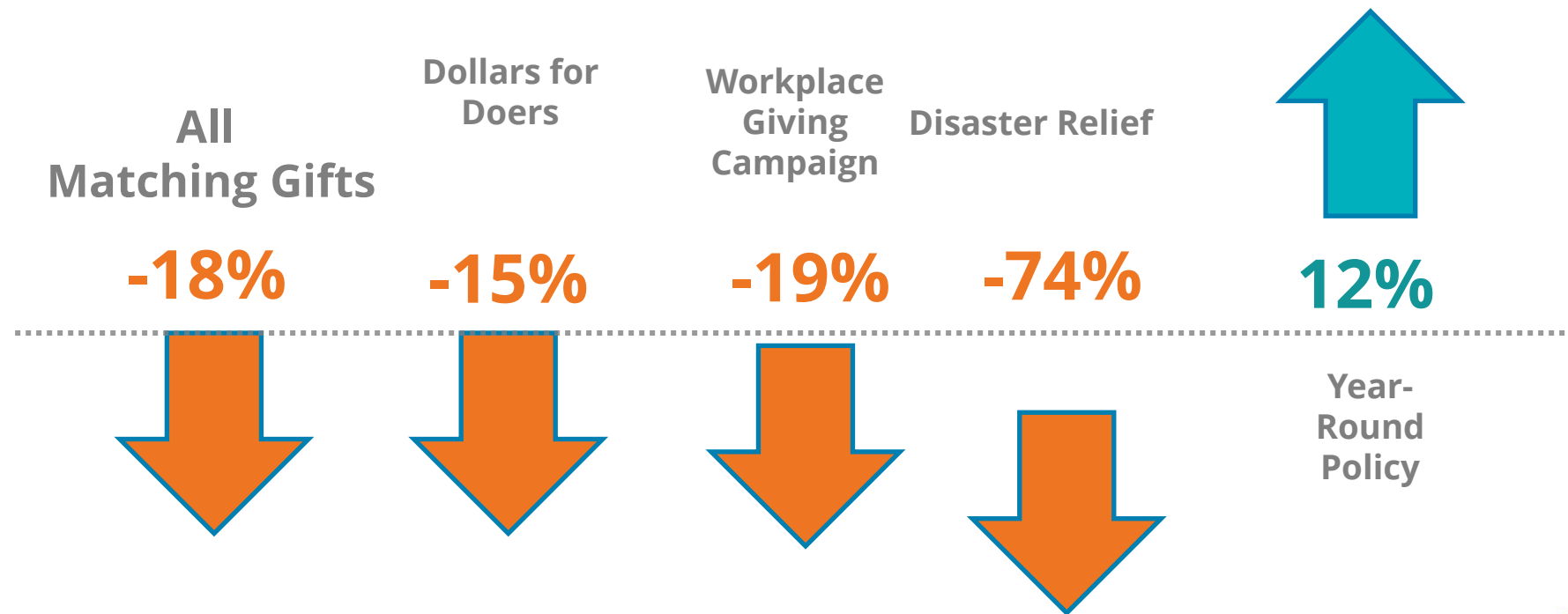
Matching Gifts as a Percentage of Cash Giving

Median Matching-Gifts (in US\$ Millions) by Industry, 2019



Matching Gifts Decreased - Dollar Values

Growth Rate of
Median Matching Gifts (USD\$)
2017 vs 2019



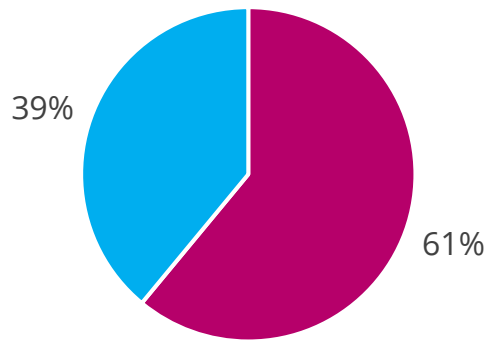
Matching Gifts Decreased - No. of Companies

