

<http://www>

Campaigns at the Crossroads

Changing Direction:

Developing

Employee-Friendly

Workplace Campaigns

with Technology and Best Practices



The
Consulting
Network

Campaigns at the Crossroads

Changing Direction:

Developing

Employee-Friendly

Workplace Campaigns

with Technology and Best Practices



Copyright © 2006 by America's Charities. All rights reserved. Printed in the United States of America.
For information, contact America's Charities, 14150 Newbrook Drive, Suite 110, Chantilly, VA 20151.

Written by Stephen K. Greenhalgh
Edited by Cindy Coy, Rick Gondella, and Don Sodo

Book design by Rick Gondella

Table of Contents

Introduction	iii
About America's Charities	v
About The Consulting Network	vi
Study Participants	vii
Report Summary	1
Workplace Giving – A Valued Tradition	11
Workplace Giving – More Than Money	
A Fundraising Tool for Charity	11
A Component of a Corporate Citizenship Strategy	12
A Component of an Employee Relations Strategy	14
Benefits of an Effective Workplace Giving Campaign	14
Workplace Giving Environment	16
Employee Participation	17
More Opportunities to Give to Charity	18
United Way's Decline in Workplace Giving	19
Impact of Technology and Growth in Electronic Campaigns	20
Expansion of Charities Participating in the Campaign	23
Increase in Ownership and Branding of the Campaign	24
Disaster Relief Campaigns	25
Strategies for a Successful Campaign	27
Barriers to a Successful Campaign	27
Nine Principles Leading to Campaign Success	29
Building the Case	29
Branding and Taking Ownership	30

Expanding Giving Options	30
Integrating Employee Involvement	31
Building Leadership and Effective Campaign Organization	31
Matching Employee Contributions	31
Marketing the Campaign and Educating Employees	32
Implementing Technology	32
Measuring Employee Satisfaction.	32
Case Studies	33
American Express.	33
ExxonMobil	34
Thomson West	36
City of Austin.	37
City of Orlando	40
McKesson.	41
NASD	42
Future of Workplace Giving	44
Call to Action.	46
Appendices	49
Appendix A – Self Assessment Tool	50
Appendix B – Employee Survey	55
Appendix C – Campaign Plan.	60
Appendix D – Companies with Expanded Campaigns	62
Appendix E – America’s Charities Members.	63
Appendix F – America’s Charities Board of Directors.	67

Changing Direction: Developing Employee-Friendly Workplace Campaigns with Technology and Best Practices

Introduction

The American tradition of conducting employee giving campaigns in the workplace is changing dramatically. With hundreds of public and private sector employers customizing and branding their campaigns, the United Way's dominant role in workplace giving has been greatly diminished.

In recent years, there has been a significant and undeniable trend among employers, private and public alike, to forge their own direction in developing and administering a campaign.

This report summarizes the reasons for the dramatic shift in attitude and provides insight into how employers can build a successful workplace giving campaign that engages employees, fits with business objectives and benefits the community.

In 2000, America's Charities and The Consulting Network (TCN) joined forces to take a comprehensive look at the workplace environment and the state of employee giving in America. The result of this effort was publication of a ground-breaking report titled *Employee Workplace Campaigns at the Crossroads: Recommendations for Revitalization*. Its findings were reviewed in numerous business publications and distributed to some 1,000 employers across the country.

The report documented that workplace campaigns in America are a valued tradition that offers benefits to both employees and companies, while generating more than \$4 billion annually for charities – approximately \$2 billion from corporate donations and \$2 billion from employee payroll deduction campaigns. It also identified several alarming trends including a decrease in the number of employees participating in the traditional United Way campaign and a growing number of employers that don't conduct a giving campaign at all. It was estimated that this decline in employee participation resulted in 5 million fewer donors and a loss of nearly \$500 million for charities annually.

It has been six years since the *Campaigns at the Crossroads* report was released so once again America's Charities and TCN have joined forces to examine the status of workplace giving.



**In recent years, there has
been a significant and
undeniable trend among
employers, private and
public alike, to forge
their own direction
in developing and
administering a campaign.**

This updated report, *Changing Direction*, involved nearly 100 companies, public sector entities, experts in workplace giving and charities. Individual programs have been reviewed to provide an overview of the current workplace giving environment, identify effective strategies for implementing a successful campaign, examine the future of workplace giving and offer recommendations to organizations looking to grow philanthropy by capturing the potential of the annual giving campaign.

We believe employers that implement these recommendations using the tools provided will be more likely to integrate this important element of corporate social responsibility into their strategic business, employee involvement and community relations vision. They also will involve their employees in an activity that workers will find informative, productive and even fun. The services made possible by employees' generosity will result in vital and healthy communities.

At the same time employees are demonstrating their caring spirit, they will have an increased appreciation for their employer's development of a new, employee-friendly workplace campaign.

This report provides both the inspiration and hands-on tools to help every employer develop a successful campaign, using technology and best practices...while achieving each employer's unique vision for employee involvement and giving programs.

