Submittable

The Future of CSR Software: A Buyer's Guide
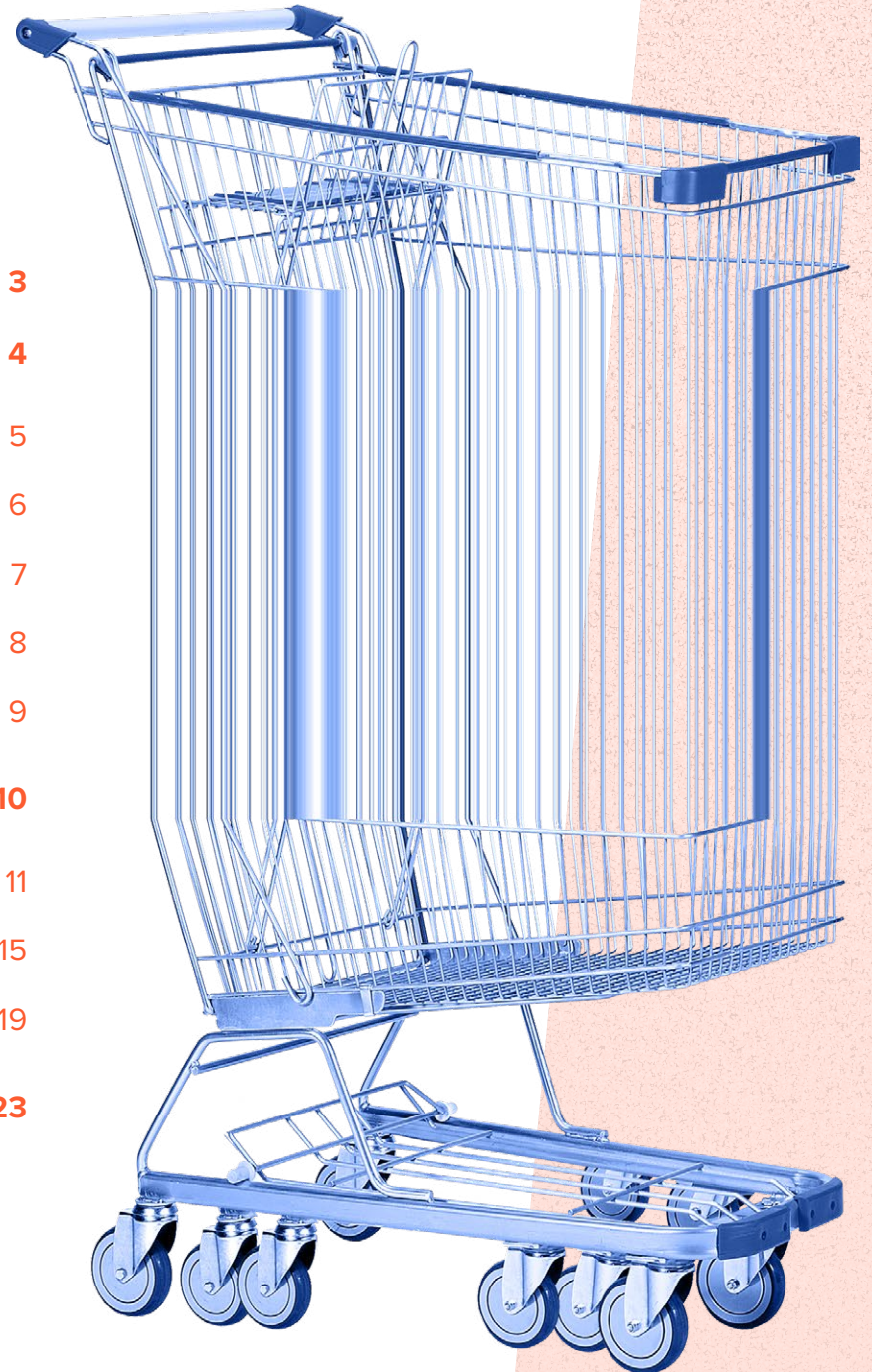
BY LAURA STEELE & JOHN SHIELDSMITH

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INTRODUCTION

As corporate social responsibility (CSR) programs mature, the technology that powers them needs to mature as well. In 2024, and beyond, CSR professionals will face new pressures, and they need technology that will help them live up to the increased demands.

Much of the pressure comes from employees and customers. In fact, **76% of employees** want their employer to make a positive impact in their communities. On top of this, 7**0% of customers** are more motivated to purchase from companies who take an active interest in improving the world.

This momentum puts pressure on organizations to **double down on CSR.**

But to meet these expectations, CSR teams need more support and resources. In 2023, **one-in-five CSR professionals** reported mental health concerns on account of rising job demands. Many of your teammates already have too much on their plate.

Good CSR software takes some of the load. It helps by making it easier to launch and track the impact of CSR programs. The right CSR software can also help you focus more on **practicing good corporate citizenship**, by removing the grunt work and making space for deeper strategic thinking.

And, as we'll get into, it's never been more important for CSR teams to think deeply and strategically about their programs. With the backlash against ESG, the rise of AI, and climate change impacting daily life, we're approaching an inflection point on how companies engage with the communities they're in. It's an exciting time, and your CSR software needs to match the moment. Before we get into the specifics of how, let's reflect on the trends influencing CSR practitioners today.

5 MAJOR TRENDS IMPACTING CSR TODAY

The borders and expectations around CSR mirror today's most pressing social issues. They are constantly evolving. The trends shaping CSR right now are redefining best practices and what "good" CSR software means.

#1 ESG backlash may bleed into CSR programs

#2 The "Catch-22" for CSR teams continues

#3 People want businesses to commit to social impact

#4 Rising pressure around climate change

**#5** Artificial intelligence is here and it's unavoidable

ESG backlash may bleed into CSR programs

ESG initiatives are facing ongoing backlash, but business leaders seem to continue to affirm their commitments, albeit with new terminology. This shift may bleed into CSR programs and change how business leaders prioritize and speak about CSR.

Recent legislation understandably affects business leaders' sentiment towards ESG. According to the Conference Board, **61% of companies surveyed** think ESG backlash will continue or intensify in the coming two years. That said, in the same report, the Conference Board also indicates most anti-ESG shareholder proposals fail to gain traction.

In the face of these shifts, a **Wall Street Journal article** recently reported that business leaders are moving away from "ESG" terminology, largely sticking to their commitments, and using different terminology, such as "responsible business."