Percentage changes in companies **offering** such programs over a three-year matched set (2017-2019):

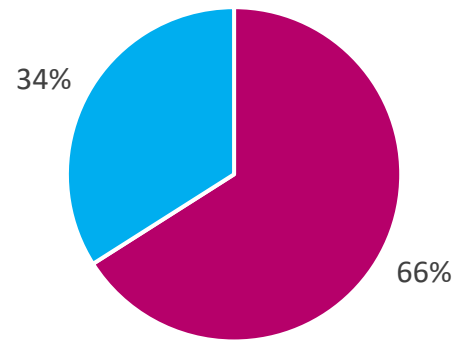
- ↓ Workplace-Giving Campaign: 48% to 39%
- ↓ Year-Round Policy: 88% to 81%
- ↓ Dollars for Doers: 59% to 58%
- ↓ Disaster Relief: 47% to 19%

Types & Limits of Matches by Program

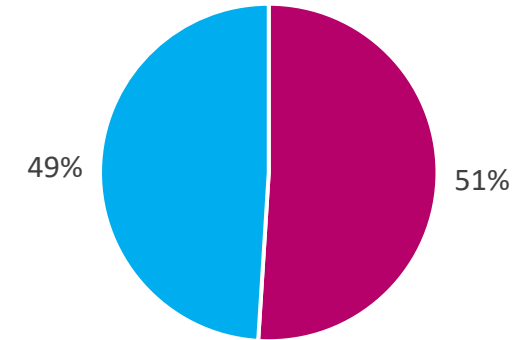
All Programs



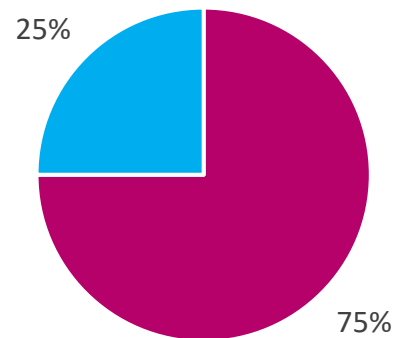
Year-Round Policy



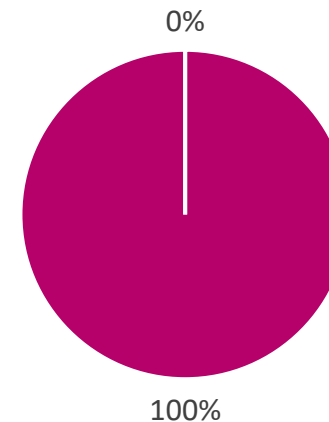
Workplace-Giving Campaign



Dollars for Doers



Disaster Relief



■ Open (no limit to type of organization)
■ Limited (in some way)



More on Workplace & Employee Giving

From the 2019 Giving in Numbers Report (www.cecp.co/GIN):

- **Pages 23-24:** Matching Gift Programs and details
- **Page 25:** Employee Giving (“philanthropic leverage”)



Panel Discussion



Speakers



Emily Wanderer

Senior Account Executive
YourCause + Blackbaud



Jinny Jeong

Manager, Corporate
Leadership, CECF



Kimberley Serzynski,

Associate Director,
Global Philanthropy,
AbbVie



Michele Walker-Moak,

Manager of Community
Affairs, Applied Materials, Inc.

Poll Question

How do you anticipate employee participation in matching gift programs will change this year (2020) compared to 2019?



Wrap-up

- Pulse surveys once a week
- Log into MyCECP for self-access benchmarking & other resources
- Save the dates:
 - **October 29:** The 2020 *Giving in Numbers Report* released
 - **November 2020:** Webinar on the recently released Report
 - **January 2021:** Next year's survey launches
 - Additional on www.cecp.co/events
- Do you have an idea to submit for a future CECP event? Please reach out and let us know! insights@cecp.co



THANK YOU!

Jinny Jeong

Manager, Corporate Leadership

CECP

jjeong@cecp.co