Our thanks to Steve Greenhalgh of TCN for his insight and organization of this report and to Rick Gondella of America's Charities for his excellent design. This report would not have been possible without their dedication and expertise.

We hope you find *Changing Direction* informative and helpful in growing the success of your employee involvement and workplace campaign programs.



Don Sodo
CEO and President
America's Charities



John F. Coy
President
The Consulting Network

You may visit www.charities.org to download and print this report.

We would appreciate your comments and feedback. Please email them to: DSodo@Charities.org

America's Charities

www.charities.org • info@charities.org

Since 1980, America's Charities has brought the nation's best-known and most-loved charities to workplace giving campaigns. In that time, groups like Make-A-Wish Foundation of America, Ronald McDonald House Charities, Reading is Fundamental, Diabetes Research Institute, NAACP, National Childhood Cancer Foundation, Feed the Children and over 150 other national and local charities have trusted America's Charities to represent them in workplace giving campaigns nationwide.

America's Charities members are presented as a giving choice to nearly 10 million Americans in the workplace each year through federal government, state and local governments and private sector corporations.

America's Charities also provides fiscal services for employee-giving campaigns, including its PledgeFirst on-line giving system. Employers using America's Charities for fiscal services distribute at least 94 percent of every employee's gift to their designated charity.

Now in its 25th year, America's Charities has distributed nearly \$400 million to its members and thousands of other charities from coast-to-coast from workplace giving campaigns. America's Charities mission is to provide employers and employees with efficient, effective, low-cost charitable giving campaigns; to offer a broad range of charitable choices that reflect the diversity of the American people; and to provide member charities with the resources required to meet their needs.



**Employers using
America's Charities for
fiscal services distribute
at least 94 percent of
every employee's gift to
their designated charity.**



TCN is a recognized leader on the subjects of corporate citizenship and employee involvement.

The Consulting Network

www.theconsultingnetwork.com • tcncoy@msn.com

The Consulting Network (TCN) is a national consulting firm specializing in the areas of corporate citizenship, community and employee involvement and contribution management.

Over the course of the last seventeen years, TCN has worked with companies and private sector organizations to design effective programs that leverage the unique assets and culture of each client. This includes integrating employee involvement into a company-wide strategy through volunteerism, the employee workplace campaign, employee-directed grant programs, matching gift and incentive programs, and communications and recognition.

The firm maintains Corporate Citizenship: Benchmark Center, based upon its work in benchmarking corporate, nonprofit and education programs, to provide measures of financial and program comparison that can be used to evaluate peer and best-in-class programs.

TCN is a recognized leader on the subjects of corporate citizenship and employee involvement. The firm has contributed to a number of publications on the topic of corporate citizenship.

Research Study Participants

Companies

ADC Telecommunications, Inc.
Aetna Inc.
Albert R. Pressler, P. E.
Ameren
American Express
Ashland Inc.
AT&T (SBC Foundation)
AXA Advisors
Bechtel
Blue Cross and Blue Shield of Minnesota
City of Austin
City of Orlando
C. R. Bard, Inc.
Convergys Corporation
Corning Incorporated Foundation
DTE Energy
Eaton Corporation
Evans & Sutherland
ExxonMobil (Fairfax Virginia location)
FPL Group, Inc.
General Electric (GE Foundation)
Gillette
Goathead
Hallmark Cards
Hospira, Inc.
HSBC - North America
ING

Intel
JCPenney
Kessler Institute for Rehabilitation
Kohler Co.
Lovebear
Lucent Technologies Foundation
McKee Nelson LLP
McKesson
Merck & Co., Inc.
Mitsubishi Electric
PG&E Corporation
PRC
ProFile, Inc.
Progress Energy
Rand
SBC Inc. - SBC Foundation
Schering-Plough Corporation
Sears Holdings Corporation
St. Paul Travelers
Thomson West
Union Pacific
Wachovia Corporation
Wal-Mart Stores, Inc.
Washington State – Combined Fund Drive
Wells Fargo

Thought Leaders

Gary Carr
Kintera
Anthony DeCristofaro
Combined Federal Campaign National Capital Area
Stephen Delfin
National Credit Union Foundation
Deb Furry
Consultant
Mindy Handburg
AmeriPrise Financial Advisors
Matt Howe
National Alliance for Choice in Giving
Linda Robinson
Charitable Coalition for Choice
Thomas Ruppanner
Grey Oaks Partners
Don Sodo
America's Charities
Kalman Stein
Earth Share
Tom Tobin
Global Impact

Project Managers

John F. Coy
The Consulting Network
Stephen K. Greenhalgh
The Consulting Network





Report Summary

Changing Direction: Developing Employee-Friendly Workplace Campaigns with Technology and Best Practices

Workplace Giving – A Valued Tradition

Like everything else in our work life over time, the employee-giving campaign in the workplace must evolve so that it maintains its meaning and value to both employers and employees.

