

CASE STUDY

NorthRock Partners



Bright Funds
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NorthRock Partners

OVERVIEW

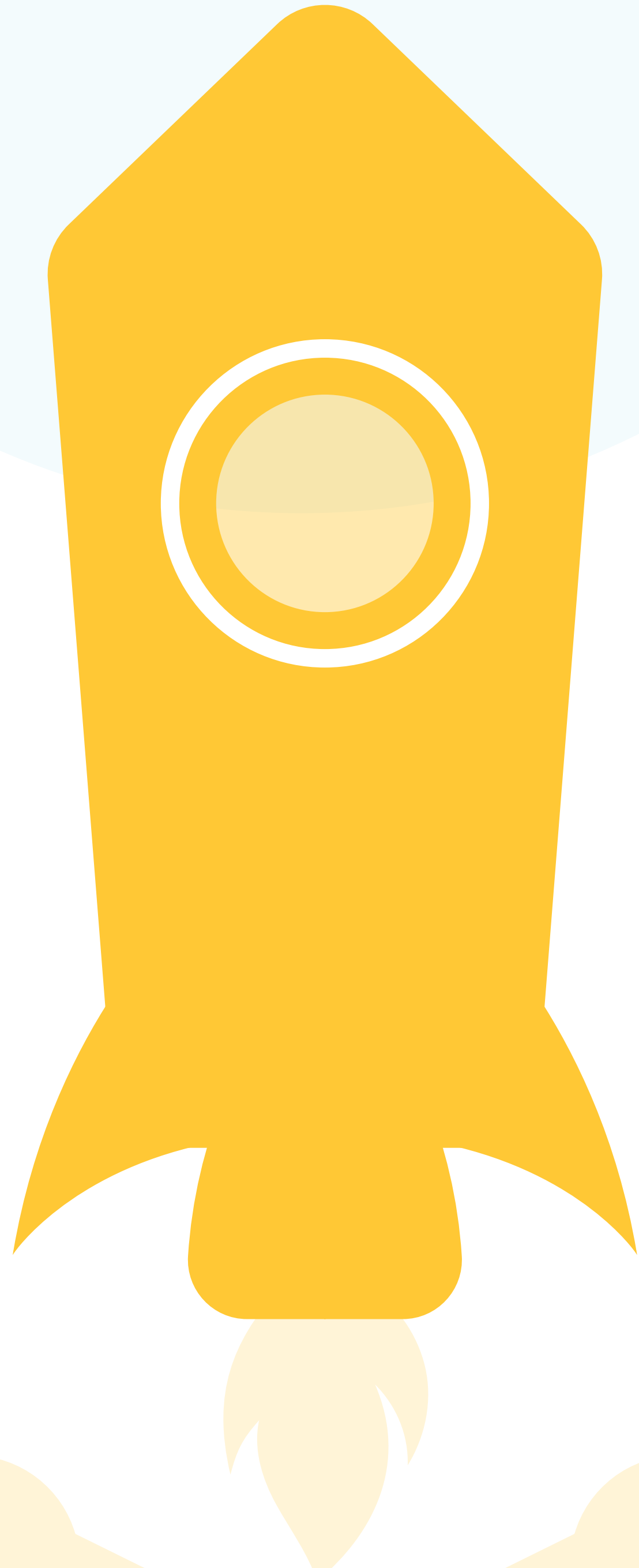


NorthRock Partners is a financial and lifestyle advisory firm that offers a holistic approach to helping their clients live exceptional lives. This same holistic vision of excellence has led NorthRock to create unique opportunities within their organization for team members to give and volunteer.

“We truly want the impact to be a collective understanding about how we can make a difference in the world by utilizing our numerous resources,” Shared **Leah Barr**, Senior Director for Social Impact at NorthRock.

“We look at it from an individual perspective as well as holistically. We define it as giving in a way that lifts up others and creates a more robust community for all.”

By making philanthropy more accessible for employees, NorthRock is paving the way for increased engagement at work and beyond.



Programs

When NorthRock launched its employee giving and volunteering programs in 2021, they gamified the initial engagement opportunities to get their employees involved right out of the gate.

