

Social Impact Insights

2023

Insights on Employee Engagement, Partnerships & Product
from Social Impact Teams and Industry Peers

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Overview

The Atlassian Foundation conducted research to inform a strategic refresh, which included interviewing **15 social impact teams** from other companies during May and June 2023. The hour-long interviews were semi-structured with flexibility to dive deeper on topics of interest.

Companies ranged in size between 500 and 79,000 employees (median 7,000), and in geography but with a significant representation from the United States. 10 of the 15 companies were Software-as-a-Service (SaaS) technology companies as we were particularly interested in insights from our peers in the sector.

Social impact teams from our interview group have a median size of seven people; however, where these **“Social Impact”** teams sit and what roles are on these teams greatly varies. Some teams included DEI and Sustainability, while others included Research & Development teams that serve their nonprofit customer segment. Teams that were part of the company rather than a separate philanthropic foundation reported into a wide variety of leaders including the CEO, Employee Success, Chief Marketing Officer, Chief People Officer and Investor Relations.



Interview content has been edited to anonymise company or program names and remove any additional identifying information. Supporting quotations from our interviews have been edited for length and clarity.

Employee Engagement



Summary & Insights

Insight #1

Success is being measured by more than just employee participation

While most organisations still track the percentage of employees who volunteer or donate, social impact teams are beginning to measure their employees' engagement more holistically. Some examples include:

- The proportion of employees who are using all their volunteer time-off
- Volunteer experience measured by annual surveys
- Employees involved in high-impact activities such as skilled volunteering
- Employees consistently volunteering with one organisation
- Participation in company-led campaigns or events



Impact Milestone Program

One social impact team is encouraging employees to change their behaviour with 20 impact milestones that fit into three buckets:

- Going deeper with fewer organisations
- Consistently volunteering with different activities
- Global collaborator moments

When employees hit 7 milestones, they unlock rewards such as eligibility to apply for grants and increased donation matching allowance.

Insight #2

Employee networks or affinity groups remain critical for scaling programs



Almost every social impact team we interviewed collaborates with [Employee Resource Groups, regional champions or councils](#) to deliver their programs. The responsibilities of these groups include making grants, organising volunteering opportunities and recruiting other volunteers. Some teams have added new [Affinity Groups](#) to add to their Employee Resource Groups and aligned them to strategic focus areas such as workforce development and climate resilience.

In regards to funding, teams are leveraging localised groups of social impact-driven employees to deliver impact in their own communities. Rewarding employees' advocacy on behalf of organisations they are passionate about helps to empower and engage employees to actively participate in their local communities and [be the change they seek](#). The common thread across all teams is that they are playing more of a support and empowerment function with decision-making being more decentralised, giving employees the autonomy to make the best decisions for their region.



Empowering ERGs

In FY22, one Foundation gave \$505,000 to 10 Employee Resource Groups, who developed partnerships with 19 local organisations. “They have the autonomy to select partnerships and the ownership is a great thing.”

Empowering Employees

“We have this global social impact council, which is made up of volunteer employees who have full-time jobs but are really passionate about social impact...for the past year, I’ve restructured the responsibilities of this group because I want them to have more ownership over the nonprofit partnerships. It’s cool – it’s like “you decide who we work with, who we grant with and who we volunteer with. Because you know your community best... you are the experts in your community. So work with people in your office and figure out what organisations are available and will get employees excited about volunteering with them.”

Insight #3

Skilled volunteering has many forms and remains difficult to scale



Popular skilled volunteering programs include [youth mentoring programs](#), [product support](#), [design innovation projects](#), [advisory and micro-mentoring for organisations](#). There is a strong trend of focusing skilled volunteering to support nonprofits or social enterprises in setting up the organisation's tech solutions/tech stack as opposed to solving any broad technology or business problem.