The traditional campaign, often referred to as the United Way Campaign, is no longer the exclusive model. Many top public and private sector employers have developed their own unique campaign with the result of seeing employee participation rebound.

For more than five decades employers have conducted fundraising drives and encouraged employees to contribute to charity at their place of employment. While representing a small percentage of the total amount contributed by individuals, workplace giving is significant in its support of charitable causes in America and as a reflection of employer involvement in communities. Payroll deduction giving has a reputation for being one of the highest-yield and lowest-cost methods of fundraising for nonprofit organizations.

Over the years, the success of workplace giving has focused on the capacity to raise significant amounts of money for charity. It is an effective tactic because it reaches a large number of employees at the workplace with a single campaign, often supporting a wide ranging group of charities. The employer's commitment to support the campaign, coupled with the ease and convenience of payroll deduction, has been instrumental in raising nearly \$100 billion for nonprofit organizations over the last 30 years.

In addition to the dollars raised through workplace giving, employers experience other benefits from this tradition.



For more than five decades, employers have conducted fundraising drives and encouraged employees to contribute to charity at their place of employment. While representing a small percentage of the total amount contributed by individuals, workplace giving is significant in its importance to charitable giving in America.

United Way's dominant role in workplace giving has been greatly diminished. More than ever, employers are changing their campaigns and molding them to be supportive of the organization's business and employee objectives, and to make the campaign responsive to employees' charitable interests.

Employer Benefits

- An effective campaign sends a strong message that the organization is interested in engaging employees.
- The campaign helps build a sense of community among the workforce.
- Workplace giving is another demonstration of being a good corporate citizen and helps improve an employer's image in the community and among key stakeholders.
- Employees look favorably on their employer for conducting a charitable giving campaign.
- The program provides opportunities for employee involvement and team building experiences.
- The campaign can be an effective tool to improve employee morale, relations and retention.

Employee Benefits

- Employees like having the feeling of helping others.
- The campaign is an opportunity to provide exposure to charities and the services they offer in the community.
- The campaign provides a one-stop charitable giving opportunity to employees.
- Employees continue to value the ease and convenience of payroll deduction.

Workplace Giving Environment

The annual employee giving program continues to evolve over time primarily to ensure it fits the ongoing changes at the workplace with respect to culture, employee interests and the employer's strategic direction

As a result, United Way's dominant role in workplace giving has been greatly diminished. More than ever, employers are changing their campaigns and molding them to be supportive of the organization's business and employee objectives, and to make the campaign responsive to employees' charitable interests.

Public sector employers in the late 1970s, aware of their obligation to provide equal campaign access to a variety of charities, opened their campaigns to other charitable organizations beyond the United Way. The courts have ruled that governments which allow a charity to solicit employees' contributions must have procedures for allowing other charities to solicit citing specifically that:

- Governments that permit one organization access must provide criteria for others to apply.
- Governments must establish objective criteria for determining which organizations can qualify to participate in the employee giving campaign.

In the private sector, there have been significant changes in workplace giving since *Campaigns at the Crossroads* was issued six years ago. Companies and individuals participating in this project identified six important trends and programmatic changes.

1. Employee participation in the traditional workplace campaign continues to decline.

The 2000 report identified a significant decrease in employee participation. At that time, only 35 percent of employees at companies with campaigns were participating, which was down from 47 percent in the 1990s.

The percentage of employees participating in the traditional workplace giving campaign continues to decline. Information shared at the United Way of America 2005 Community Leaders Conference reported participation rates of less than 20 percent. United Way reports that from 2000 to 2003, more than 3.4 million donors within their traditional donor base (givers of \$1,000 or less annually) stopped participating in the campaign. This represents about 18.7 percent of the total donor base who no longer support the United Way campaign at work.

Part of the decline can be attributed to the fact that younger employees aren't as likely to participate in the traditional workplace giving campaign.

- 2. Employees have more opportunities to give to charity than ever before.** Payroll deduction is still considered by many to be a major benefit of workplace giving but donors can now use credit cards, electronic checks or go online and make a contribution directly to causes they prefer. Research shows Internet giving to be one of the fastest growing methods of contributing to charity.
- 3. United Way's decline in workplace fundraising campaigns continues.** United Way is transforming to adapt to the changing workplace giving environment by diversifying its fundraising base. According to an April 2006 *Wall Street Journal* article United Way raised \$3.86 billion last year but less than 45 percent or only \$1.7 billion came from workplace giving. Emphasis instead is being placed on leadership gifts, endowments and foundation gifts.

The courts have ruled
that governments
which allow a charity
to solicit employees'
contributions must have
procedures for allowing
other charities to solicit.

The impact of technology and the growth in electronic campaigns is significant, accompanied by a growing role of third-party vendors providing online systems. It is estimated that more than 60 percent of the *Fortune* 500 companies now provide an electronic campaign option.