Incentivizing Engagement

Using Bright Fund's giving credits feature, they awarded each employee a \$100 giving credit, with one lucky staff member receiving a \$1000 giving credit. Employees had to log in to the Bright Funds giving and volunteering platform to find out if they won, generating anticipation and engagement from employees and encouraging them to explore the new company initiative.





Corporate Donation Matching

NorthRock built on the excitement from the launch by offering employees many ways to get involved. Through the Bright Funds platform, employees were given help identifying and partnering with organizations that were personal to them and easily submitting for donation matches from the firm.

NorthRock has showcased its commitment to social impact and causes personal to its employees by matching individual contributions to non-profit organizations dollar-for-dollar, up to \$500 per year.

Skills-based Volunteering

The firm has further demonstrated its commitment to creating a culture of philanthropic giving and volunteering by providing training for volunteers through its board service and impact programs. These programs work to remove barriers to employee participation by cultivating internal connections around social impact to expand their passion into company-wide initiatives. The Board Service Program equips employees with board training and education to engage in the community through service on a non-profit board of directors.



Another way NorthRock has gamified employee involvement is by awarding employees who log 20 hours of board service annually a \$500 grant to support the organization they have partnered with.

Employees can also join the Impact Council, an internal group that meets bi-weekly to choose organizations that align with causes employees have expressed interest in and to develop volunteer initiatives and educational opportunities in those areas.





Timely Giving Opportunities

In addition to their ongoing volunteering and gifting initiatives, NorthRock offers events to keep employees engaged in philanthropy in creative ways. The firm initiates campaigns for urgent causes and features nonprofit funds to aid those impacted in crisis. In 2021, for example, NorthRock highlighted the Afghanistan Relief Fund and offered a two-for-one match to employees interested in giving. This bonus program motivated employees by enabling them to make a more significant impact.

Impact

NorthRock has witnessed great success since its programs launched in 2021. Its philanthropic giving and volunteering programs make a significant impact in the community while also reinforcing the company culture of individual and collective social impact

These programs have increased employee engagement and have acted as a beacon to attract top talent.





The numbers
speak for
themselves



The firm's Matching Gifts Program has been so successful that in 2022, NorthRock donated **\$15,000** in matching funds.





56%

of NorthRock employees **participated** in at least one program in the first three months after the employee impact programs were rolled out.

A large, 3D-style graphic of the number '98%' in a vibrant pink color. The numbers and the percentage symbol have a slight shadow, giving them a three-dimensional appearance. The graphic is positioned on the left side of the slide, partially overlapping a light blue circular background element in the top left corner.

98%

of employees **attended** the company's first Juneteenth event, which focused on reinforcing the company's philanthropic culture through service and education.

A Platform to Match Their Passion

A cornerstone of NorthRock's mission and company culture is social impact and employee engagement; marrying the two through employee giving and volunteering opportunities furthered both missions.

The only missing piece was a platform to make this easily achievable for administrators and easily accessible for employees. When the firm discovered Bright Funds' user-friendly platform with multifaceted engagement opportunities and a customizable interface, it was the obvious choice for a partner platform.

The one-stop shop for social impact and employee engagement

Barr calls Bright Funds the “one-stop shop” for all social impact and employee engagement programs. The platform made it easy for employees to find and give back to causes that were personally meaningful to them while simultaneously removing the burden on administrators to vet each organization. The platform made participation easy, and the built-in tracking and reporting capabilities made it effortless for administrators to report impact and identify new areas for the firm to get involved.



In 2022, for example, the firm added a program centered on matching time spent volunteering to support employees who wanted to maximize their impact but couldn't make financial contributions. NorthRock also continues creating larger company-wide experiences around its programs to keep levels of engagement high.

Within the first six months of 2023, over 54% of employees had participated in the company's philanthropic programs, which benefit more than 20 nonprofits.

NorthRock is a prime example of how to build programs that excite employees and maximize engagement in social impact. Barr notes she draws inspiration from the continued response to NorthRock's impact programs.



“It is incredibly energizing to see employees actively engaged with each other and their communities, all while wanting to learn more about the ways they can deepen their impact.”



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