Some social impact teams have outsourced [capability-building](#) activities for their partners to other external organisations that are familiar with how nonprofits and social enterprises operate (e.g. [Social Lens](#), [Fast Forward](#)). This arrangement helps to get higher quality results and avoid the challenges that come with engaging and retaining volunteers. Few teams have scaled skilled volunteering to engage a large numbers of employees, partly due to lack of a suitable platform for managing projects.



Supporting customers with product implementation

Example: 12-week projects with 2-3 employees dedicating 40-60 hours

“Right now we are aiming for about one project per quarter with a nonprofit customer with the goal of either getting them started on our product or maximising their usage.”

Outsourcing “bite-sized” skilled volunteering

“We have so many smart, talented people that could be contributing way more than just like picking up trash at a river. Some employees do want a two year commitment but a lot of them don't... A lot of them want to show up for two hours. The partners that have done it really well, like Fast Forward or Trevor Project, have been those who are able to leverage the skills of our employees in bite-size packets.”

Insight #4

There is still demand for team volunteering activities; however, social impact teams are trying to be more “hands-off”

Several teams mentioned that as a corporate social impact function, they have a responsibility to engage employees in volunteering, which includes [team volunteering](#). However with limited resources, social impact teams are trying to play more of a [support and consultative role](#) rather than organising events for all teams across the globe. Exceptions are often made when a volunteering activity will contribute significantly to the team's overall volunteering participation target or when key executives are involved. Some social impact teams are leveraging third parties such as WeHero and Project Helping, but they note that doing so can significantly increase the “cost per head” of volunteering.

Impact and sustainability in team volunteering

“[Team volunteering] is an area that we're trying to get a little bit more hands off with, but if it's a leader who is coming to us, we will certainly step in to help. Otherwise, we will try and give guidance on what we think they should do, but ultimately set them free. We try and get people away from the stuff that feels either low on the impact scale or something that has a huge environmental footprint, like some giant assembly line activity.”

Insight #5

Incentives remain important for driving employee engagement and scaling programs

Most social impact teams we interviewed provide both volunteer time off (between 1 to 7 days per year) and a matching allowance for employee donations (between US\$1,000 to US\$15,000). Some teams will “unlock” more matching allowance when employees hit certain goals.

Other incentives include “seeding” money (mostly in Benevity) for every hour that an employee volunteers and entering employees into draws for larger funding amounts that can be donated to causes chosen by the employee. One organisation only seeds money for hours volunteered as part of their “coaching” program.



Volunteer Impact Awards

One team provides ten US\$20,000 grants to recipients of "Volunteer Impact" awards each year. Employees or teams submit applications for sustained engagement with an organisation that aligns to their focus areas.

Partnerships



Summary & Insights

Insight #1

Across all teams interviewed, most focus their philanthropic funding around education, climate, emergency response/disaster relief and workforce development

While there are subtle differences, social impact teams' core focus areas remain broadly aligned across peer companies:

- Education: Workforce development, innovative education financing, digital equity, economic opportunity
- Youth: Mental health and child welfare
- Climate: Humanitarian action, climate education, climate resilience, climate equity, disaster relief

Despite broad thematic overlap in many companies' missions, many teams still customise at least a part of their area which reflects their company's business and value proposition, i.e. allocating a portion of their funds to organisations working in cybersecurity or STEM education.