Of course, **ESG isn't CSR**. But they're closely related, and however these shifts end up affecting ESG programs, CSR programs are bound to feel the shockwaves. These shockwaves may influence business leaders' decision to invest in CSR software and their requirements for that software.
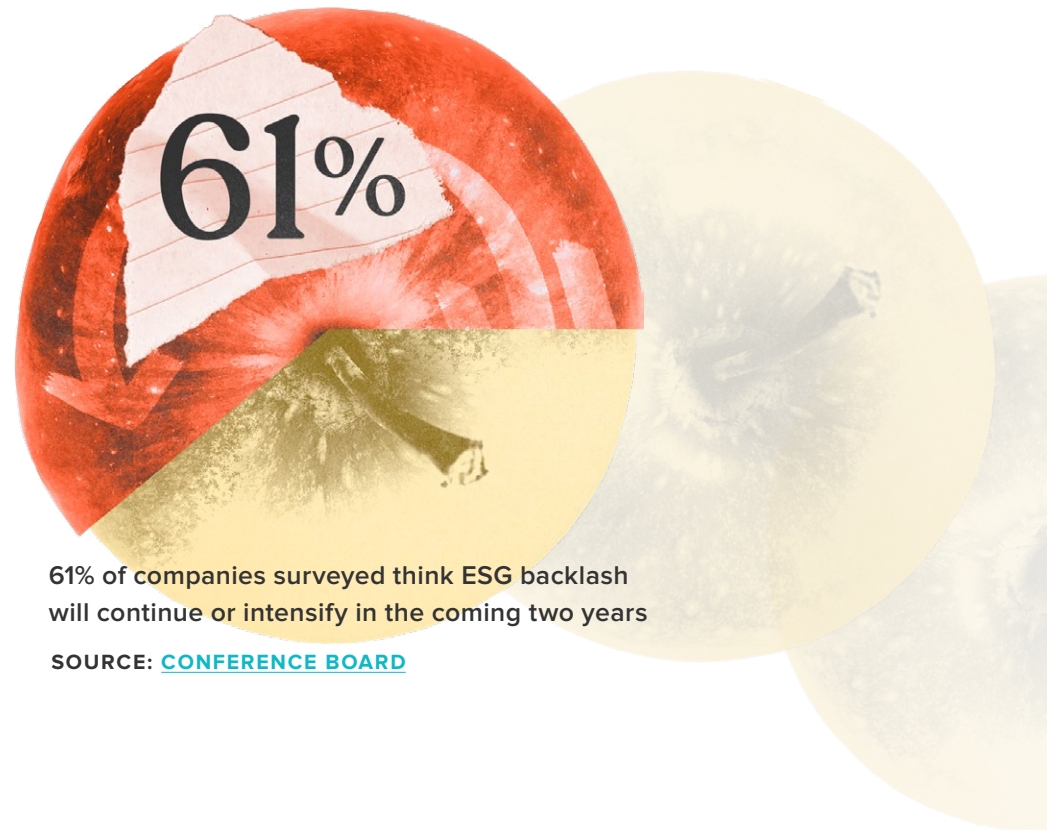
61%

61% of companies surveyed think ESG backlash will continue or intensify in the coming two years

SOURCE: CONFERENCE BOARD

#2

The "Catch-22" for CSR teams continues

In last year's report, we identified a "Catch-22," in which CSR is increasingly becoming a priority for businesses, but the budget and headcount don't match the intention. This trend continued throughout 2023, and will likely continue throughout 2024.

According to one 2023 study by the Association for Corporate Citizenship Professionals (ACCP), CSR teams felt c-suite leaders were more committed to CSR in 2023, which is reassuring. But these teams also reported these same leaders don't understand the role of CSR as well as they understand other concepts, like ESG.

As Caroline Berkowitz, CEO of ACCP, describes, this situation has the potential to lead to **a "starvation cycle."** This cycle begins when demands on CSR teams increase, but they're not given the resources to meet these demands.

For many, this cycle may become more intense in 2024, as ACCP's report goes on to show that 2023 was the first year we've seen an uptick in the number of grantmaking budgets declining. In 2023, 21% of CSR grantmaking budgets

declined, an increase from 14% in 2022. We'll have to wait and see if this trend continues in 2024.

When it comes to advocating for CSR software, it may help to contextualize it as a way to interrupt this starvation cycle and truly fix the Catch-22 CSR teams seem caught within.

How did your grantmaking budget change this year compared to last year?

Legend: ● Decreased ● Flat ● Increased
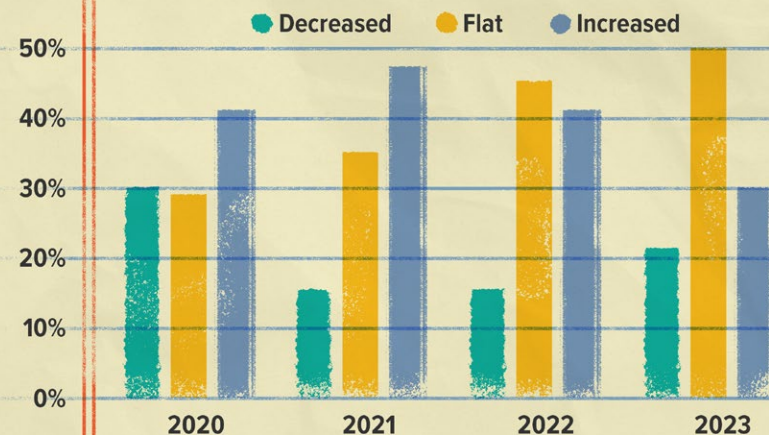
NOTE: 2021 DATA DOES NOT EQUAL 100% BECAUSE 3% OF RESPONDENTS CHOSE NONE OF THE ABOVE.

People want businesses to commit to social impact

Despite the ongoing pressure legislation and the Catch-22 situation CSR teams may face, everyday people still overwhelmingly want CSR programs. This may contribute to the increased demands on CSR teams, but it may also help you make the case for CSR software by highlighting the urgency.

We already know that **76% of employees** want their employers to align with their values. In 2024, Gen Z will continue to enter the workforce en masse, and they **expect companies do more** than simply turn a profit and hand over a paycheck. On top of this, **77% of consumers** are more likely to purchase from companies doing something to improve the world.

Employee resource groups (ERGs) are one result of these expectations. As of the publication of this report, **95% of organizations** have at least one ERG. Submittable also has a few, you can read about **how we've started our ERGs and how we run them**.

Between customers and employees wanting more from companies, CSR efforts will likely continue to gain momentum and importance in their organizations. CSR software will need to keep up with this demand and give everyone a way to participate.

Don't drop the CSR ball with Millennials and Gen Z

Master CSR for the future of the workforce today

GET THE GUIDE

#4 Rising pressure around climate change

Climate change is unavoidable—it's impacting daily life for people across the world. The general public now expects companies to be proactive about their environmental impact, and CSR teams are central to that effort.

We're at a tipping point when it comes to society's perception of climate change. **Seventy-four percent** of Americans say climate change is happening right now. On top of this, **two-thirds of Americans** believe large businesses aren't doing enough to combat climate change.

According to the 2023 ACCP study referenced earlier, environmental sustainability is the top social issue at companies with CSR programs. In 2024, this focus is likely to sharpen.

