

Switching Workplace Giving Providers

Your guide for choosing a new partner for
your employee giving program



Change is hard.

This seems especially true when it comes to changing your employee giving partner.

Changing providers and platforms is a multi-step effort that may involve soliciting bids, reviewing proposals, interviewing candidates, making your selection, negotiating a deal, and getting approval from your top executives.

And that's before you even begin the cumbersome process of migrating over to a new system. It's a lot of work!

But while the process can seem daunting, there are times when the pain is worth the gain. At America's Charities, we've been working with companies that manage employee giving and volunteering programs for nearly 40 years and we've found that, more often than not, those who choose to make a switch end up being happy with their decision.

That's because the previous vendor simply didn't offer what the employer needed. Every employee giving partner has its strengths — but sometimes those strengths don't align with your needs.

Click here for more reasons why companies rethink their purchasing decisions.



Real-life Reasons Why Companies Report Wanting to Switch to a New Vendor:

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“Our current vendor doesn't give us the support we need. Instead of helping us, we need to solve problems ourselves.”

“The technology doesn't do what we need it to do.”

“Our employees don't like using the platform.”

“We can no longer support our in-house system.”

“We can't afford to work with our current vendor. The costs have gotten out of control!”

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If you find yourself saying one or more of these things about your current employee giving solution, it might be time to start looking at your options.

This guide will help you understand how to navigate this process so you can make a smart, informed choice — and so you can be fully aware of how to prepare to make the transition once you make that selection.

Understanding Your Needs

Before you start reaching outside your organization to begin vetting potential employee giving partners, it's important to look inward and ask yourself a simple question:

What do you really need?

Having a good answer to this critical question before you begin your search can save you a lot of time — and headaches — as you embark on this journey.

The answer might seem obvious at first. But, like an onion, it has a lot of layers.

Roseanne Wark, America's Charities director of client engagement, works with companies large and small who switch providers and says, "the organizations that make the best decisions — and make the most seamless transitions — are the ones who have done their homework up front."

Often, that means thinking through what your company needs from a number of perspectives. These include:



Expertise and Support Services

While you might be an expert in some aspects of employee giving, you might need more support in others. That's why it's valuable to assess whether you just [need better software, or need a partner](#) with a proven track record who can offer guided support and services to deliver the results you expect from the technology.

Do you want expertise to help you develop your strategy and build a best-in-class program?

Do you need attentive, on-demand support for troubleshooting or do you have the bandwidth and knowledge to solve most problems in-house?

Do you need a partner who can arm you with reports to give to your leadership, summarizing giving results and trends, help desk calls and frequently asked questions?

Do you need a partner that can help you market your program to employees or help build relationships with nonprofits?



Technology

What do you actually need your platform to do? We recommend starting the process by creating a list of 'must-have', 'nice to have', and unnecessary features.

To develop that list, spend some time up front assessing your current system to figure out what works well and what isn't hitting the mark. If possible, review your analytics to find out how employees are engaging with your current platform (for example, your employees might be more likely to engage at work on their desktop computers or off hours on their mobile phones).

And talk to your IT team and other engaged employees to create your list of tech specifications.

Finally, it's important to make sure you assess the back-end functionality to ensure that the provider is able to collect contributions, process them, and then direct them to the right nonprofits on your preferred schedule.

“The organizations that make the best decisions — and make the most seamless transitions — are the ones who have done their homework up front.”

Roseanne Wark
Client Engagement Director,
America's Charities



Data and Reporting

Some companies choose a new partner because they aren't happy with the amount of data and type of information provided by their vendor. Having the right data available can drive your program strategy, ultimately helping your team identify opportunities for growth and ascertain whether certain approaches are working or not.

What type of reports and information do you need the partner to provide so you can run a data-driven program?

Do you have custom reporting needs? If so, can the provider accommodate those needs?

Assess how much reporting you need from your partner — and be sure to articulate your data needs up front.



Funds Management and Payment Processing

After your employees donate through your program, then what happens? How do you know the charities your employees have designated are legitimate, and how do you know the funds actually get to employees' designated charities?

Will you manage your company's workplace giving charitable funds distribution and charity vetting in-house or do you need your partner to manage this process? If the partner is managing the process, are they a 501c3 themselves or do they have to outsource this to another organization?

Are there restrictions on payment processing or disbursing donations such as minimum donation amounts or requirements for the charity to "register" with the provider? Are there extra fees for things like issuing checks?

How is donation information shared with the recipient charities? And does the partner provide support and customer service to charities with questions about their donations?

What is the provider's process for managing returned checks from charities and what happens when a charity is no longer qualified to receive donations?

To safeguard employees' donations and ensure accurate and timely funds distribution, make sure you understand what (if any) [funds management and charity vetting](#) services the partner offers and how the process works.



Budget

When it comes to assessing employee giving programs, the elephant in the room is often cost.

Of course, your company will want to negotiate the best possible deal, but it's helpful to know your budget before you go shopping — even if you don't share it with the vendors you're vetting.

