

A diverse group of six professionals walking in an urban setting, likely a city street or courtyard. The group includes a man in a dark suit and tie, a woman in a red dress, a woman in a black blazer and skirt, a man in a blue shirt, a man in a white shirt with a shoulder bag, and a woman in a blue dress. They are all looking forward, suggesting a sense of purpose and direction.

HOW DO YOU BUILD A CULTURE OF GIVING BACK?



Why do some companies have high employee participation in their volunteer and giving programs while other companies struggle to drum up any interest?

Over time, we have seen that high employee participation is rarely the result of any one magic bullet. Rather, plentiful employee participation springs from well thought out campaigns that include the following characteristics:

1. They're **tailored** to the strengths and needs of the company.
2. They're **flexible** enough to target employee interests.
3. They're capable of including **multiple office locations**, including international offices.
4. They make it **effortless for employees** to get involved, with perks like automatic payroll donations paving the way.
5. They offer **opportunities** for everyone.
6. They're **fun**.

Causecast client Optimizely knows a thing or two about high employee participation. While employee volunteering and giving rates typically average in the 25% to 40% range, Optimizely recently achieved **51% employee giving** and **85% participation** in volunteer programs.

WHAT IS OPTIMIZEZY DOING RIGHT?

First, let's take a look at the context and character of this company. Optimizely describes itself as the world's leading experimentation platform, enabling businesses to deliver continuous experimentation and personalization across websites, mobile apps and connected devices. The company is a mid-stage start-up, six years old, and not yet public. But giving back is baked into Optimizely's DNA.

Building a culture of social impact did not happen by accident.

Senior Program Manager John Leonard explains why the company feels a particular responsibility to give back even at a relatively early stage in the company's development. "As a technology company in San Francisco," he notes, "we're really at the center of an unprecedented concentration of wealth, knowledge, innovation and talent. And we're also in a place where there is a huge homeless problem. There are big, real challenges in education, the environment, and other issues that are all around us."

Leonard has been working at Optimizely for a little more than one and a half years, and he was surprised to hear that a lot of companies in the technology space don't engage in any charitable giving at all. He recalls one CSR person at a Bay Area tech firm telling him that the cost of living is so high in San Francisco that the company doesn't feel that they can ask employees to give back.

"I think that's a cop-out," Leonard notes. "If you're working at any of these companies, you make enough money to give something back to charity."

That said, Leonard recognized that Optimizely's employee base includes a significant number of Millennials who are both newer to the workforce and to the concept of corporate philanthropy. Encouraging these employees to participate in giving programs on a consistent basis was a daunting task.



"If you're working at any of these companies, you make enough money to give something back"



Leonard believes that one of the keys is to make it easy for employees to give back at work.

"This was a very important commitment for the company to make. Just the fact that we're organizing and encouraging employee giving is important in and of itself."

Leonard points out that while the company isn't in a position yet to give much money to charity, they do have incredible employees who care and want to give back with their time and skills.

"We want to make it easy and compelling for them to do so," Leonard notes.

HOW CULTURES GROW

There are so many reasons that a culture of giving back benefits the corporate “giver” as much as the recipient charities. Top employees — especially Millennials — are increasingly drawn to workplaces that foster a greater sense of purpose. It’s become a non-negotiable component of the modern employee’s job search.

Beyond that, a corporate culture that prioritizes giving back signals a value system that extends to the health of the entire company. Decorated military leader Donald Sutherland, who now helps companies transform their organizational cultures through his company, Sutherland Partnerships, defines culture as the intersection of values and behaviors — the way we think, act and interact with each other.

But most executives cannot even define their organization’s culture, let alone disseminate it throughout the company.

“As the Director of the *Center for Army Leadership*,” Sutherland wrote for *Huffington Post*, “I learned that culture bubbles up from the ground level. The CAL also stressed that an organization’s culture must be measured in terms of its style, performance and belief *from the perspective of the employees.*”

One of the lessons Sutherland learned in his military career, and which he now applies to his private practice, is that culture hinges on understanding what motivates employees. Other steps include understanding who can carry the desired culture throughout the organization from both the top down and the bottom up. And companies must hire people whose values align with the desired corporate culture.

Of course, the ideal of a unified corporate culture is hotly debated and analyzed. “In organizations, people interpret and contest values all the time,” Dr. John Traphagan wrote for *Harvard Business Review*. “The attempt to unify an organization by creating a “culture” is ultimately an exercise of power. People will react to that expression of power in different ways depending on the extent to which the values associated with the organizational culture resonate with their personal beliefs.”

Culture should of course not be perceived as a power play that beats employees into submission. But organizations that crave the community which comes with an aspirational culture can create opportunities for employees to opt into an ethos of higher purpose. And that expression can be a unifying and inspiring experience for everyone at the company.



Optimizely LAYS THE FOUNDATION

Optimizely's leadership was determined to create a culture of giving back, but how?

The company began by engaging Causecast for its online volunteer and giving platform and services, as well as Causecast partner *America's Charities* to help craft a program that adhered to best practices and established realistic goals.

Over time, Optimizely unrolled three different campaigns, each one building upon the next. Leonard knew that the Optimizely employees were extremely busy and distracted — "it's a technology start-up, after all" - but the Causecast platform made it easy for employees to volunteer and give back.

1 Getting Started

Impact Week was the first campaign that Optimizely **engaged in through the Causecast platform**, with volunteer opportunities ranging from cleaning up a park to serving meals at a soup kitchen to a hackathon, all serving 15 different nonprofits. By offering opportunities before during and after the workday, and encouraging healthy competition among departments, overall participation reached an **impressive 85%**.

The final event was the shortest in duration but the largest in terms of participation: an in-office kitting event for *International Medical Corps*. About 60 Optimizely employees gathered to assemble 500 kits to be sent to Nigeria, as part of International Medical Corps' polio vaccination program.