And yet, these trends don't match philanthropic spending. In fact, **only 2%** of philanthropic funding goes toward climate change efforts. As more and more people both take note of and see the effects of climate change, it will be increasingly important for companies to **prioritize this when planning CSR programs**.
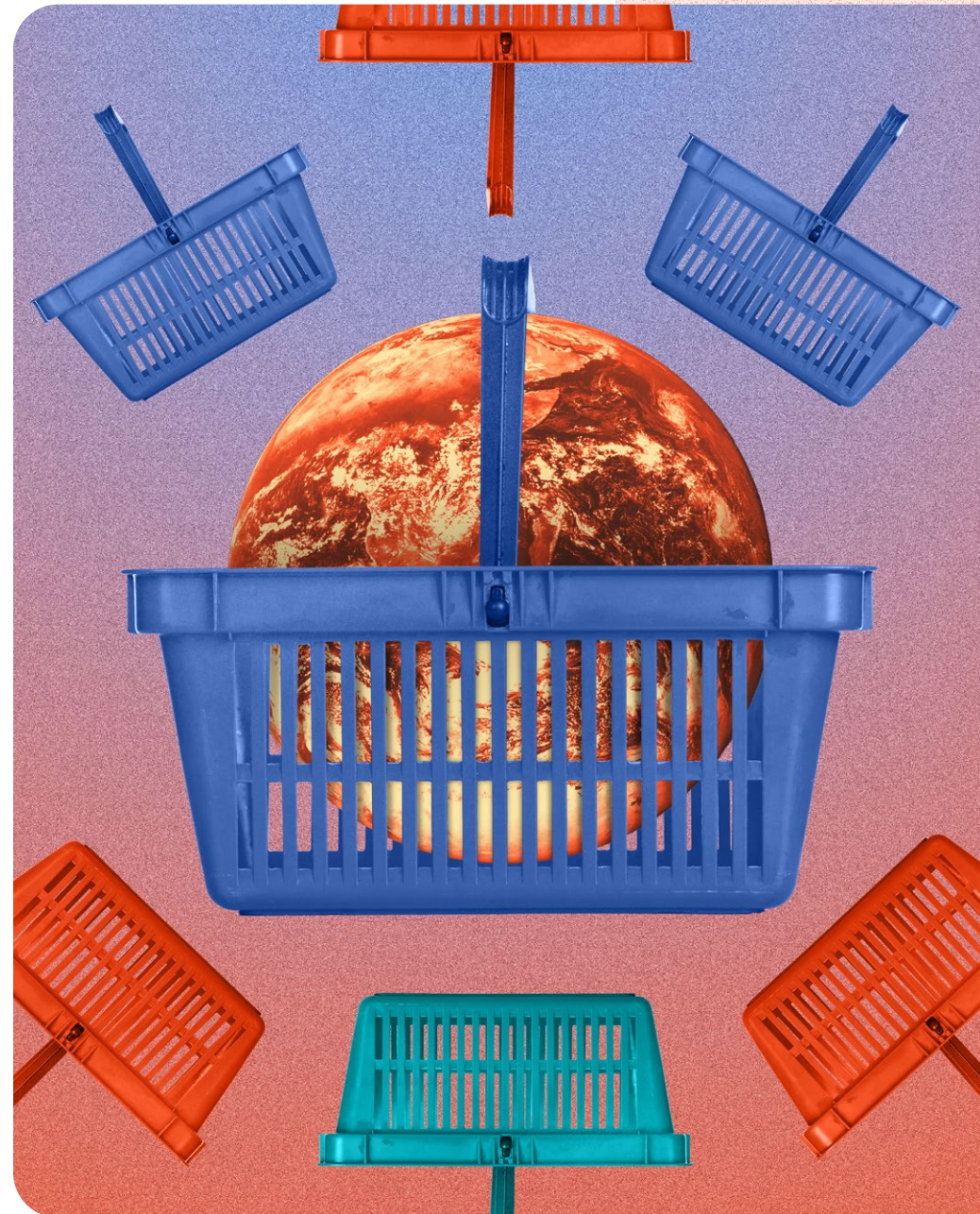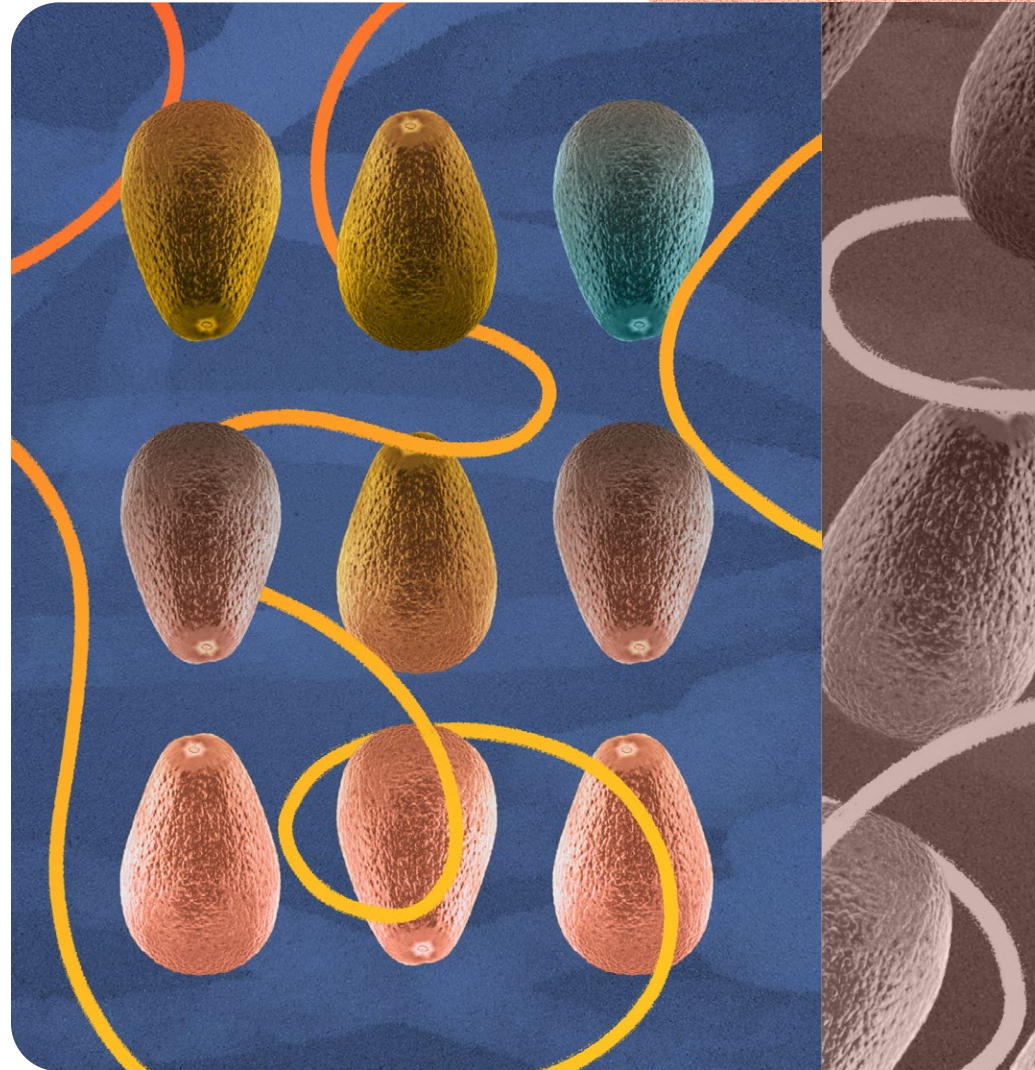
Artificial intelligence is here and it's unavoidable

AI is everywhere now, including embedded into CSR software. It's no longer a matter of if your organization will use AI, but how.

Already, AI is seeping into word processors, search engines, and more. It will become a part of everyday work in the coming months and years. Which means organizations need to think now, not later, about how they'll use AI in their own company. In 2024, your corporate social responsibility software will need to clarify its stance on AI. In 2023, we laid out our **responsible AI principles**, which we encourage you to read.

Recently, we expanded on these principles with **our AI hub**, which contains all our AI-related content and an invitation to participate in our AI research. In 2024 and beyond, you'll need to choose a CSR platform that's thoughtful and transparent with their AI use.

EVALUATING CSR SOFTWARE IN 2024

When evaluating CSR software, it's important to keep the above trends in mind and to think about the scope of your use case. Some CSR software is capable of delivering a very broad range of features, while others specialize to help companies with one type of CSR programs.