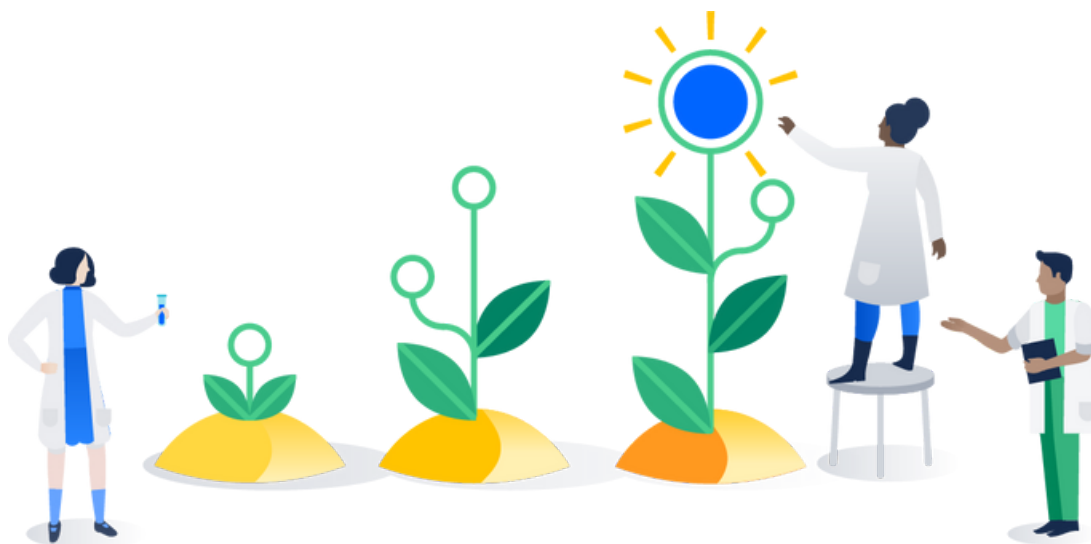


Proactive Philanthropy

It is common for many social impact teams to respond reactively in times of catastrophic environmental disasters or social injustice. In hopes to become a better philanthropic partner, one team noted that they are building more connections with grassroots organisations in order to proactively establish stronger relationships with those on the ground who are close to the communities they hope to serve in times of crises.

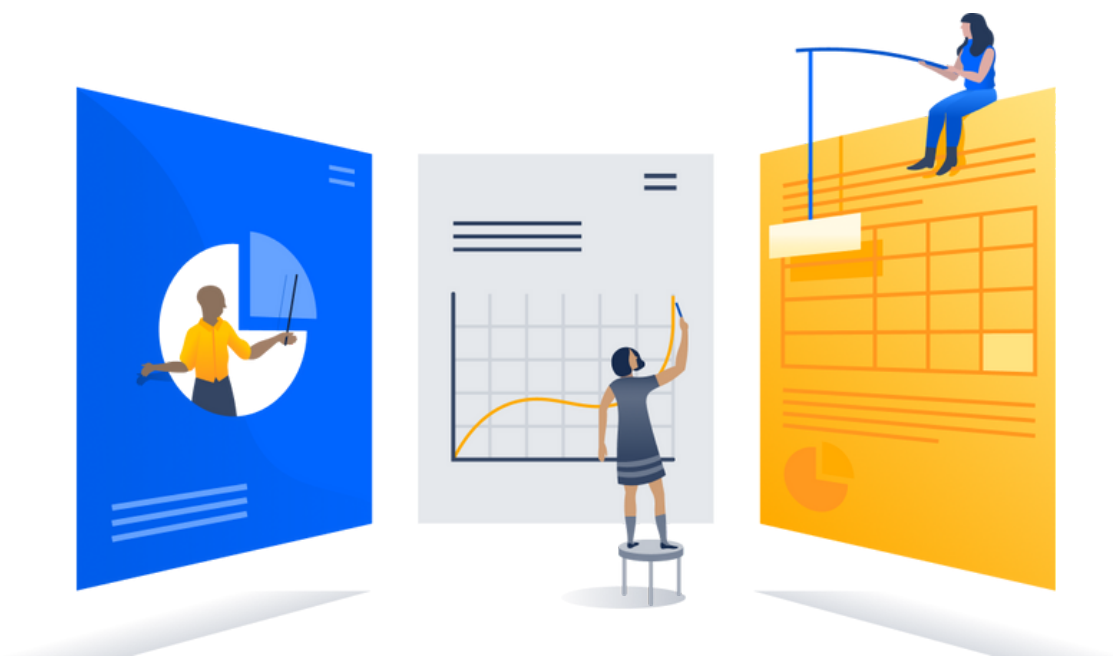
Insight #2

Social impact teams are prioritising partnerships with organisations that are able to take advantage of the full suite of company resources



In hopes to deepen their philanthropic impact with partners, teams have sought to implement an approach that goes "[beyond the dollar,](#)" i.e. where organisations that are in need of more than just funding.