The lunchtime kitting event was perfect for employees who want to give back but are crunched for time. "Employees were able to grab lunch, listen to the presentation, do the kit assembly, and still be done in time for their 1pm meeting," says Leonard. "It was a way for us to involve people who may not be able to take that much time out of their day, and a terrific way for us to drive overall participation in our Impact Week."

2 Testing new features

Once Optimizely had test-driven Causecast's platform during Impact Week, the company made plans to further nourish a culture of giving back. After listening to the needs of employees when it came to volunteering and giving, Leonard recognized that the company needed to get creative about introducing giving to its employees.

Causecast worked with Optimizely to provide alternative ways for users to donate, such as payroll deductions and recurring donations. Implementing these donation methods on the Causecast platform would allow employees to make ongoing, smaller-sized donations to the organizations and causes they care about.



"If I'm going to ask them to take the time and make a contribution," says Leonard, "I want it to require the least amount of time and the fewest clicks, so it's as clear and straightforward as possible. People here are tech oriented, and they're mostly Millennials. If the experience wasn't seamless, I would hear about it."

All of these features were perfectly aligned with the company's first big employee charitable giving campaign, called OPTIGIVE. Causecast helped Optimizely set this up as a big end-of-year push to employees to either make one-time donations or set up recurring donations for the coming year. To test out the campaign functionality, Optimizely activated the features a few months before the OPTIGIVE campaign for a small campaign for earthquake relief as a way to get its payroll office and HR ready to handle OPTIGIVE.

Causecast helped Optimizely set this up as a big end-of-year push

"We didn't publicize payroll deduction for the earthquake relief campaign," Leonard notes. "We just used it as a way to start getting comfortable with how the system works."

3 Showtime

Optimizely's company-wide campaign included employees and nonprofits both here in the U.S. and abroad, which was meaningful because the company hadn't previously been able to engage their international employees.

To incentivize participation, Optimizely agreed to pick up all the fees associated with credit card and PayPal donations so that **100% of all donations went straight to charity**. Within the campaign, Optimizely was able to highlight a few different cause categories and feature specific nonprofits within each as suggested by community leaders in each region. This helped to guide users in selecting which nonprofits to give to, while keeping the campaign open

to all nonprofits on the platform. The rationale here was that many of their users are Millennials who are relatively new to the idea of corporate philanthropy and weren't totally sure of which causes or organizations to give to.

And Leonard communicated regularly with employees about all aspects of the campaign, both before and during OPTIGIVE. He remained focused on keeping the campaign top of mind for employees, reminding them to get involved if they hadn't already and updating them on progress throughout the campaign.





But Leonard didn't do this alone. He also engaged a council of employee ambassadors to help encourage participation throughout the company and tune in to the specific needs of different departments.

The results of this campaign were impressive. By enabling payroll deduction and recurring donations, and by employing a more deliberate and thought out strategy, Optimizely tripled the average contribution to its annual giving campaign over the prior year (\$55 to \$175), and total funds raised **increased sevenfold from \$4,150 to \$30,371**. Half of all donors chose payroll deduction and 25% made recurring contributions.

Leonard ensured that the platform offered something for everyone, with international organizations and local nonprofits alike. As a result, the campaign served as a great tool for connecting far-flung offices together for a common cause. The company **more than doubled employee participation** over the prior year (21% to 51%) and accomplished this with no company match. All this with 83% of Optimizely's employees being Millennials who are relatively new to philanthropy.

Optimizely tripled the average contribution to its annual giving campaign

The consensus amongst Optimizely, Causecast and America's Charities is that three factors were the primary drivers of the success of OPTIGIVE:

1. Allowing employees to donate to the **charity of their choice**
2. Encouraging **recurring donations**, including payroll deduction
3. Engaging **executives, managers and employee ambassadors** to promote the campaign

LEVERAGING CULTURE TO DRIVE THE FUTURE

Gradually, as Optimizely offered carefully planned events, more employees participated in each event.

"When they see so many of their peers volunteering and talking about it, when senior executives are volunteering and endorsing the experience, it feeds on itself," says Leonard. "The more people volunteer, the more it becomes second nature," Leonard notes. "It becomes an expectation."

Leonard has recently recruited a new team of employee ambassadors for 2017, comprising a council that will help plan all of the events for the coming year, including Impact Week. He sees clearly how Optimizely's increasing volunteer activity helps build giving back into the culture.

70% of employees say that these efforts made them feel more proud of their company

And as giving back has become more of a norm for Optimizely, the company has seen this reflected in the feedback it receives from employees. A survey that the company organized last December yielded a surprising number of responses around the social impact focus of the company, with 70% of employees saying that these efforts made them feel more proud of their company. One employee commented: "I'm so proud of Optimizely's commitment to helping others. So much so, it's the first thing I talk about when friends and family ask 'How's the job?'"

Leonard believes that Optimizely's burgeoning **culture of social impact helps attract the best employees** and also the ones that will fit into its desired culture. "We want to attract employees who have a passion for a lot of different things," notes Leonard. "We think that this culture helps retain employees, too." Optimizely's authentic culture of caring about its community and employees is one reason that the company has been recognized by the *San Francisco Business Times* as one of the best places to work in the Bay Area from 2014 through 2016.

As Optimizely's culture of giving back grows, this spirit is getting built into the company's business strategy as well. Optimizely is now offering discounted software to nonprofits across the country that enables them to test and optimize their websites to increase online donations, memberships and volunteer recruitment. Leonard notes that the sales department has requested that volunteering be integrated into the annual sales kickoff as well. "It's another sign that we're being **more successful with integrating social impact into the culture** and business of the company," he observes.





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