We break CSR programs up into three types:

Community investment: Grantmaking, scholarships, awards, and other community-focused efforts.

Employee volunteering: Efforts and initiatives driven by employee involvement.

Corporate giving: Company-fueled efforts that don't entail the same level of employee involvement.

Keep the following in mind when shopping for CSR software that fits your own use case. Making the right choice can allow you to **act quickly**, pivot on the fly, and get the most out of your CSR efforts.

A #1 feature for all use cases

No matter your use case, top-notch security is a must for any CSR software you choose.
The cost of the wrong software: Compromised data for millions of customers, as in the case of **Blackbaud's breach** in 2020
Ask yourself:

- Is the platform encrypting information?:

- What's the company's data storage policy?

- Are they SOC 2 Type 2 certified?

- Do they adhere to GDPR rules?

- What's their track record with customer data?

Dig deep and give security the attention it deserves. You and your customer's depend on it.

Community investment
SOFTWARE

It's not uncommon for community investment efforts—grantmaking and giving, scholarships, awards, etc—to require tons of paperwork and box checking, for both grantors and grantees. Ideal CSR software should streamline these processes and lower the applicant burden for your community.

The following features can make that a reality.

Workflow Automations

Look for software that has workflow automations that allow you to **automate tasks such as scanning documents or images and extracting and verifying information.** This can keep your team from getting bogged down with the busywork of manually opening, viewing, and cross checking each document. This can also make a huge difference if your team is understaffed, making their workloads more manageable and them less likely to burn out.

In the end, automation takes a whole lot of pressure off your team and frees you up to do more strategic work and focus on giving.

| | General Settings | Form Designer | Assignments & Notifications | **Review Workflow** | G |

Review Workflow

STAGE NAME	REVIEW TYPE	REVIEW FORM	AUTO-ASSIGN F
☐ Eligibility	Yes/No/Maybe Voting	Not Applicable	Virginia Rodrig
☑ Round 2	Custom Review	Round 2 Review	Multiple Team
uired	Not Applicable	Not Applicable
		Round 2 Review	Lynn Tanner

Review Type

Automate Review ⌄

Yes/No/Maybe Voting

Custom Review

Review Not Required

Review Not Required

◼ Built-in fraud prevention

Prioritize **built-in fraud prevention** with tools like **personalized knowledge-based authentication quizzes,** which require applicants to answer a few short questions about their personal and private history, or **identity verification tools** that match selfies taken in real time to government-issued IDs.

Features like these help you ensure that the money you send out reaches your intended recipients without creating extra work for applicants. Not to mention, fraud prevention will reduce the chances of eroding community trust through breaches or other costly incidents.

◼ In-app communication

Find a solution with in-app communication which allows **your team to communicate with each other and with applicants all in one place.** Having in-app communication means nothing ever gets lost in an inbox or slips through the cracks if people change roles. This feature links conversations directly to applications, ensures everyone has the access they need, and gives you one clear place to communicate and request additional information.

■ Collaborative review

Real-time collaboration and unique permission levels for reviewers are both must-have features for a modern CSR program. These features allow you to include outside stakeholders — such as subject matter experts or community members — in the review process without duplicating work or exposing sensitive information.

By enabling seamless collaboration, you streamline the whole review process. Plus, it sets you up to take a participatory approach by including outside voices in your decision making.

■ Two-way integrations

A robust two-way API integration that allows you to **share and access data across different software and databases** can go a long way to eliminating data silos. When data is siloed across different platforms or systems, it can be difficult to leverage insights effectively.

A two-way API allows funders to bring data from public databases or other sources into their grant management software and leverage it as they make funding decisions.
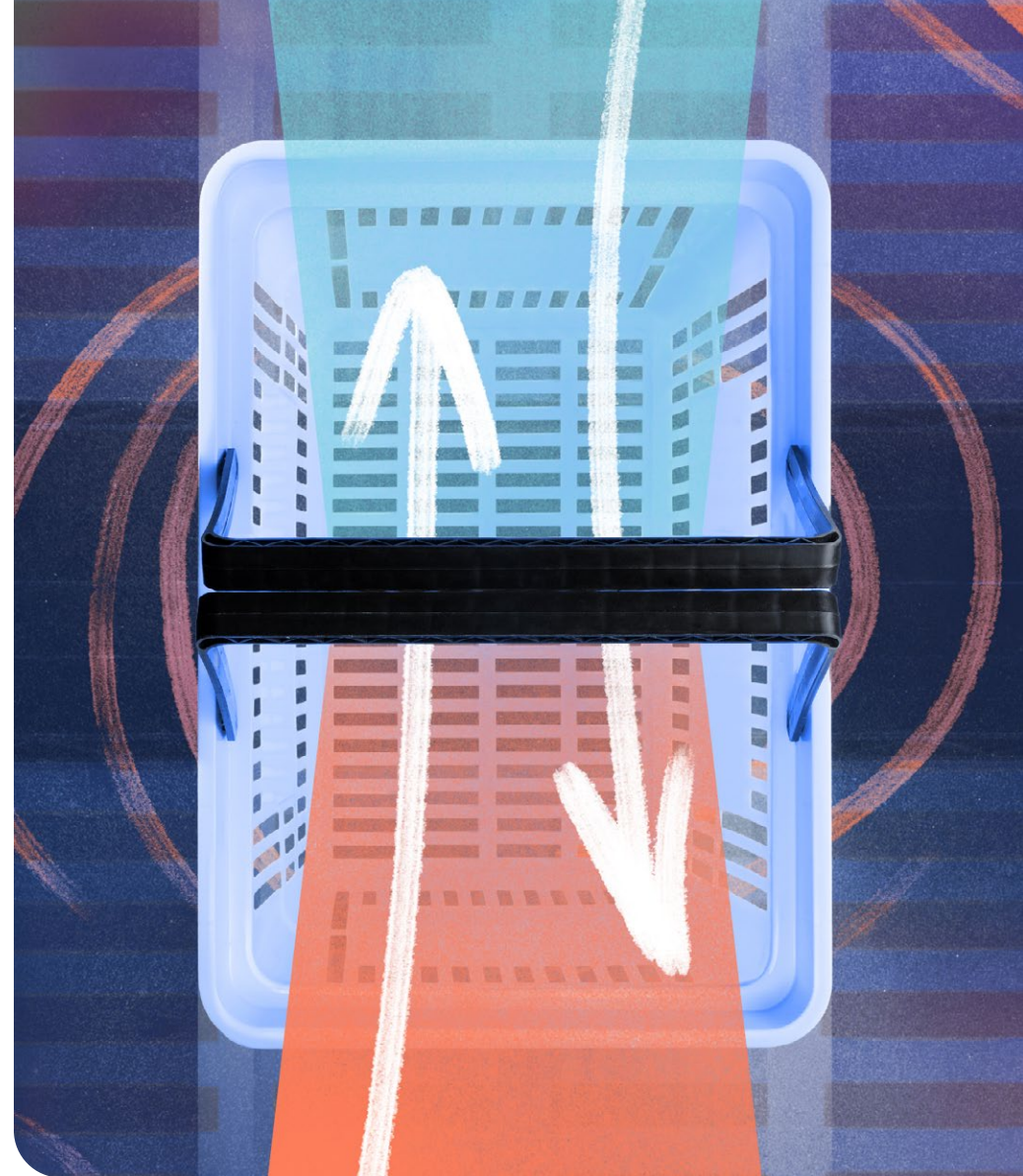
For instance, the **Demographics by Candid** initiative aims to provide funders with information they need about nonprofit staff demographics.