We'll talk more about pricing later, but it's important to have a ballpark budget in mind at the beginning of the process. That will help you avoid wasting time vetting vendors that are out of your price range — and can help you negotiate the right deal later in the process.

Download our white paper, *Powerful Metrics & Methods for Measuring Effective Social Impact*, for help identifying what type of data and reporting your team will need.

Click here to learn how a Fortune 500 company scaled its impact and cut costs by more than \$225,000 by changing its funds management process.

Building Your Timeline and Process

When Tracye Funn began looking for a new employee giving vendor to work with her company, Washington Gas, after the previous provider's contract ended, she estimated that the process would take between six and eight months.

It took 10.

The reason? There are a lot of moving parts.

Not only do you need to budget time for your own decision-making process, you also need to account for the timeline of the partner you choose, and the time it takes to migrate over to the new platform and train employees on how to use the new system.

And even after you've done all of that, leave a buffer. As with all complex projects, you need to make sure that you account for the unexpected.

"Whatever you put into your planning process, add two months to your timetable," Funn says.

For some companies, that means you might need to start your search for a new vendor up to a year before your contract ends or the next campaign begins. For companies with more complex approval processes, you might need to extend that timeline even farther.

However you decide to structure your timeline, it's important to make sure you establish processes for the following as early as possible:

"Whatever you put into your planning process, add two months to your timetable."

Tracye Funn
Manager of Corporate Contributions,
Washington Gas,
America's Charities client



Invite and Solicit Bids

Establish how many vendors you'd like to approach — if you do your homework, you may find your ideal new provider from the get-go. If you need to solicit multiple bids, decide whether you want to draft and circulate a formal RFP or whether you want to request proposals more informally. Create a deadline for when you'd like to receive proposals — and be sure that you set aside time to answer questions from potential partners ahead of the deadline.



Demonstrate Platforms and Vet Proposals

Will you be making the selection yourself or will you have a search committee? What other departments need to be involved - legal, procurement, IT, security?

How many providers will you interview? Can they demo their platforms and speak to their specific services, beyond software? And what process will you need to follow to get final approval for your decision?

Once you answer these questions, establish how much time after you've received proposals you'll need to make your selection.



Finalize the Contract

Some companies require a lot of time to finalize and approve contracts. Others move quickly once they have a handshake agreement. Decide which category you fall into and budget the appropriate amount of time to get through the process.



Make the Transition

Once you have a deal, you're still just getting started. Now, you need to migrate over to the new platform, build new processes, and train employees on how to use the system. Your internal team can help you understand what's needed — and who needs to be involved — in order to get things set up on your end. Your new provider should also provide you with a timeline for what it takes on their end to get things done.

At a minimum, this process usually takes two to three months. Remember, though, that's a minimum. For some providers — and most companies — the process usually takes longer. You're better served leaving extra time for this part of the process than not enough.

Making Your Choice

You know what you want, you've established your process, and you have a stack of proposals sitting on your desk.

How do you decide which is the best choice for your company?

If you took the time up front to know your specifications, the process begins with assessing which provider comes closest to being able to deliver on your specifications.

But, in some cases, you need to look under the hood to make sure what they're promising in their proposal and in sales calls is really what you'll get.

"The marketing sales agent almost always does a very good sales job." Funn says. "But once you get into the weeds of developing the platform, the things that the sales rep promises don't always produce on the back end."

And it's important to remember that great technology alone does not an employee giving program make. [For technology to work its best, you need consistent support from your provider's support team](#) to ensure your program runs as intended. Ideally your support team should include a mix of experts across technology, customer service, funds management, marketing, and more.

With that in mind, it's important to ask questions — and get answers in writing — to ensure that you're getting the platform and support you need.

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Tracye Funn
Manager of Corporate Contributions,
Washington Gas,
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Questions You Should Ask to Make a Smart Decision and Ensure You Get the Most Value:

Software & Technology

- ✔ What comes out of the box and what will require custom development?
- ✔ If custom development is needed, how much of that is covered in the project cost — and are there [extra, hidden costs](#) that aren't included in the contract price?
- ✔ What happens when something goes wrong or the system goes down? How does the provider communicate about outages or other problems? What is its process for solving these problems?
- ✔ What is the reporting like? Does the provider offer real-time analytics? Are you able to customize and provide reports to other departments and leaders within your organization?
- ✔ How easy is it to make changes on the fly? If, for example, your employees want to give in response to a natural disaster, will you be able to quickly customize the platform to make it easy for them to do so?
- ✔ What security measures does the vendor take to protect your data — and your platform — from hackers, competitors, and others?
- ✔ What guarantees exist to make sure donations are processed safely and the money is managed properly? Are there ways to track payments and ACH/check numbers to help charities identify payments and properly credit donors?
- ✔ Does the provider have a ready-made list of pre-vetted charities from which your employees can choose? Can your partner easily integrate your list of preferred charities? How easy is it for your employees to request new causes or charities be added to the platform?