“Wraparound” or “full spectrum” support via people expertise, products/IP and funding is becoming increasingly more common practice, but it is often still done with a smaller cohort of funded organisations due to its high-touch, partner-centric focus.



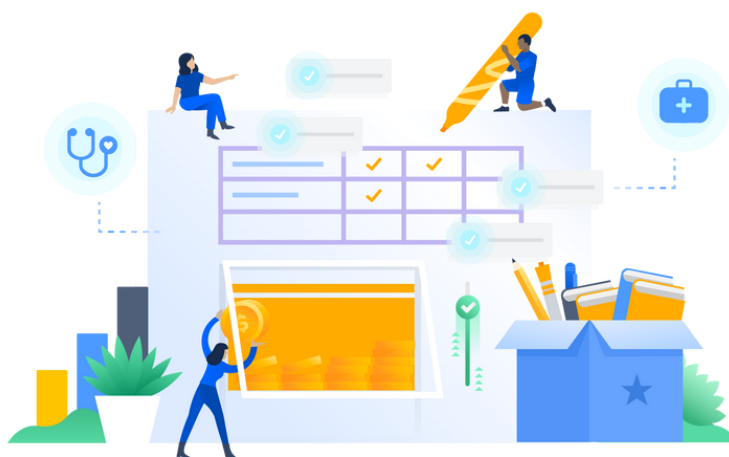
Enabling Capacity Building

Knowing that their partners were in need of [specialised support](#), two teams recognised that the only way to help improve their partners' capacity and capabilities was to bring in [external subject matter experts](#). Within their partner portfolio, they identified big areas of need and hired external consultants to come in to help their partners with things like fundraising, grant management and technology.

Calling their model "[engaged philanthropy](#)," one team noted that they have a virtual community of practice which brings together all of their partners with alumni partners. They noted, "It's sort of like a thought leadership showcase sharing of learnings. We also [coordinate] workshops based on [relevant] technology trends and [...] bring in experts [to] keep them thinking about issues that tech can obviously create."

Insight #3

Social impact teams' approach to partnership selection, funding and management varies



Partnership criteria, invitations to apply, funding duration, number of partners, amount of funding awarded per partner and total funding distributed depends entirely on the team.

- The majority of social impact teams do not have open calls for funding; instead, they source and intentionally invite organisations to apply.
- Annual funding distribution ranges from <US\$1M - ~US\$12M.
- Some teams invest heavily into a handful of partner organisations (only working with 3-4) at US\$100-US\$300K a year, while others manage a portfolio of partners as large as 60 organisations.
- Most funding is multi-year and unrestricted, enabling organisations to be empowered to use their money in any way they see fit.
- Most social impact teams actively own all aspects of the management of these high-level partners but some leverage volunteers to help organise engagements with these organisations.