Funds tracking and distribution

Choose a software with **funds tracking and electronic funds distribution.** These features ensure that your team never gets wires crossed about budget and prevents grantees from waiting too long for funding to be delivered.

Funds tracking provides a single source of truth in terms of your budget with easy-to-interpret visualizations and a breakdown of how much of your budget has been awarded and delivered. Electronic payments get money in the hands of the people who need it much faster, as no one has to spend time generating and sending paper checks.

Impact reporting

Impact reporting that includes **both quantitative and qualitative** data is a baseline feature that good CSR software should always include. Capturing the expansive impact of a community investment program can be challenging.

With robust impact reporting, your team can tell the whole story of your program's impact with context and nuance. You can easily create data visualizations right in the platform and export them to share with internal and external stakeholders.
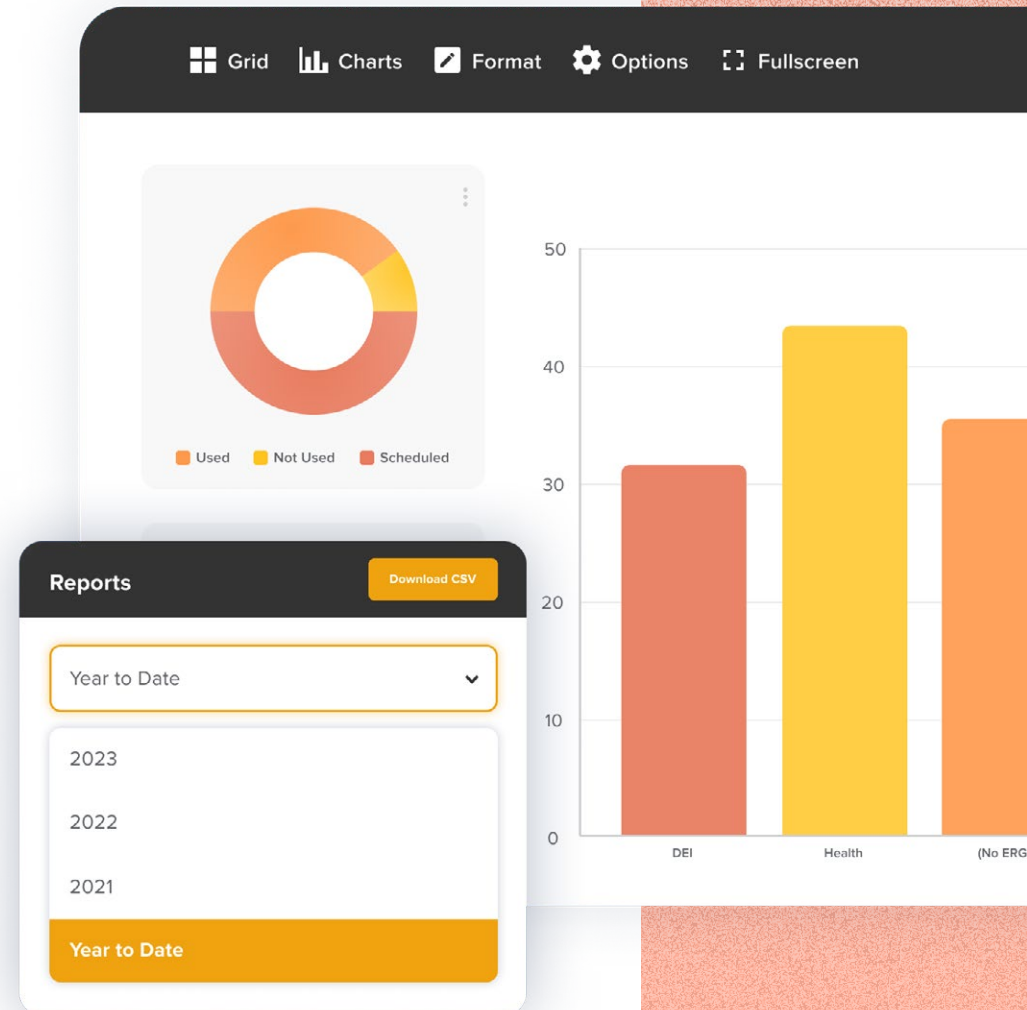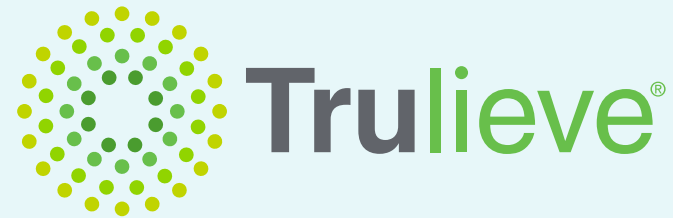
Employee volunteering
SOFTWARE

Employee volunteer programs are a great way to get your team involved in the community, foster team building, and give people a chance to connect with others in a way work doesn't normally allow. But, organizing employee volunteering efforts takes great effort, and getting them to actually sign up is another matter entirely.

The right CSR software should make it as easy as possible for employees to give back to the community and provide a home for ERGs.

Simple sign-up

Look for software that features **simple sign-up for volunteering.** Most employees want to volunteer, but too often the process to get involved is convoluted or complex. When that's the case, many people give up.

With simple sign-up, employees can **sign up for volunteer opportunities with just a few clicks.** This means a whole lot more people will get involved and stay involved.

Trulieve

Trulieve upped employee participation and logged 900 volunteer hours over 4 months because of Submittable's ease of use for employees.

Personal dashboard

Your CSR software needs to provide each employee **a personal dashboard where they can view and sign up for opportunities, log external volunteering hours, and see their contributions over time.**

Without a dashboard, volunteering can feel impersonal and employees can feel disconnected from the impact they make. A personal dashboard provides everyone with their own personal impact report so each employee gets a clear picture of how they are contributing to company-wide efforts.