Partner Support and Services

- ✔ Customer support and service means different things to different providers. What kind of support does the partner's service offering entail?
- ✔ Is the vendor an established expert in the best practices of employee giving? What type of resources and support are available to you for improving your program?
- ✔ Do certain support services cost extra?
- ✔ When does the provider offer customer support? Does it provide off-hour or 24/7 support?
- ✔ Who is your key point of contact? Do you have a primary point of contact who you can turn to with your questions and for ideas on how to maximize your program's impact?
- ✔ Does the vendor provide additional support during launches or around key deadlines?

The Employee Experience

- ✓ What does the employee experience look like? Is the user experience quick, simple and easy-to-follow, or is it difficult to understand?
- ✓ What support and training will the partner provide your leadership and employees?

Migration

- ✓ Who owns your data about employees and their fundraising activities? A specific department in your company or the vendor?
- ✓ How does the new partner help you retrieve your prior employee giving history and make sure it gets properly integrated into your new platform? Will your previous vendor make your historic employee giving data readily available or will you need to take certain precautions to ensure you obtain all necessary data before informing that vendor that you are switching partners?
- ✓ How much customer support will you receive during the migration process?

References and Examples

- ✓ Is the provider willing to provide references?
- ✓ Can the partner provide examples of its work?

And finally, tap into your colleague network. If you know someone at another company that has worked with the provider and platform, don't be afraid to pick up the phone and find out about their experience.

Weighing the Costs

There's one more vital component to assess before you make your decision: **cost**.

Each provider will give you an estimated budget for your project — but it's important to remember that not all estimates are the same.

Some vendors will appear to have a higher sticker price — but actually provide a better value because they account for the full project cost and ongoing support in their estimate.

Others will provide a low base-cost for software, but charge you fees for transactions and services. And, in some cases, they can't deliver on some of the services you need.

Still others will offer your company a low base-cost, but charge a fee on the amount of money donated by your employees. If you're committed to promising your employees that 100% of their contributions will go to charities, you'll need to find a way to cover that fee — or find another solution.

As you're doing your due diligence — and asking questions — make sure you document all of the extras or potential hidden costs and factor those into your final estimate for the project cost.

- 7 This will help you make the best possible apples-to-apples comparison — and avoid sticker shock later.

[Download](#) our white paper for an overview of potential fee structure components to expect and a list of questions to ask as you assess your program needs.

America's Charities

Fees in Workplace Giving:



Selecting the Right Technology and Service Provider

Getting Started

We're not going to sugarcoat the process. There is a lot of legwork involved with switching employee giving partners and platforms. But the process doesn't have to be daunting if you take time to consider the questions and steps outlined in this guide.

If you ask the right questions up front, establish a reasonable process and timeline, and do your homework, you can make sure you're making a decision that aligns with your needs and your company culture — and gives you and your employees the experience they deserve.

Every organization is different — and has different needs. Workplace giving programs are equally diverse, and should not be treated as one-size-fits-all.

When it comes to choosing the right partner to work with for your employee giving program, your ultimate decision should rest on which provider is going to be your partner, and is the best fit for your needs.

Only you can decide which is the best choice.

If you are serious about finding a new employee giving partner and platform, be sure to include us on your short-list. Our full-service team and range of solutions means we fit your needs, not the other way around.

America's Charities brings to the marketplace a team of professional workplace giving and engagement advisors with extensive experience as nonprofit leaders and corporate philanthropy strategists. Since 1980, our collective experience and ability to provide the highest level of personal service and expert consulting to our clients has resulted in more than a half-billion dollars raised for tens of thousands of charities in workplace giving campaigns.

In addition to offering a suite of workplace giving technology options, America's Charities works tirelessly to meet our clients' needs. To ensure success, each of our clients gets a dedicated account representative to guide him/her through the workplace giving process from start to finish. From setting up and personalizing the online platform, to helping create a program, to vetting charities and managing funds, to reporting and more, each America's Charities client is supported by a full-service Client Engagement team, with experts in workplace giving, employee engagement, technology, charity vetting, funds management, and marketing to provide assistance as needed.

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Our first year with
America's Charities has been
so much easier than any year
with our previous vendor.
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Community Relations Director of a leading mortgage company

Make the Switch! Contact America's Charities for a Discovery Call to Assess Your Program and Needs.

One size does not fit all when it comes to social impact. We understand the legwork that goes into implementing and sustaining an employee giving program. Our 40 years' experience in this field has resulted in more than a half-billion dollars raised for tens of thousands of charities in workplace giving programs of all shapes and sizes. With a broad selection of employee giving software options, each paired with best-in-class services and proven practices, America's Charities clients have cut costs, scaled resources, and increased their results.

Request a call or email our team to discuss your organization's needs:



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Acknowledgments

We would like to give special thanks to Tracye Funn, Manager Corporate Contributions of America's Charities' client Washington Gas, for sharing her experience and expertise with us. This guide was written by Peter Panepento from [Turn Two Communications](#), with editorial direction by America's Charities' team, Lindsay J.K. Nichols, vice president of marketing and communications, and Sarah Ford, marketing director. Graphics were developed by Sarah Ford using artwork [designed by makyzz / Freepik](#).