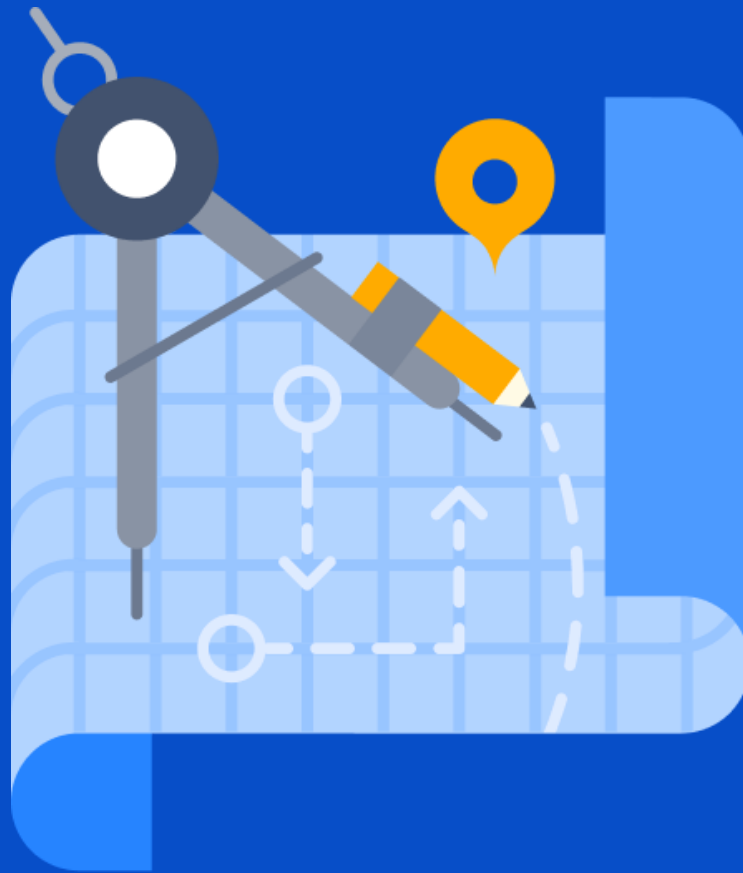
Trust-Based Partnerships

To remain aligned with their principles of community-centered and trust-based philanthropy, one social impact team made the decision to hand over all tasks associated with partner selection to an external third-party.

In this process, the third-party facilitator identifies individuals who have both lived experience and subject matter expertise within one of the company's focus areas to serve as advisors. These individuals serve as advisors to help to surface organisations who are doing incredible work within the areas and communities where the company is hoping to invest.

Once those organisations are identified, the group of advisors create a short list and then conduct a vote to determine which organisations will receive funding.

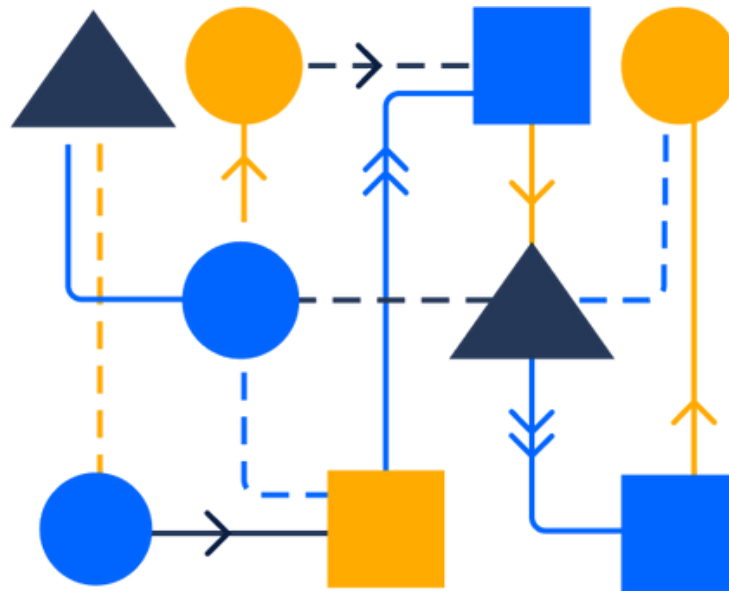
Product Impact



Summary & Insights

Insight #1

Teams are leveraging vendors to streamline product discount programs and pulling back on “built-in” support



Individuals we spoke to shared their journeys of bringing a more streamlined, automated approach to their ad-hoc product discount programs.

- Many social impact leaders have formalised and automated their product discount programs through partnerships with TechSoup and Percent.
- While the social impact leaders we spoke to are increasingly utilising service vendors to enable their product discount programs, three social impact leaders expressed the need for these solutions/partnerships to enable the product discount buyer experience journey to happen “in-house” as opposed to an external platform.

More social impact teams are expanding product discount programs to additional cohorts beyond nonprofits, including specific product discounting for sub-types of nonprofits (e.g. climate or health-care organisations), students teachers and educational institutions.