ERG alignment

Seek out software that promotes **ERG alignment and input.** If employee volunteering is disconnected from the employee resource groups, you'll miss a big opportunity to harness the power of employee-led communities. With ERG alignment, you have a natural bridge between your volunteering program and your ERGs, which inspires employees to get more involved in both.
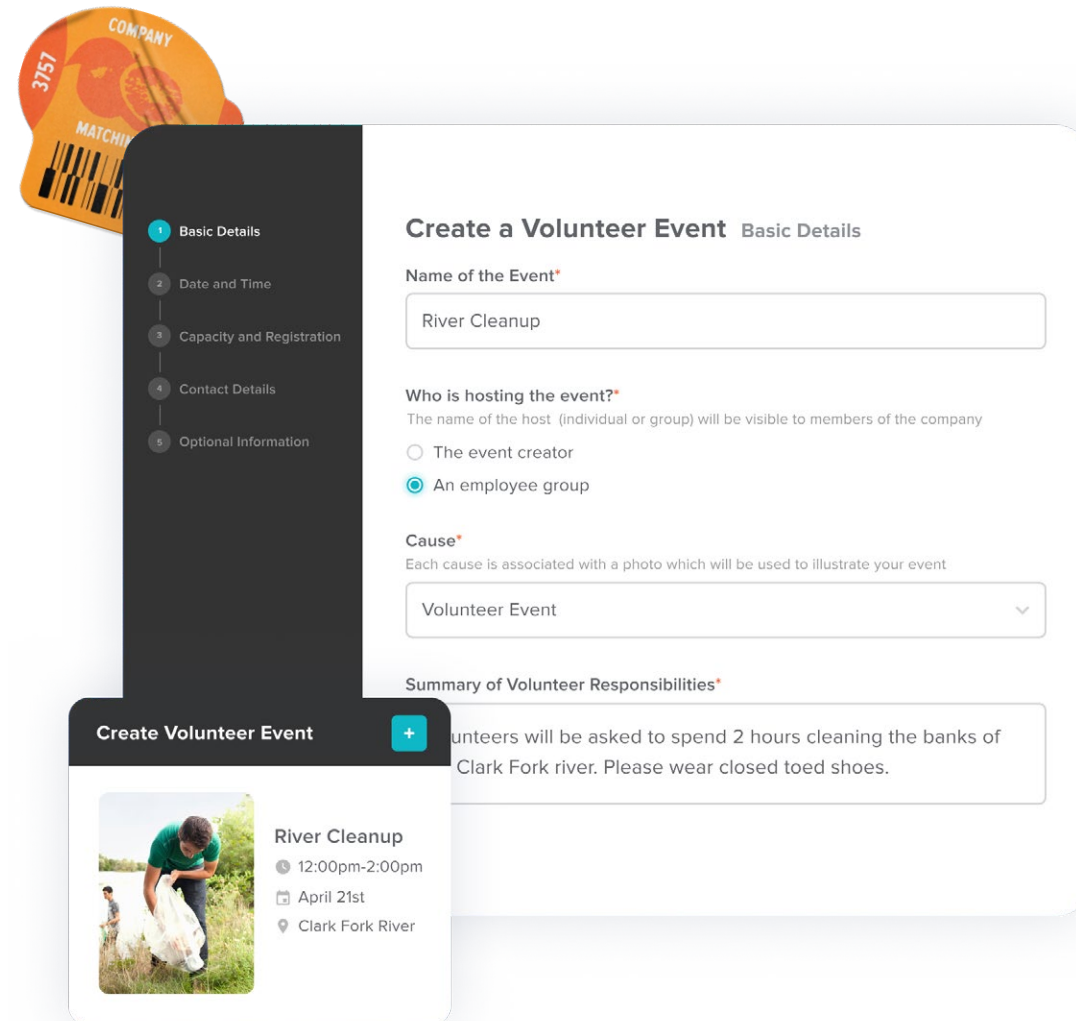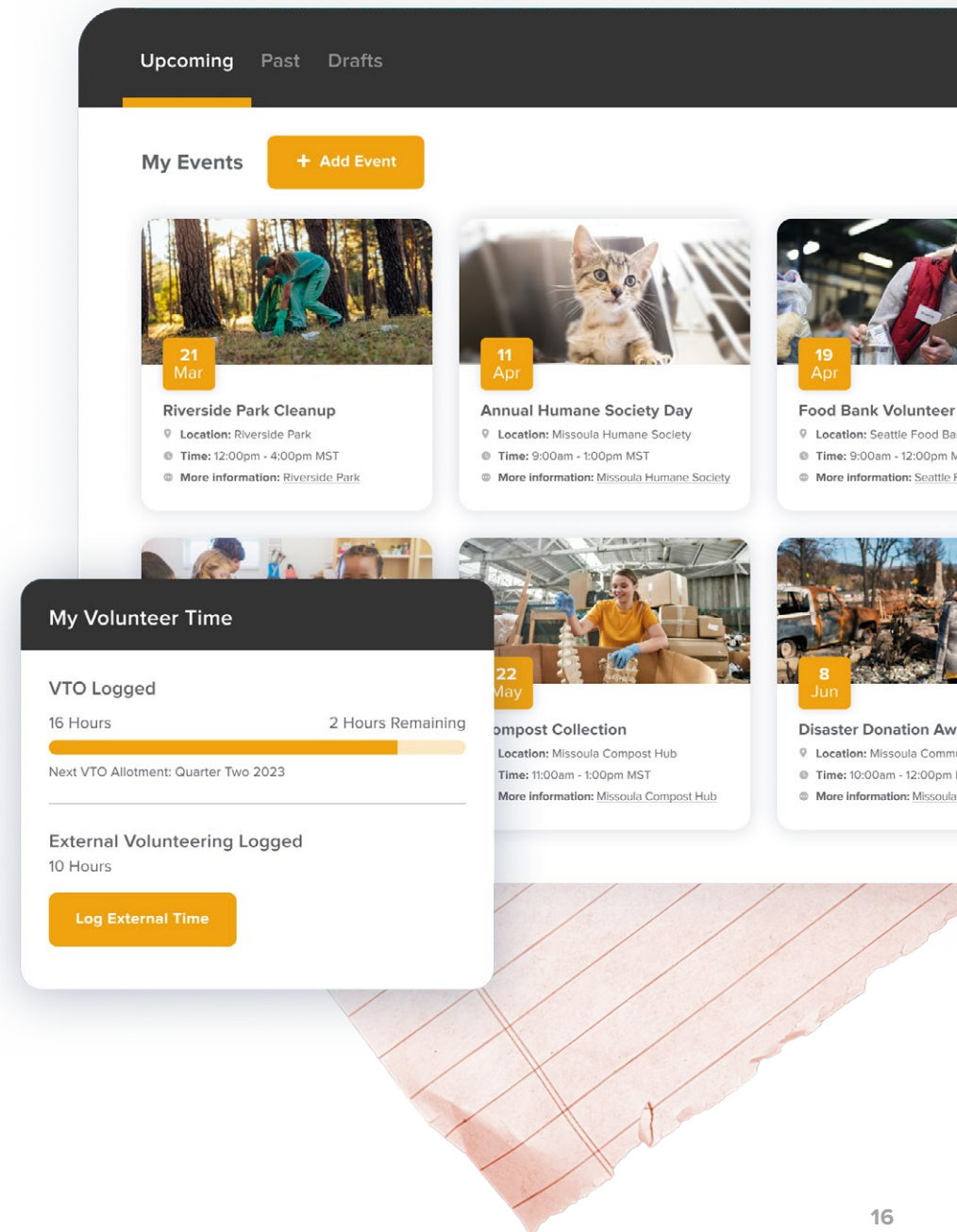
Event creation privileges

Giving efforts and events are usually covered in red tape, making it nearly impossible for employees to spearhead creation efforts. It's vital that your CSR software includes custom **event creation privileges.**

Asking your CSR or HR team to create every volunteer opportunity for your company puts a lot of work on them. Plus, it creates a top-down dynamic in which employees feel like company leadership dictates what causes they can give back to.

With event creation privileges you can empower all employees to create volunteer opportunities. This approach allows you to **leverage existing relationships employees have with nonprofits and tap into grassroots enthusiasm.**

Participant visibility

Give your employees **participant visibility,** so they can see **who has signed up for a volunteer event.** Often, first-time volunteers have trouble getting started. With participant visibility, you can leverage the social aspect of volunteering to help inspire more people to get involved.

