A VERSAIC GUIDE

# The Five R's

## of Great Philanthropy Program Management

versaic

We Manage Good

# Introduction

Great Philanthropy Program Management doesn't require an army of people or bundles of cash. Consider this example from Panera Bread, a company known for its generosity of spirit and strong brand.

More than 75,000 visitors go to the Panera donation request website each year. The company receives almost 20,000 requests for support. Every request receives a response and more than half the requests are approved. Each year, Panera donates more than 10,000 Bread or Bagels for a Year certificates for raffles at charitable events.

**One person manages the program. That's right. One person.**

**How does Panera do it? They follow the 5 Rs of good philanthropy program management. It works for them and it can work for you.**

# Getting From Vision to Impact

You have a clear vision for your company's philanthropy program, you know it will positively impact people's relationship with your company and you have a team of passionate people ready to make it a reality. You want your program to be as good as it can possibly be. You want to make an impact. So, how do you get from vision to impact as effectively and efficiently as possible?

## Philanthropy programs are not simple to implement. Does this sound familiar?

- Your company is inundated with unsolicited and unqualified philanthropy requests
- Requests are lost, forgotten or go to the wrong place. They don't have enough information or the right information. There are multiple copies of the same request floating around.
- The requests aren't organized so it's difficult to figure out which ones meet your company's criteria for review
- Requestors become frustrated by the lack of response or the length of time it takes to get a response
- There is no way you can keep up with all the follow up, tracking and reporting required

You know the saying "No Pain, No Gain." Well, forget it. Implementing your philanthropy program doesn't have to be painful. We live in a digital world and it is time to manage your philanthropy program in the 21st century. The automation train has left the station. Successful philanthropy programs take full advantage of the benefits of an online solution, including efficiency, consistency and flexibility, to name just a few. As program management has moved from paper to spreadsheets and email and now to the cloud, companies are able to spot opportunities, make better decisions and turn their donation programs into true brand-builders. With your philanthropy program online, you can focus on the five R's of philanthropy program management… and go from vision to impact just like Panera Bread.

# The Five R's of Great Philanthropy Program Management

**In school, we have the three R's — reading, 'riting and 'rithmetic — which make up the basic building blocks of our education. Without them, we would have a hard time being successful.**

Similarly, in philanthropy program management, there are building blocks that help us build a successful and impactful program. These building blocks are the five R's – receive, route, review, respond, and report:

**1. RECEIVE**
Standardize how and where you receive all philanthropy requests

**2. ROUTE**
From a single collection point, deliver the right information to the right people at the right time

**3. REVIEW**
Organize information for quick review, score proposals to speed up evaluation, filter out unqualified requests, easily obtain input from others in the organization

**4. RESPOND**
Automatically respond, whether you've made a decision, are still considering a request or need more information

**5. REPORT**
Use request scores to report results and demonstrate impact

**By following the five R's, you'll work smarter, not harder, and spend less time managing your philanthropy program with better results. Here's how to take your philanthropy program management to the next level.**

# Receive

## Get The Right Information…Every Time

Let me guess: You are inundated with philanthropy requests. Requests come from outside the company as well as from your employees. People call, send emails, fax, or send requests through the mail. Philanthropy requests are scattered like seeds in the wind throughout your company.

And, the quality of information about the requests? We all know how that goes. Sometimes there isn't enough information. Rarely is the information what you need to make a decision about the request.

**The way to solve these issues is to have all philanthropy requests come in through an online form. Everyone's now comfortable with filling out forms on a website. Want to give a company feedback? Fill out the form. Want to register for an event? Fill out the form. Want to ask for something? Fill out the form.**

An online form allows you to specify exactly what you need to know to make a decision about a request, so you get the same information for every request, every time. And, employees can be trained to direct requestors to the form to ensure they enter their requests appropriately. As a bonus, all the requests can be collected in one place. No more sifting through piles of telephone messages, emails, faxes, and letters!

A single point of entry also provides you with an invaluable opportunity to communicate your company values to the community and share the goals of your philanthropy program. You can clearly articulate your criteria for support, making it easier for community groups to determine if they fit those criteria. While you might find the number of requests increase, you'll find the requests that bubble to the top are more aligned with the philanthropy goals of your company. But don't worry. Your requests could increase a hundred-fold and still not require additional resources to manage.

**"Versaic's structured approach has provided us with a user-friendly interface to collect standardized information about each grant request. This has streamlined our review of educational and research-related grant applications. I've been very impressed with the Versaic system."**

**–Dat Nguyen, Medical Affairs, Auxilium Pharmaceuticals**

# Route

## Get Critical Data to the Right People in the Right Places

Once you have philanthropy requests in house, where do they go? Does the request need to be looked at by someone at the corporate level because it's national in scope or is a big request? Or should it be handled in a particular region or by a local store or office? Does it impact a particular brand?

So many questions. What you need is a way to ensure that every philanthropy request gets to the right place...every time.

**The simplest way to do this is to automate the routing of requests, so they get to the right person for follow up.**

Automated routing takes the guesswork out of where to send requests. No matter how complex your organization might be or how many philanthropy requests come in, an automated solution is the only way to be effective and responsive. Many companies have multi-tiered philanthropy programs where donations are reviewed and acted on at every level of the organization, from corporate headquarters down to community level operations. Each non-profit or community group requesting support from your organization is a valued constituent and needs to be treated as such.

Getting each request to the location or person best able to respond is critical to building those relationships. With an automated solution, there's no risk that an important request will end up buried on someone's desk.

