This past year has been a catalyst for disruption and change for many people across the world. The COVID-19 pandemic halted our normal activities and changed the way we lived our lives daily. We also witnessed a revitalization of social justice movements that provided an opportunity to give a voice to under-represented communities. During this unprecedented time, Full Circle Fund (FCF) interviewed and surveyed over 100 local nonprofits, funders, and others in the FCF community. Their on-the-ground insights about community needs and opportunities highlight three critical strategic areas where the social sector needs support to continue to help those impacted by the pandemic. Those discussions led to the creation of a new funding initiative to help nonprofits Accelerate Social Justice in a Post-COVID World.

The Post-COVID initiative includes three focus areas:

- Economic Security Cohort
- Healthy Communities Cohort
- Equitable Education Cohort

Last fall, Okta, the leading independent provider of identity for the enterprise, took a leadership role to serve as Corporate Partner for the Economic Security Cohort – and the first company in FCF history to sponsor three Grant Partners simultaneously. As part of the investment by Okta for Good, the company’s social impact arm, each nonprofit received a $15,000 grant along with a dedicated team of Okta employees, selected for each nonprofit project. In total, Okta for Good donated $450,000 in estimated value including pro bono volunteer time and project management by FCF.

The FCF-Okta teams worked with three Grant Partners to support:

- small business entrepreneurs navigating the higher cost operating structures to adapt to COVID-related restrictions or safety practices;
- individuals and families experiencing challenges in saving for financial independence; and
- retail, hospitality, and other service workers whose work hours were significantly reduced or eliminated due to the pandemic.

The collaboration helped the nonprofit organizations develop strategies, unlock growth opportunities, and scale current and new ways to ultimately fulfill their missions and serve more people. Upon completion of the capacity-building projects, Grant Partners and volunteer Members completed a survey. Feedback and project highlights are included in this report.

“This is the ideal of how pro bono volunteering can work in service of community-based organizations. Most pro bono programs fail because the translation gap between the corporate and nonprofit sectors is too vast; you never get to the solutions. Full Circle Fund’s Accelerator programs work because they are expert translators – not only on the technical and operational issues, but on issues of power, privilege and equity. They serve as a bridge to enable a transformative experience that delivers real outcomes.”

Erin Baudo Felter
Vice President,
Social Impact and Sustainability, Okta
SURVEY: GRANT PARTNER RESULTS

FCF Impact on Nonprofit Capacity
To what extent do you agree with the following?

100% As a result of this program, my organization has increased its capacity to fulfill its mission.

100% As a result of this program, I have formed new relationships that will help my organization succeed in its mission.

Grant Partner Experience (based on three Grant Partners)
My time and energy spent at FCF:

100% Has given me important professional and personal skills

100% Has resulted in the development of some deep and meaningful professional and/or personal relationships

Based on your work with FCF, your organization has built capacity in the following areas (top responses from three Grant Partners)

- Technological product development (i.e. prototyping, developing apps that scale programs/impact for beneficiaries)
- Internal operations and management
- Evaluation and learning
Through the FCF initiative, I worked with Centro Community Partners which helps underserved entrepreneurs succeed. Their mission itself is inspiring and seeing entrepreneurs that had gone through the program talking about their journey was perhaps the turning point for me. To witness folks being able to start their dream, life-changing business despite COVID – and to see how proud they are about their work – it shows me the value of Centro through a different lens. I went from understanding Centro’s goal to SEEING the fruits of Centro’s work. It was truly inspiring to see an organization with such limited resources able to help people achieve their dreams.”

Stephen Lee
VP, Technical Strategy & Partnerships, Corporate Development, Okta
PROJECT SUMMARY: CENTRO COMMUNITY PARTNERS

Centro Community Partners’ mission is to build thriving communities by providing underserved, low-income entrepreneurs with entrepreneurship education, one-on-one business advising, mentorship, and access to capital.

Challenge: Help entrepreneurs discover and receive support from Centro as they start and grow their small businesses. The FCF-Okta project team focused on delivering marketing and recruiting support for its go-to-market app to increase downloads and usage among aspiring small business entrepreneurs during the pandemic and beyond.

Solutions: The FCF-Okta project team helped Centro think through how to create scalable ways to market and engage with entrepreneurs. Key deliverables included improved UI/UX (user interface and experience), small business case studies, partner marketing, new website images, app demo for potential users, app notifications for subscribers, and email campaigns to re-engage entrepreneurs.

Impact on Centro Community Partners mission:
As a result of the FCF-Okta team’s work, Centro estimates they will be able to:

- Increase the number of people served by its app by 50% (as a result of improvements to its app website, success stories, and the demo video).
- Improve its partner engagement efficiency by 60% (the demo video will eliminate the need for separate meetings for selling to new partners, then onboarding their team).
- Improve the number of conversion rates by 2x (keep people engaged through the end of the business planning activities on the app through app notifications, drip email campaigns for re-engagement, improved UI/UX, and new scorecard functionality on the app).

“Full Circle Fund matched us with a team of experts in marketing and technology to help us reach and support more low-income entrepreneurs. Thanks to their incredible effort to learn about our work, bring fresh perspectives to our engagement strategy, and create new outreach materials, we can reach clients we never would have had the capacity to engage with before”

Naldo Peliks
Chief Operations Officer, Centro Community Partners
**PROJECT SUMMARY: SAVERLIFE (FORMERLY EARN)**

**SaverLife’s mission** is to inspire, inform, and reward the millions of Americans who need help saving money. Through engaging technologies and strategic partnerships, they give working people the methods and motivation to take control of their financial future.

