

Session Summary

Using Data to Drive Goodness Strategies

Atlassian was not satisfied with only measuring program participation and wanted to find a way to get a deeper engagement measurement. Hear how they developed their program scorecard, which has provided deeper insights to inform future planning and empowered their people to take more action. Plus, find out how these new measures and plans helped Atlassian pivot more quickly and make more informed decisions in response to the COVID-19 pandemic.

Hosts

Tesa Pagulayan, Program Specialist, Social Impact, Atlassian
Laura Plantje, CSM, Benevity

Attendees

59 attendees

Key Takeaways

- Atlassian's initial focus goal was on the percentage of volunteer participation, but they realized the need to shift away from this one focus set. They moved to looking at the following for growing their program and goal setting:
 - **Holistic Engagement:** awareness raising for new volunteers, re-engaging employees, and giving participation
 - **Leadership Buy-In:** research shows that support from these teams leads to more active programs.
 - **Track Progress:** Creating goals that are measurable from the start
 - **Understand Data:** Used different levels of data to engage employees, allow employees to track their success, and check your hypothesis/plan part way through a campaign.
- Using data enabled Atlassian to increase participation, create a more engaged program and adapt faster to unexpected circumstances.

Session Notes

- Prior to the pandemic, Atlassian Foundation met for their annual planning and the team talked about how increasing participation rate every year is not scalable. There's a cap and they couldn't keep targeting 80% or 90% every year. By the time you reach a certain percentage, you're limited in how you grow (e.g., By 90% do we only grow 1% of a year?)

- At the start of the global lockdowns, their volunteering participation rate started flattening. It made room for the new strategies they were thinking of because if looking at volunteering, participation is not enough, what would be enough?
- The team talked about holistic engagement, leadership's buy-in and measurement.
- Holistic engagement is a more rounded way of looking at engagement because they are looking at three things: volunteering participation, volunteer hours and giving. The team indexed these levers: volunteering participation weighted at 40%, hours at 20% and 40% for giving.
- Leadership Buy-In. They believe that manager support encourages people to engage more on social impact activities, without fear that it might affect their work. With that, they rally different planning teams to embed social impact engagement goals, to their KPIs or targets, to show their commitment and their support.
- Measurement: Looking at data weekly, prior to an event and looking at data after, to analyze where the problem areas are and where they did well. Also looked at data to target teams with low volunteering and offering a personalized activity for their team. They are engaging Atlassians by creating a program that suits them and the organization best.
- To create this dashboard, they use the Benevity Reporting tool to get all this data and feed it into Tableau dashboards for different teams and employees to see. Teams use the data to create friendly competition among their leads to spark friendly competitions.
- As they move through a more data-driven approach, their participation has increased by a lot. It's also worth noting that they started using Benevity a year and a half ago. Which gave them access to more accurate reporting tool for social impact engagement.
- The data-driven approach has helped them create better engagement programs. They are able to prepare better for their programs and their plans and are more agile (e.g., If more Atlassians are engaging in skills-based activities, let's give them more opportunities to do so.)

Q&A Discussions and Conversations

- **How do you incentivize employees to enter their volunteering hours into the system?**

They ran a couple of different campaigns last year such as a treasure hunt (e.g., If you participated in a volunteering opportunity last year, be sure to log it in within a certain timeframe and you may receive \$10 seeded into your Benevity account)

The team always reminds volunteers to log their volunteering at the beginning, middle, and end of the events, especially during virtual volunteering, via talking to people and via Zoom chats

Check calendar invites to people who have signed up to volunteer but did not log in via Benevity

- **How did you share the volunteering dashboard? Was it using the Benevity spark platform or another method?**

They use the Benevity Reporting platform to pull the data into a Tableau Dashboard. They share the dashboard on Confluence and via their Slack channels.

- **Could you talk a little bit more about what your Dollar-a-Day program is?**

Atlassians can give a dollar a day out of their salary to their global partner Room to Read, it's set up automatically via payroll

- **How did you measure new volunteers? Did you account for new employees and contingent workers if applicable?**

On Day 1 onboarding new Atlassians, the team holds a Atlassian Foundation Bootcamp where they introduce the foundation to new employees. They run it for 45 minutes, 15 minutes of introduction, with the rest being a volunteering activity (e.g., card making for front-liners, design thinking project)

The next goal is to reengage them with another foundation activity in the near future.

They then look at the data to see the participation and reengage every fiscal year

- **How did you collect the data on retention and belongingness?**

Via the surveys they sent out.

- **Can you explain how you got leadership to agree?**

It was pretty easy as Atlassian executives are very supportive of the foundation. The execs have foundation-related KPIs. With teams who are not as active, the foundation team encourages them to add social impact engagement goals to their team's KPIs and targets.

- **You mentioned that you weighted the different components of engagement. What prompted this decision and how did you use this model.**

At the start, they knew they wanted to focus on participation, giving, and hours. They came up with the weighing by looking at the past fiscal years and assessed what the grades would be if they used the index in previous years.