**"At Anheuser-Busch, we take our commitment to being the Best Beer Company in a Better World very seriously. We have devoted significant resources to deliver on our Better World dream, including an extensive and growing range of successful programs and best practices that we are implementing across our business. The Versaic solution provides us a great platform to better achieve our outreach goals with community organizations that want to partner with Anheuser-Busch."**

– Vanessa Foster, Senior Director Community Affairs, Anheuser-Busch

# Review

## Make Better Decisions...Faster

Once you get the philanthropy request to the right person, the review process can begin. Does your organization require a committee to review all philanthropy requests? Is it just one person or several people?

The real challenge is how to make the review process, for one person or multiple people, as easy as possible. Starting with your company criteria for support, creating an automated pre-screening mechanism ensures that you can identify the proposals most closely aligned with your mission. Assigning numerical values to certain pieces of information regarding the request helps the review process go much more quickly and smoothly. Why?

**It is a lot easier to sort requests based on their value relative to your organization's philanthropy goals than to review each request in a vacuum.**

For example, if your organization focuses philanthropy efforts on youth education initiatives, then a request for support for an after-school homework program might get a score of 8 out of 10 for type of program. In addition, if your organization prefers to focus its philanthropy in communities in which it operates and the after-school homework program is located outside of your community sphere, it might receive only 2 out of 10 for location of program. Requests with overall scores that meet a predetermined threshold can be sent to the appropriate committee or team or individual for review. Assigning values to submitted information makes it easy for people to review philanthropy requests and make better and faster decisions. By identifying and acting on the proposals that best fit your goals, you'll have another critical opportunity to enhance your brand and make an impact on the communities where you do business.

**"We believe every sponsorship request deserves a fair evaluation and a timely response, and we simply outgrew our old processes for managing that. We knew we needed a system but we didn't know where to start. Versaic not only built the system for us but they anticipated our needs and made it easy for us to expand as our requirements grew. Now thanks to Versaic, our process is streamlined and keeps us well informed, so instead of spending our time doing paperwork, we are able to focus on making the best decisions and activating our partnerships."**

**– Lea Ann Stevenson, SVP, Marketing Director, Fifth Third Bank**

# Respond

## Building Relationships in a 24/7 World

We live in a world of instant gratification. We google a question and are instantly presented with multiple possible answers. We find something we like online, we press a button and purchase it right there and then…and, often, it shows up at our door step in a day or two. People who approach your organization with a philanthropy request have the same expectation of you. No matter that you have tens, hundreds, even thousands of requests to which to respond. They are only thinking about their request. They want to be heard and have little patience for waiting.

**Every community group, non-profit or individual seeking your company's support is an important touch point with your brand. Every reponse — or lack of response — reflects on your company. When you leave people hanging, you risk undoing the good your company brings to the community. Regardless of the outcome of the request, getting back to the requestor in a timely way is a golden opportunity to build relationships and show that your company values the interaction.**

How do you respond in a timely manner without pulling your hair out? First, set up an automatic response (within 24 hours) from your website that thanks people for their submission and lets them know that you will respond to them within a certain time frame. This acknowledges their request and sets their expectations regarding response time. With your preliminary scoring system in place, you can quickly respond to people whose requests do not meet your minimum threshold with a polite "thank you, but no thank you" letting them know that, while their work is important, it does not fit your company's philanthropy goals. All of these touch points are an opportunity to reinforce your brand values with your community.

**"At SUPERVALU, we have some of the biggest brands in retail grocery under our umbrella. Each of these brands is deeply involved in supporting their communities, as is our company as a whole. Versaic has enabled SUPERVALU to translate our passion and commitment into an organized system for engaging with our communities at the brand and corporate level. We are able to respond quickly and efficiently to the thousands of requests that we receive for support and also manage our commitments. With Versaic, we have more engagement and less hassle — a winning combination!"**

– Stacey Nelson-Kumar, Director, Community Relations, SUPERVALU

# Report

## Demonstrate Your Impact

Okay. You've invested time and money building your philanthropy program. You now have a central place for people to enter philanthropy requests, requests are automatically routed to the right person who scores them so that those requests that match your organizations philanthropy goals can be reviewed, and you respond quickly and efficiently to all requests. The big question to ask, is your philanthropy program working? Are you meeting your philanthropy goals? How many requests are received and how many are approved? How much money is being given away and how much time is being donated? How many people is your company helping? In other words, what impact are you having?

**This is where the rubber meets the road. The only way you'll be able to answer these questions is by having the data at your fingertips that let's you look at the big picture as well as the fine detail.**

Depending on your organization and industry, you may need to report to upper management, investors and even regulators. The good news is that the web form and scoring system you developed make it easier to analyze impact and report results. With a single submission portal for all philanthropy requests, you know how many requests are being received on a daily, weekly, and monthly basis. Your scoring system tracks how many requests are being reviewed and approved. Automatically requesting follow up data from non-profits you've supported after the donation or event will help you come full circle to report on the true impact of your company's philanthropy investment.

**"We communicate our impact in two ways — through data and stories. The data quantifies our impact and the stories help us understand the human and social value of our investments. Both are essential and Versaic's Impact Reporting delivers on both fronts."**

– Jennifer Walker, Community Relations Manager, Oakley

# Transform The Way You Manage Your Philanthropy Program


Learn more at versaic.com or contact Mary Ann Mullen, Account Manager, at maryann@versaic.com or 650-704-3040

**The five R's are best practices that will help you transform your philanthropy program management:**

- Standardize how and where you **receive** all philanthropy requests
- **Route** philanthropy requests automatically to the right person or department
- Assign values to philanthropy information to ease the **review** process
- Automatically **respond** to all philanthropy requests within 24 hours
- Use philanthropy request scores to simplify **report** results

To effectively manage your philanthropy program, you need to follow the five R's…so you spend less time managing the program and more time making a positive impact on your community.

**Now go out and do good!**