**Challenge:** SaverLife began using Okta products in Spring 2020 to protect its technology infrastructure, but needed additional support to roll out Okta to protect more than 20 web applications.

**Solutions:** The FCF-Okta project team helped to integrate SaverLife’s various technology systems with a goal to secure a SOC 2 Type II certification.

SOC 2 (System and Organization Controls 2), is an auditing procedure that ensures companies securely manage data to protect the interests and privacy of its clients. As SaverLife grows, larger, more security-conscious underwriters and partners, will require SOC 2 compliance.

The FCF-Okta project team provided best practices customized for SaverLife including security recommendations, password policies, sign-on policies, and more. Other key deliverables included a customized training video featuring Okta’s adaptive multi-factor authentication (MFA) features; pro bono professional services to assist with Life Cycle Management needs; policy settings review including modified password policies and session lifetime, single sign-on (SSO) for five applications covering a variety of use cases and scenarios; sandbox environment to ensure IT systems, such as active directory integrations, are properly integrated and tested; and compliance review to ensure updates would not negatively impact ongoing compliance operations.

**Impact on SaverLife mission:** As a result of the FCF-Okta team’s work, SaverLife was able to:

- Accelerate their SOC 2 certification, implement and audit SOC2 Controls.
- Allow the Chief Information Security Officer and Chief Technologist to work on high-value projects rather than administration tasks.
- Reduce IT resources for employee onboarding/offboarding by 50%.

“Great collaboration between FCF, Okta for Good, and our organization resulting in quick implementation. With the help of volunteers from Okta, SaverLife is expanding its use of Okta to protect all of its applications and users.”

George Manning
Chief Technology Officer, SaverLife
“Going through the Full Circle Fund program was truly transformative and unlike any other skilled volunteer program that we have previously participated in. The structure of having volunteer Team Leads who facilitated the process allowed us to focus on learning, building capacity, and the end product rather than volunteer coordination.”

Madeleine Case
Director of Product, United for Respect

PROJECT SUMMARY: WORKIT (AN APP BY UNITED FOR RESPECT)

WorkIt’s mission is to build technology to bring people together to claim the true value of their work, ensuring more safe, secure, and equitable workplaces. WorkIt is an app to help hourly job workers get fast answers to questions about workplace policies and rights from trusted, trained peer advisors. WorkIt connects employees to each other to share their experiences and can provide support and care. WorkIt Partners include labor unions and other worker organizations who utilize the platform to support their own base of workers.

Challenge: As WorkIt grows, it is imperative that its partners are easily able to access platform analytics to inform their strategy for supporting and activating low-wage workers. The organization lacked the staff capacity to complete a comprehensive analysis of their data sources, partners’ data needs, and how their data could most effectively be visualized.

Solutions: The FCF-Okta project team collaborated with United for Respect (UFR) to conduct interviews with WorkIt Partners to document insights and data usage trends to inform potential solutions.

Armed with their findings, the project team designed, built and tested clickable prototypes with partners and provided hands-on training for the WorkIt team to conduct their own discovery interviews, and usability tests.”

Impact on WorkIt mission: As a result of the FCF-Okta team’s efforts, WorkIt/UFR was able to:

- Increase their partners ability to activate low-wage workers (Improved Partner Portal usability and provided more actionable data on worker questions/needs).
- Reshape UFR’s understanding of what type of data analysis is needed to support their external partners.
- Build new feedback loops and processes that help WorkIt make more informed/timely product development decisions.
“FCF has expanded my view on contributing my time and efforts in a charitable way. It has given me the confidence and realization that I have more to give than monetary donations and physical labor hours. While those are helpful assets, and I will continue to contribute in that manner, FCF has helped me realize that my work experience is valuable to more than just my current organization, and sharing that knowledge with nonprofits can make a lasting impact. The relationships built with this type of partnership has a stronger impact as well, and carries well beyond a one-time instance.”

Jill Graham
Regional Marketing Manager, Okta
GET INVOLVED

When partnering with companies, FCF takes the impact area of their choosing, sources nonprofits, and carefully scopes projects to complement the strengths of their team, helps recruit the right employees, trains them to be effective volunteers, launches and manages projects, and then reports on outcomes. And...it’s all turn-key.

For over 20 years, members from the private, public, and nonprofit sectors work in partnership with local community groups to scale solutions to the biggest problems affecting communities. Through its unique model of engaged philanthropy, Full Circle Fund has unlocked over $12 million in positive social change.

Full Circle Fund is a 501(c)(3) nonprofit organization and community that leverages its professionals’ time, resources, and intellectual capital to accelerate nonprofits and build a better Bay Area. To learn more on how to become a Corporate Partner, Member, Grant Partner or supporter, visit www.fullcirclefund.org.

“FCF’s unique model provides a deep, rich experience for all involved. We appreciate the nonprofit partners being open to collaborate on pro bono projects with our employee volunteers. Since it was an all-Okta effort, our teams were able to work so much quicker with each other. For nonprofits, we are so excited that this is the beginning of the journey and to see how we can partner more deeply.”

Anna Currin
Manager, Social Impact, Okta for Good