The same *Wall Street Journal* article reported that "United Way's grip on job-site giving has slipped. Money raised by United Way in the workplace totaled \$1.7 billion during its 2004-05 fundraising season, roughly flat with the year-earlier period and down from a peak of \$1.96 billion in the 2001-02 season." Amazingly, less than one-half of the total dollars reported by United Way now comes from workplace campaigns.

It should be noted that United Way's cumulative fundraising totals include contributions that leave the United Way "system" and are distributed to charities other than its members.

4. **The impact of technology and the growth in electronic campaigns is significant, accompanied by a growing role of third-party vendors providing online systems.** It is estimated that more than 60 percent of the *Fortune* 500 companies now provide an electronic campaign option.

There are a number of reasons why companies are considering an electronic campaign program. These include:

1. Ability to reduce administrative time.
2. Desire to reduce cost of the campaign.
3. Coordination and simplification of communication.
4. Opportunity to customize branding by location.
5. Ease of expanding charitable giving options and enriching content about listed charities.
6. Greater reporting (in real-time) and tracking options/capabilities, thus greater ability to focus on results.
7. Opportunity to better match corporate culture.
8. Capacity to integrate multiple employee involvement activities into a single branded corporate program.
9. The option to provide each employee with personal giving and volunteering accounts.

A note of caution: While technology has allowed companies to expand their employee giving choices through gains in efficiency, it also may result in a loss of the "personal touch" aspects of many campaigns.

5. **In response to the diminished popularity of the traditional campaign, there is an increase in the number of employers taking ownership of, branding and integrating the campaign**

with other employee involvement programs, resulting in an expansion of the number of charities participating in these campaigns.

The number of companies that have expanded their campaign to include additional charities continues to grow. In 2002, TCN released the *Valuing Employee Involvement Survey* and found that 60 percent of companies had expanded their campaign in this manner. While United Way continues to be the primary recipient of funds received from workplace giving campaigns, less than 34 percent of the companies that participated in the research for this report said they conduct a United Way-only campaign. United Way reported at its 2005 Community Leaders Conference that the number of workplaces that offer United Way-only campaigns is down to 20 percent. A fourth study confirms this erosion. The Association of Corporate Contributions Professionals (ACCP) recently released the results from a survey conducted among its member companies that found just 46 percent restrict giving to United Way.

The expansion in charitable choices is being driven by the following four factors.

- The desire of employees for more choice.
- The incorporation of technology, simplifying the process of adding charities.
- As a response to declining employee participation.
- The ability of additional nonprofit partners to fulfill corporate philanthropic objectives.

6. Growth continues in special campaigns to raise money for disasters that are occurring around the world. Employers have conducted disaster campaigns in three of the last five years to accommodate September 11, the Asian Tsunami, and Hurricanes Katrina, Wilma and Rita.

In light of these recent events more employers are creating disaster relief policies to allow them to respond quickly by having established procedures in place, generally launching relief campaigns for a short time frame and allowing employees to contribute by check or credit card. A growing number of organizations are offering a payroll deduction option. Companies often offer to match employee contributions with corporate dollars thus maximizing the success of these campaigns. Typically, employers limit the number of charities eligible to receive funds from these campaigns to a small number of charitable organizations that provide disaster relief services.

United Way reported at its 2005 Community Leaders Conference that the number of workplaces that offer United Way-only campaigns is down to 20 percent.

It is estimated that
some 55 percent of
Fortune companies now
include charity choices
beyond the United Way
in the campaign.

Strategies for a Successful Campaign

Building the case. The case can and should be made to management that the employee giving program is an important part of the workplace culture. It should be given sufficient attention and resources to reach its potential, sending a message that the organization cares about employee interests. It positions the employer as a "Best Place to Work" and enhances its image in the community while giving employees easy access to a low-cost form of giving through payroll contribution.

Branding and taking ownership. Many employers have effectively branded the campaign as their own rather than naming it for a nonprofit partner. Examples include American Airlines' "American Giving," Progress Energy's "Imagine the Progress," Marriott's "Spirit to Serve" and HSBC's "United for Hope." Employees are more inclined to feel campaign ownership if branding is involved in the campaign's identity.

Expanding giving options. It is estimated that some 55 percent of *Fortune* companies now include charity choices beyond the United Way in the campaign. Expansion of campaigns to include more giving options is being driven by four factors: the incorporation of technology, employees desiring greater choice, nonprofit partners helping achieve philanthropic objectives and employers responding to declining employee participation rates. Of course, there can be too much choice, so it makes sense to be strategic in choosing the new options. Organizations that have a wide-open campaign allowing employees to select from any 501(c)(3) nonprofit have found the campaign is too confusing and often overwhelms employees. A best practice is to include specific federations and/or charities that focus on areas that are of most importance to the employer and to the charitable interests of its employees.

Integrating employee involvement. Instead of having all employee involvement programs operate independently under separate brand identities, progressive employers are streamlining existing programs such as events, matching gifts, volunteer activities, workplace giving and disaster relief under one recognizable brand identity.