Whether employees pack boxes, form strategy, or work directly with community members, the built-in collaboration of volunteering is a big part of the appeal.
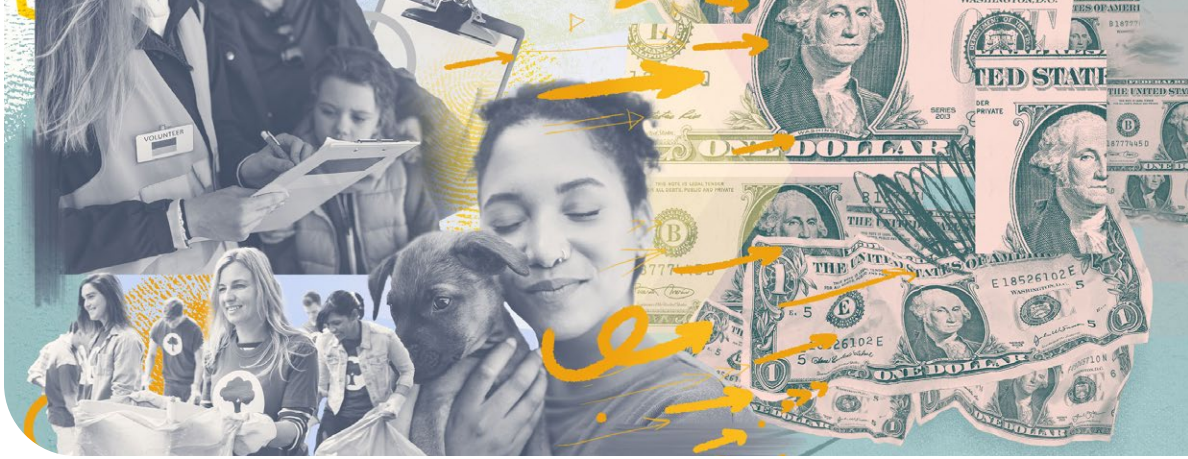
In-app surveys

Get feedback from employees **using in-app surveys.** A really important measure of your volunteer program is whether employees find the volunteer experience meaningful and worthwhile, and how their expectations align with reality. But it can be hard to get employees to take that extra step to provide feedback.

With in-app surveys, you have this feedback loop right within the platform, centralizing the processes for employees and increasing the likelihood they'll take the time to share their thoughts.

Automated waitlists

Every company dreams of having events so popular there's a waitlist. But, if that waitlist isn't automated, employees may not bother to sign up for it. If someone ends up dropping out last minute, that spot will be vacant and nobody will be notified of it.

Ideal CSR software **will automate the waitlist process.** With this automation, employees can opt into a waitlist so they're automatically notified if a slot becomes available.

Plus, a waitlist gives you the ability to gauge overall interest in an opportunity. If you consistently see long waitlists for specific events, you'll know it's worth adding more similar opportunities.

Dollars for Doers functionality

Dollars for doers, the act of pledging to donate a certain amount for every hour volunteered by employees, is a great way to get people involved in efforts. Manually tracking this kind of initiative can create a headache for your HR or CSR teams, however.

Find CSR software that has built-in Dollars for Doers functionality. This kind of functionality can allow the CSR platform to automatically track employee volunteer hours and match company giving without creating any kind of additional work for your CSR teams. And, it can give you great fodder for internal emails to your employees, motivating them to volunteer even more.

Corporate giving
SOFTWARE

Corporate philanthropy is less hands-on for the bulk of your employees, but can result in a ton of work for your corporate giving, HR, and payroll teams. With the right CSR software, you can streamline corporate giving efforts and even improve your future initiatives overall.

Automatic payroll deductions

Employees are more likely to **engage with a corporate giving program** if your CSR software can **automatically deduct their donations from payroll.**

Payroll deductions allow them to opt in once, or essentially set it and forget it. Employees pick the nonprofits and choose the amount and duration of their donations. Then they can easily make adjustments whenever they want to increase or scale back their contributions.

Donating to Big Sky Art Center November Drive

Your donation to Big Sky Art Center will fund our aim to increase accessibility to after-school art programs for K-12 students to create a vibrant and enriched community.

Big Sky Art Center

Payment Method
● Payroll Deduction

Company Visibility
● Show my name and donation amount
○ Show my name only
○ Show the donation amount only

Sharing with Nonprofits
○ Share my information with the benefit

Give $1,000

Total Donation $100.00

Donation Amount

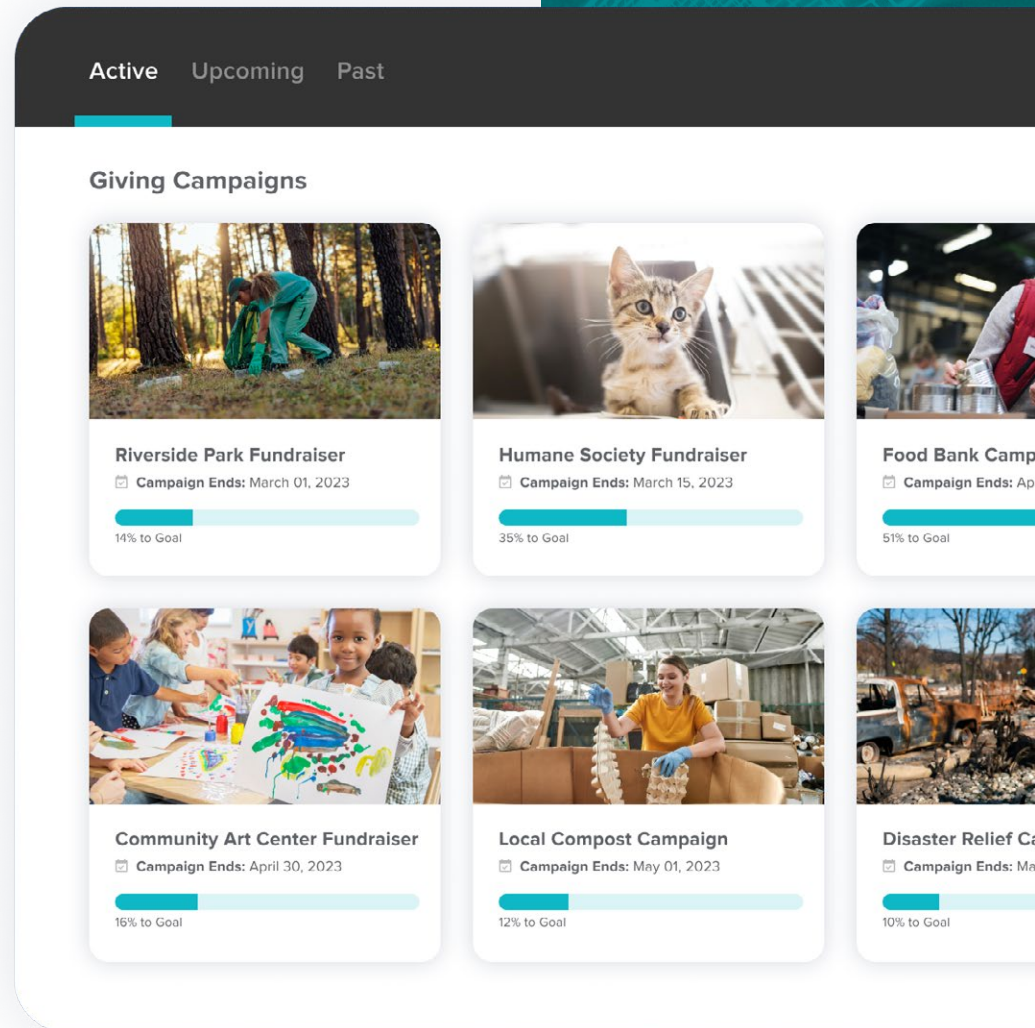You will be charged $100.00

Donate Now

Company matching

Matching donations can be a nightmare for your finance department, so look for features that **streamline company matching.**

Your CSR, finance, or HR team shouldn't have to spend time manually reviewing each donation match. Instead, it should be automatic. When companies match (or double) donations, **employees have the autonomy to give to the causes they care most about,** and in doing so they have a hand in directing company resources. It's empowering and inspiring, and often motivates who haven't given before to get involved.