- Several social impact leaders have the target of providing product discounts to social enterprise organisations (i.e. for-profit social impact companies and organisations).
- Several teams we spoke to are providing product discounts to education institutions, students, and teachers are often equivalent to, and in some cases larger than, nonprofit organisation discounts.



Moving product discount programs “in house”

“And then for us, there were a lot more pros of managing it all in-house from a reporting and tracking standpoint. We can own that - we can manage and maintain that in-house, and we've been able to market it in a really easy and simple way. And, we've actually seen increases of orders the month we launched it being in-house. I actually don't really even know why that is, but it could just be a holistic experience for a customer, a nonprofit.”

Insight #2

The nonprofit customer cohort is viewed differently by companies, resulting in different and evolving metrics



In our conversations, we witnessed an almost even split between companies who manage their product impact initiatives and nonprofit product sales/enablement motions through their social impact function versus their Go-To-Market or Sales function. In many cases, [the two team functions work together](#).

For most teams, success metrics for nonprofit product programs focused on impact outputs including [nonprofit customer count](#), [product discounts distributed/granted](#), and [employee participation/volunteer rates](#), while for others, success metrics were simultaneously impact-focused and revenue-focused, combining nonprofit customer vertical sales targets with nonprofit product usage metrics.

Two individuals we spoke to work to align their **product usage success metrics with nonprofit impact metrics**. In doing so, they report on the impact their products are having on nonprofits' operations, effectiveness, scale/reach, by reporting (quantitatively and qualitatively) on how the products are being used by nonprofit customers.

Competing and Complementary Success Metrics: Impact and Revenue

"I would say internally, we [want to see] how we're doing from a sales perspective... [H]ow are we selling? What does our [churn] look like? What do the renewals look like? The software metrics that our executives have visibility into and wanna see how we're doing since it is a way to show that we can bring revenue into the business. And yet it's even at a steep discount. So internally, metrics that we will track and report out on [are] how we're doing year over year or quarterly as a business."

Insight #3

Increasing investments into nonprofit “Digital Transformation” initiatives have included product-agnostic technology support and a commitment to nonprofit technology equity



Several individuals we spoke to shared information on their internal initiatives to support nonprofit “Digital Transformation” and increased effectiveness of nonprofit teams through [tool adoption](#), [digital skill-building](#) and [growth of digital and operational capacity](#). Yet, the majority of these initiatives took a product-agnostic approach towards supporting nonprofit organisations with funding opportunities that are not contingent upon specific product adoption or implementation.

Insight #4

Amidst a macro-economic climate of cost cutting, social impact team leads are scaling back product impact initiatives and shifting program priorities



In our interviews, we repeatedly heard the refrain (in various iterations) of the [social impact team's desire not to be viewed as a "cost center" by the rest of the business](#). As a result of this expressed desire, several social impact leaders we spoke to have had to reconsider the "steepness" of their product discount programs and make cuts to roles within social impact teams that straddled the company's marketing and GTM functions.

In addition, teams are scaling back programs of “wrap-around” support previously provided to nonprofit product discount recipients at the time of product purchase/adoption. In multiple conversations, lay-offs and company restructuring have limited the social impact team’s ability to leverage pro-bono or GTM vertical support for nonprofit product customers.

Simultaneously, we heard several reports of social impact teams and GTM leaders investing more in “learning” and “training content” to support product selection and adoption for nonprofit teams.

Social impact roles, programs, and discounts on the chopping block

“... one thing we've had to communicate over and over again really intentionally this year is that we are also working with customers, right? We're not a cost unit.”

“Sadly the person who was managing [Program Name] when it went through this whole transformation, did incredible work, but was let go in the restructuring. We had to reduce the [Product Discount] amounts.”

Gratitude, Collaboration, and Continued Impact

We are thankful for the time & contribution from our peers and the Atlassian Foundation team in bringing these insights to life. We hope you find it impactful & valuable to your organisation.

If you have any questions or need additional info, please reach out to our Foundation team [here](#).

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