Building leadership and effective campaign organization. Employers agree that having someone in senior leadership act as a champion for the campaign is a key ingredient of success. Senior officers should be invited to show support through visible participation in campaign events, encouraging employees to participate and making their own personal leadership gift. In addition to the support of senior leadership,

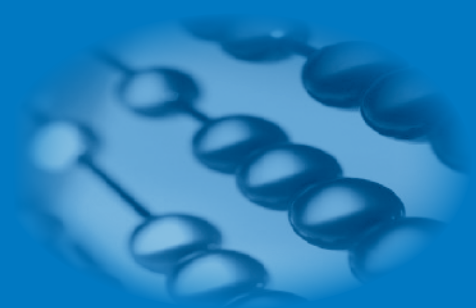
many organizations are forming an employee steering committee to oversee the design and implementation of the campaign. The involvement of these employees shows ownership and encourages the involvement of other employees.

Matching employee contributions. One very visible way to demonstrate employer support for the employee giving campaign is to provide a financial match of employees' contributions. It is estimated that nearly 40 percent of companies that conduct an employee giving campaign offer some form of an employer match.

Marketing the campaign and educating employees. It is important to give employees adequate information before they make their giving decision, and technology can play a role in communicating these details. Using a variety of media to communicate such as emails, posters, letters from the Chief Executive Officer, articles in employee newsletters, and other vehicles can help to reach all employees. Packaging the campaign in an engaging, appealing and fun fashion will aid in capturing the attention of employees.

Implementing technology. More than 60 percent of major employers currently use technology to support their campaign either through their own in-house system or a third-party vendor. Technology helps distribute campaign information, capture pledge information, report on giving, track gifts and recruit volunteers. While there are many benefits to implementing technology, to ensure a successful campaign "personal touch" must be maintained throughout the campaign when communicating with employees.

Measuring employee satisfaction. At the conclusion of any employee involvement program, employees should be allowed to provide feedback about their satisfaction with the program. An employee survey is an effective tool to assess employee attitudes and perceptions and to identify effective campaign practices. Some employers have found focus groups with employees to be an effective feedback mechanism. This information can better arm the planners with the interests and needs of employees in shaping programs.



...nearly 40 percent of
companies that conduct
an employee giving
campaign offer some form
of an employer match.



Future of Workplace Giving

Leading experts agree that the workplace campaign model of the future will be built upon three pillars.

- Offering greater choices in giving, consistent with employees' diversity and varied giving interests.
- Utilizing technology to facilitate ease of giving, the efficient operation of campaigns so more of employees' donations go to the charities of their choice, and expanded information content about participating charities.
- Developing a campaign that will engage employees and build value as one of the most effective ways to support the community through volunteerism and financial support.

Here is what company representatives, charities and consultants predict will be a part of the workplace giving campaign of the future.

Allowing giving year-round. The campaign will be open and available to employees on a year-round basis but will include an enrollment/marketing period for several weeks once a year.

Offering multiple ways for employees to give. The workplace campaign will be closely tied with employee volunteerism and matching gift programs. Employers will offer employees multiple opportunities to participate in charitable activities either through the giving of time or making a financial contribution. Companies increasingly will match employee payroll deduction gifts made through the campaign.

Establishing individual giving accounts. Employees will be able to separate the decision on how much to give to charity and where to give. Employees will be able to establish personal giving accounts/donor-advised funds as a holding place for their payroll deduction gifts until they are ready to make the decision on who will be the recipient charities of their gifts.

Requiring higher standards of accountability. The ability for donors to research and obtain information about charities will push the standard of accountability by charities to a higher degree of efficiency.

Changing Direction: Call to Action

As advocates for more effective employee workplace campaigns, America's Charities, TCN and the participating companies in this research project call upon employers across America to review this report and thoughtfully consider implementing the recommendations it contains. Three steps are offered to help begin the process.

1. Conduct a thorough assessment of the employee workplace campaign and identify employee attitudes and perceptions about your current program.
2. Ensure your organization's culture is supportive of the workplace campaign and all employee involvement activities.
3. Develop specific strategies and tactics to support a program that is focused on employees' charity interests, resulting in a campaign that is more popular, effective and financially successful.



Changing Direction: Developing Employee-Friendly Workplace Campaigns with Technology and Best Practices

Workplace Giving – A Valued Tradition

Although the annual employee giving program is a long-standing tradition in America, it continues to evolve over time primarily to ensure it fits the ongoing changes at the workplace with respect to culture, employee interests and the employer's strategic direction. This report was initiated as a result of the significant changes that have taken place in the annual employee workplace campaign and the growing need to provide research, best practices, examples and tools to support these changes.

The primary goal is to build a strong case with both employers and employees for the value of workplace giving and its importance in the fabric of philanthropy in the United States. This goal is supported by five key objectives that provide the framework for this document.