Individual donation hub

Without the right data, it's easy for employees to feel disconnected from their giving efforts. With an individual donation hub, your staff can easily **track their individual impact over time** and see the difference they're making. This could even motivate them to give more, or give to other organizations. And, if you opt for a matching policy, you can include this information to the hub to drive home the collective effort.

Active   Upcoming   Past

Giving Campaigns

Riverside Park Fundraiser
Campaign Ends: March 01, 2023
14% to Goal

Humane Society Fundraiser
Campaign Ends: March 15, 2023
35% to Goal

Food Bank Camp
Campaign Ends: Ap
51% to Goal

Community Art Center Fundraiser
Campaign Ends: April 30, 2023
16% to Goal

Local Compost Campaign
Campaign Ends: May 01, 2023
12% to Goal

Disaster Relief Ca
Campaign Ends: Ma
10% to Goal

Database of vetted nonprofits

There are many great nonprofits out there. But, there are also bad actors, who are fraudulent or simply do less good with the funding they receive. The onus of finding a nonprofit to donate to shouldn't fall on your employees, as this raises the barrier to giving and could result in them not participating at all.

Be sure that the software you choose provides **a database of vetted nonprofits.** With a database built into the software, you can help employees **identify trusted nonprofits that align with their values** and save your team a whole lot of work.

Campaign creation privileges

Corporate giving can feel distant or disconnected for employees, as it's typically less hands-on than something like volunteering. One great way to help employees feel connected in this space is by letting them take the lead on campaigns.

A CSR platform should empower your employees with campaign creation privileges that **allow them to create their own giving campaigns.** This will help them feel connected to a cause, allow them to team up with colleagues, and invite coworkers to get involved. And, this takes the burden of creating campaigns off your CSR or HR teams, who can use that time to focus on improving your own CSR and DEI efforts.

P.S. **Looking for some corporate giving examples** to inspire you and your team?

Collective impact reporting

Collective impact reporting can paint a complete picture of your company's efforts — donations to each group, company matches, employee efforts over time, and more. Without collective impact reporting, employees may not understand how their individual contributions fit into the larger story.

Seek out software that includes collective impact reporting. **Collective impact reporting aggregates all individual giving into one company-level impact report.** This reporting gives your team a clear picture of your program's impact and provides the data and narrative you need to communicate that impact to stakeholders both inside and outside of the company.

Automatically generated tax documentation

Verify that software automatically generates tax documentation. You don't want anyone on your team stuck manually creating and sending documents. With automatically generated tax documentation, employees **get quick and easy access to any tax documents related to charitable donations.**

Multinational giving and volunteering

Having a multinational organization with offices located around the world can do wonders for your company's culture and overall skill set. But, multinational companies also face a more complicated financial situation when it comes to giving and volunteering. Different tax codes and currencies means more for your finance teams to handle.

Look for a CSR software that supports multinational giving and volunteering, with the ability to streamliner or automate finances. This can save your CSR and HR teams countless hours and ensure you're doing things by the book, while allowing you to focus more on what matters most — supporting communities.
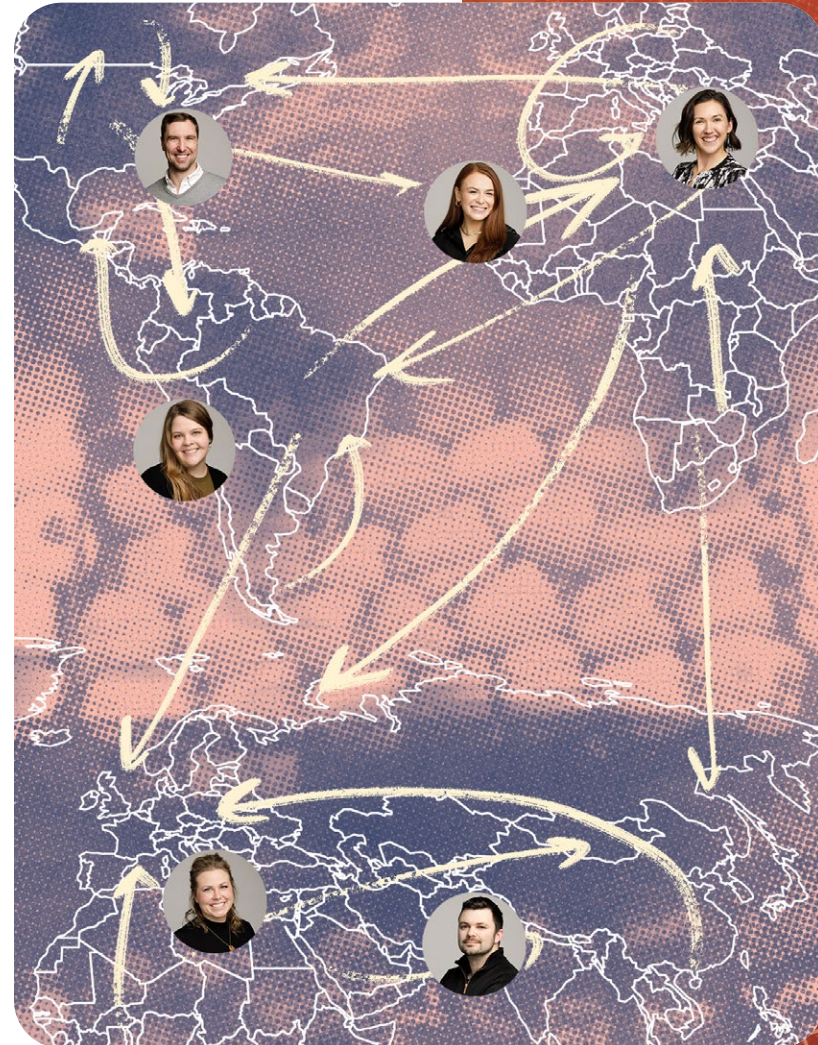
FIND A CSR SOLUTION THAT KEEPS UP

The trends that influence CSR are always evolving or changing entirely with each passing month. A great CSR platform can evolve right along with these changes. You need CSR software that keeps up with and even defines the trends.

Submittable is flexible, agile, and capable of keeping up with any changes the CSR industry can muster up. Our platform democratizes giving, making it easy for both leadership and your employees to create campaigns and affect change as you **scale your CSR efforts**.

But that's not all Submittable can do.

Don't let CSR software hold you back.

Choose CSR software that helps you focus more on giving, and less on checking boxes.

Talk to the giving specialists at Submittable today

Submittable can:

- **Automate review workflows** and save precious time
- **Streamline launch** with drag-and-drop building
- **Measure impact** with advanced, automated reporting
- **Simplify data** with personalized dashboards
- **Foster collaboration** with multiple users, internally and externally
- **Keep your community safe** with SOC 2 Type 2, HIPAA, and GDPR compliance

ABOUT THE
Authors

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