

**CASE STUDY SYNOPSIS: [How Optimizely increased its employee giving results sevenfold](#)****The Opportunity / Issue – [Thinking Strategically About Employee Giving](#)**

John Leonard knew his co-workers at [Optimizely, Inc.](#) are very generous. But he didn't realize just how generous they were until he saw the results of the company's most recent annual giving campaign.

The San Francisco-based tech startup, which makes software for website experimentation and personalization, had launched its first employee giving campaign in late 2015 as a way to help its employees give back to charity.

The initial effort did well — more than one-fifth of the company's employees chose to give. But when the company reworked the campaign this past December and branded it OPTIGIVE, employees responded in a huge way, said Leonard, who manages social impact at Optimizely.

The total amount of money raised increased sevenfold — and more than half of its 340 employees contributed. "It blew all of our expectations out of the water," Leonard said.

The difference? Optimizely got strategic.

**The Solution / Approach – [An Expert's Perspective](#)**

Prior to launching its new campaign, Optimizely worked with experts at America's Charities, taking advantage of its [Expert Advisory Services](#), to come up with a customized strategic plan to guide the program, which included recommendations for goals, structure, timing, and communications, Leonard said.

"The plan streamlined my process by sharing best practices and ensuring that I didn't have to 'reinvent the wheel,'" he said.

America's Charities strategic advice helps employers scale their program's more easily with the necessary resources to achieve giving, volunteering, and social impact goals. Expert Advisory Services include:

- **Strategy development** for measurable social responsibility and employee engagement programs
- **Evaluation and assessment** of social responsibility and employee engagement goals
- **Survey design and implementation** to include senior management input and employee feedback
- **Program analysis and alignment** of employer programs, nonprofit support, and employee engagement goals
- **Benchmarking** against competitors or companies for best practices, trends, and solutions

**Resources / Budget – [Tapping Into Existing Expertise](#)**

By working with [America's Charities](#), Optimizely didn't have to worry about building its program on its own. Instead, it could tap the expertise of a company that works with hundreds of companies and organizations who manage giving programs that benefit more than 10,000 national and local charities.

It was also able to work with an organization that has a turnkey system for collecting and processing donations from employees — and ensuring that those contributions reach the right nonprofits.

In addition to Expert Advisory Services, America's Charities offers a [comprehensive suite of workplace giving and employee engagement tools](#), different technology platforms to choose from to meet your needs, and funds management-only solutions, and more designed to help employers achieve their giving, volunteering, and social impact goals. In fact after switching to America's Charities' [all-in-one giving and engagement solution](#) — one of our clients experienced an **11% increase in their employee participation** between 2015 and 2016 alone.

## **Results to Date / Success Factors – Doubling and Tripling Results**

For Leonard and his company, the results exceeded their own lofty expectations.

The company kicked off the campaign with a happy hour party attended by more than half of the staff at its headquarters. At the party, senior executives volunteered as bartenders and collected more than \$500 in tips that were donated to three nonprofits who had booths at the party.

Overall, of Optimizely's 340 employees, 175 contributed to the OPTIGIVE campaign — a number that is particularly impressive given the fact that 85 percent of its workforce are millennials and are housed in offices around the globe. In fact, giving was strong across all global offices, with 56 percent participation in the London and Cologne, Germany, offices; 51 percent in the San Francisco office; and a whopping 89 percent in the New York office, Leonard said.

Not only did more employees give, they also gave more. The average contribution per donor more than tripled, from \$55 to \$175.

## **Lessons Learned / Surprises – Key Drivers of Growth**

Leonard attributed the growth to two key drivers — allowing payroll deduction and encouraging recurring donations. Half of Optimizely's donors chose to give through payroll deduction and 25% made recurring contributions.

Optimizely uses an online giving platform to make the campaign seamless and easy for employees to donate with just a few clicks.

“The campaign strategy from America's Charities provided the guidance I needed to really optimize our employees' charitable impact,” he said. “Now I have a roadmap to make next year's campaign even more successful!”

From basic donation-only campaigns or stand-alone solutions like strategic advice and funds management solutions, to supporting employee engagement and CSR more holistically through workplace giving, peer-to-peer fundraising, volunteering, volunteer grants, in-kind giving, storytelling, social media, and international giving, America's Charities helps employers of all sizes with their charitable giving needs.

To learn more and tell us about your unique needs, please visit [www.charities.org/portfolio](http://www.charities.org/portfolio), or contact America's Charities Vice President of Business Development Kim Young at [kyoung@charities.org](mailto:kyoung@charities.org) or 703-674-5358.

## **HELPFUL RESOURCES AND TOOLS - Employee Giving Program Check-Up**

Are you serious about taking your employee giving and engagement program to the next level? Get a quick and painless pulse check of your employee giving program, and brush up on the five steps to continually improve your program: <https://www.charities.org/pulsecheck>

## **ABOUT THE ORGANIZATIONS:**



Optimizely, [www.optimizely.com](http://www.optimizely.com), is the world's leading experimentation platform.



America's Charities, [www.charities.org](http://www.charities.org), inspires employees and organizations to support causes they care about. In our 35+ years as a 501(c)(3) membership-based nonprofit, we have raised more than \$675 million for more than 10,000 nonprofits. Our employer clients recognize on average a **10% increase in pledge volume year over year** using our services.