1. Provide an overview of the current workplace giving environment by identifying recent trends and documenting the most significant changes in workplace giving.
2. Promote effective strategies and provide the tools for implementing a successful campaign.
3. Offer specific case studies of employers that have successfully executed effective workplace giving programs.
4. Examine the future of workplace giving and offer recommendations to employers looking to capture the potential of the annual giving program.
5. Issue a call to action by identifying specific activities employers can take to grow philanthropy through workplace giving.

Workplace Giving – More Than Money Important as a Fundraising Tool for Charity

Giving to charity is an American tradition. *Giving USA*, a publication of Giving USA Foundation, researched and written by the Center on Philanthropy at Indiana University, reports that giving by individu-



**The primary goal is to
build a strong case with
both employers and
employees for the value
of workplace giving and
its importance in the
fabric of philanthropy in
the United States.**

**Increasingly, companies,
both large and small,
are recognizing the
potential employee
giving and employee
volunteer programs have
to enhance community
relations objectives.**

als remains the single largest source of charitable contributions accounting for nearly \$199 billion of the \$260 billion given in 2005.

For more than five decades employers have conducted fundraising drives and encouraged employees to contribute to charity at their place of employment. While representing a small percentage of the total amount contributed by individuals, workplace giving is significant in its support of charitable causes in America and as a reflection of employer involvement in communities. Payroll deduction giving has a reputation for being one of the highest-yield and lowest-cost methods of fundraising for nonprofit organizations.

Over the years, the success of workplace giving has focused on the capacity to raise significant amounts of money for charity. It is an effective fundraising tactic because it reaches a large number of employees at the workplace with a single campaign, often supporting a wide ranging group of charities. The employer's commitment to support the campaign, coupled with the ease and convenience of payroll deduction, has been instrumental in raising nearly \$100 billion for nonprofit organizations over the last 30 years.

The importance of workplace giving is evidenced by the traditional role played by United Way and the emerging role of other federations (e.g. America's Charities, Earth Share, Community Health Charities and Global Impact) in both private and public sector campaigns. More and more charities are seeking membership in a federation with other like charities in order to be listed as a giving choice for employees in branded campaigns, which is a departure from the traditional campaign

Important Component of a Corporate Citizenship Strategy

In addition to the dollars raised through workplace giving, companies experience other benefits from this tradition. Increasingly, companies, both large and small, are recognizing the potential employee giving and employee volunteer programs have to enhance community relations objectives. Corporations see their employees as important and natural extensions of the company's contributions and community relations activities. The *Valuing Employee Involvement Survey* conducted by TCN in 2002 found that employee involvement activities were a high priority for companies. Nearly 78 percent of the 100 companies participating said employee involvement was a high priority or a growing interest/concern for their company. This commitment is demonstrated by growth in the number of employee volunteer programs and the expansion of charities eligible to participate in the matching gift and employee giving programs.

Research further documents that corporate citizenship supported by employee involvement can have a positive impact on doing business in a community, such as attracting investors and hiring and retaining employees. A 2004 Corporate Citizenship Study commissioned by Cone, a Boston-based strategic marketing firm, found that eight in 10 Americans said that corporate support of causes wins their trust in that company.

The study also found that 81 percent of the respondents said that "a company's commitment to a social issue is important when I decide where to work" and 70 percent said the "commitment to a social issue is important in deciding which stocks or mutual funds to invest in." Eighty-five (85) percent said the "company's commitment is important in determining which businesses I want to see doing businesses in my local community." An overwhelming majority of Americans, 86 percent, want companies to talk about their corporate citizenship efforts.

It's clear from the research that the public wants companies to be involved in the community, and an effective employee giving program is key to fulfilling this commitment.

A company's commitment to a social issue is important when I decide...	2004
Which companies I want to see <u>doing business</u> in my local community	85%
Where to <u>work</u>	81%
Which products and services to <u>recommend</u> to other people	74%
Which stocks or mutual funds to <u>invest</u> in	70%

Source: 2004 Cone Corporate Citizenship Study

**It's clear from the research
that the public wants
companies to be involved
in the community, and an
effective employee giving
program is key to fulfilling
this commitment.**



Employee involvement programs, including the workplace giving campaign, can be significant in building morale, fostering a spirit of teamwork among management and employees and strengthening relationships with key stakeholders.

Important Component of an Employee Relations Strategy

In recent years, many employers have expanded their workplace activities including volunteer and matching gift programs and the workplace giving campaign in order to attract more participation and involvement. Senior managers now recognize that involving employees as volunteers and financial contributors is one of the most significant resources the organization can offer to support critical community needs.

Employee involvement programs, including the workplace giving campaign, can be significant in building morale, fostering a spirit of teamwork among management and employees and strengthening relationships with key stakeholders.

Benefits of an Effective Workplace Giving Campaign

The participants that were interviewed for this project helped articulate the specific benefits of an effective campaign to both employers and employees in addition to the money raised through these campaigns.

Employer Benefits

- An effective campaign sends a strong message that the employer is interested in engaging employees.
- The campaign helps build a sense of community among the workforce.
- Workplace giving is another demonstration of being a good corporate citizen and helps improve an employer's image in the community and among key stakeholders.
- Employees look favorably on their employer for conducting a charitable giving campaign.
- The program provides opportunities for employee involvement and team building experiences.
- The campaign can be an effective tool to improve employee morale, relations and retention.

Employee Benefits

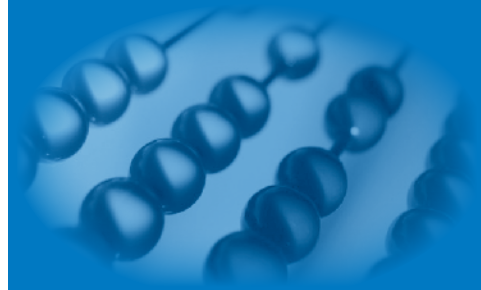
- Employees like having the feeling of helping others.
- The campaign is an opportunity to provide exposure to charities and the services they offer in the community.

- The campaign provides a one-stop charitable giving opportunity to employees.
- Employees continue to value the ease and convenience of payroll deduction.

With the decline in employee participation and the advent of other fundraising methods, it is tempting to dismiss the workplace campaign as being insignificant. The findings of our research suggest that this is not the appropriate analysis. Instead, employers responding to the survey associated with this report stated that while meeting a fundraising goal is important there are other factors that are even more important to them in determining the success of the campaign. These factors, in order of importance, include:

- Breadth of charity choice available through the campaign.
- Employee satisfaction and positive perception of the campaign.
- Promotion of loyalty and goodwill between the employer and its employees.
- Employees' understanding of how their contributions help others in need and their knowledge of important services that are available in the community.

An effective campaign is a positive tool to involve and educate employees about community needs and build teamwork. It also sends a message about the employer's commitment, particularly as an integral part of the employer's broader employee volunteer and community involvement strategy.



An effective campaign is a positive tool to involve employees, educate employees about community needs and build teamwork. It also sends a message about the employer's commitment, particularly as an integral part of the employer's broader employee volunteer and community involvement strategy.

In response to the diminished popularity of the traditional campaign, there is an increase in the number of employers taking ownership of, branding and integrating the campaign with other employee involvement programs, resulting in an expansion of the number of charities participating in these campaigns.

Workplace Giving Environment

The annual employee giving program continues to evolve over time primarily to ensure it fits the ongoing changes at the workplace. Employers want the campaign to be supportive of the organization's culture and its business and employee objectives, as well as responsive to employees' charitable interests. Public sector campaigns were among the first to expand the employee campaign to include other charities. In the late 1970s, courts held that public sector employers who have a workplace campaign must provide criteria through which a variety of charities can apply to their campaign. Specifically, governments must establish objective criteria for determining which nonprofit organizations can qualify to participate in the employee giving campaign.

There have been significant changes in workplace giving since *Campaigns at the Crossroads* was published six years ago. Companies and individuals participating in this project identified six important trends and programmatic changes.

1. Employee participation in the traditional workplace campaign continues to decline.
2. Employees have more opportunities to give to charity than ever before.
3. United Way's significant decline in workplace fundraising campaigns continues while other federations of charities emerge in value to employers and employees.
4. The impact of technology and the growth in electronic campaigns is significant, accompanied by the expanding role of third-party vendors providing online systems.
5. In response to the diminished popularity of the traditional campaign, there is an increase in the number of employers taking ownership of, branding and integrating the campaign with other employee involvement programs, resulting in an expansion of the number of charities participating in these campaigns.
6. The number of special campaigns to raise money for disasters that occur around the world are increasing.

Employee Participation

The 2000 *Campaigns at the Crossroads* report identified a significant decrease in employee participation. At that time, only 35 percent of employees at companies with campaigns were participating, which was down from 47 percent reported in the 1990s. This decrease in employee participation had a significant impact on the amount of money being contributed to charity. Nonprofit organizations that depended heavily on the popularity of the traditional United Way campaign for funding were forced to curtail services, expand independent fundraising strategies at a higher cost and, in some few cases, even cease to do business.

Years later, employee participation in the traditional workplace giving campaign continues to decline. Information shared at the United Way of America 2005 Community Leaders Conference reported participation rates of less than 20 percent. United Way reports that from 2000 to 2003, more than 3.4 million donors who gave \$1,000 or less annually stopped participating in the campaign. This additional loss represents about 18.7 percent of the total donor base.

The employers participating in the online survey and the interviews for this project report higher participation rates (43%) than United Way's 20 percent. The difference is that these employers have moved away from the traditional United Way effort to create a branded campaign of their own, with more varied and diverse charity choices. Some of these employers reported participation rates of 50 percent or more in the recent past.

It is true, also, that some organizations with branded and increased choice campaigns see some decline in participation, which may be attributed to employers who have moved away from pressuring employees to participate.

The workplace continues to change. Research data sustains the finding from the 2000 report that employment growth is still coming from smaller entrepreneurial firms where workplace campaigns are not being conducted. When large employers had campaigns producing at record levels, there was no need to conduct campaigns at smaller companies so this area of growth has been ignored. Many companies include retirees in the campaign and provide them with an opportunity to continue supporting charitable organizations. The 2006 ACCP study found that 40 percent of the companies responding to their survey reach out to retirees for contributions.

The employers participating in the online survey and the interviews for this project report higher participation rates (43%) than in campaigns limiting choice to United Way.

**Research shows
Internet giving to be
one of the fastest
growing methods of
contributing to charity,
as evidenced by the
13 million people
who gave money over
the Internet to help
victims of Hurricanes
Katrina and Rita.**

Another reason for the decline in participation can be attributed to the fact that younger employees aren't as likely to participate in the traditional workplace giving campaign. The 2000 *Campaigns at the Crossroads* report indicated that campaign administrators reported younger donors were less likely to participate. This is consistent with information presented in a 2003 study by Richard Steinberg and Mark Wilhelm, two scholars at Indiana University's Center on Philanthropy, on Generation X-headed households. This generation of people has been found to donate significantly less than those in the baby-boomer and pre-World War II generations. The study was based on data provided by 7,406 households nationally about their giving and found that only 53 percent of Generation X-headed households made annual donations of \$25 or more. This giving rate is well below the percentage of baby boomer (75 percent) and prewar-headed (80 percent) households in the survey.

Nonprofit organizations that have studied the reasons behind the differences in giving among the generations say that members of Generation X are not intrinsically less interested in giving than their parents and grandparents. A majority of these younger people simply have different ideas on how to give.

United Way of America, in a 2001 report, said members of Generation X are demanding more information about groups before they make a gift and tend to distrust large organizations. Research shows that this generation also is more likely to seek out volunteer opportunities rather than make a financial contribution. Hence, there has been significant growth in the number of employers offering formal employee volunteer opportunities. There is much more emphasis on how to use the skills of employees to help and not just write a check. As one person who responded to the survey connected with this report stated it, "The younger workforce is more interested in making their individual giving choices rather than doing what their company wants them to do."

More Opportunities to Give to Charity

Payroll deduction still is considered by many to be a major benefit of workplace giving but today donors can now use credit cards, electronic checks or go online to make a contribution directly to causes they support. Research shows Internet giving to be one of the fastest growing methods of contributing to charity, as evidenced by the 13 million people who gave money over the Internet to help victims of Hurricanes Katrina and Rita. According to a survey by the Pew Internet & American Life Project, more than 26 million people

indicated they had at one time made an online donation. It is estimated that the number of online donors has increased 53 percent since 2005.

In addition to serving as a conduit for donations, the Internet is an important source of news, information and dialogue about disasters and charities. Fifty percent of Internet users looked online for news about hurricanes. Nearly three-fourths (73 percent) of those who sought online news about hurricanes turned to the websites of major news organizations, while 32 percent turned to the sites of nonprofit groups such as the American Red Cross or United Way of America.

United Way's Decline in Workplace Giving Campaigns

United Way is transforming to adapt to the changing workplace giving environment by diversifying its fundraising base. According to an April 2006 *Wall Street Journal* article United Way raised \$3.86 billion last year but less than 45 percent or only \$1.7 billion came from workplace giving. Emphasis instead is being placed on leadership gifts, endowments and foundation gifts.

The same *Wall Street Journal* article reported that "United Way's grip on job-site giving has slipped. Money raised by United Way in the workplace totaled \$1.7 billion during its 2004-05 fundraising season, roughly flat with the year-earlier period and down from a peak of \$1.96 billion in the 2001-02 season." Less than 50 percent of the total dollars reported by United Way now comes from workplace giving campaigns.

Since 2002, United Way has placed more emphasis on funding projects than on funding member charities, seeking to be a community problem solver, rather than a fundraising organization. In fact, many local United Ways have eliminated the concept of member charities.

Instead, not unlike a community foundation, local United Way organizations are focusing on five or six key social need areas within a community. Rather than give money to a wide range of groups, these United Ways are more often discouraging employee designations and promoting giving to the United Way, which then makes allocations or grants to fund organizations delivering services in targeted areas such as youth development or affordable housing.

How this change by United Way relates to the workplace campaign philosophy and objectives of employers and the giving interests of employees is yet to be determined.

Local United Way organizations are focusing on five or six key social need areas within a community. Rather than give money to a wide range of groups, these United Ways are more often discouraging employee designations and promoting giving to the United Way.

A 2002 study by TCN found that 31 percent of companies with a campaign offered an online component. Today, it is estimated that more than 60 percent of the *Fortune* 500 companies now provide an electronic campaign option.

Impact of Technology and Growth in Electronic Campaigns

The 2000 *Campaigns at the Crossroads* report found that more frequently the workplace giving campaign had become a routine administrative matter rather than a valued element of an employer's employee involvement or giving program. Employers also were more concerned about the time and cost associated with conducting a campaign.

In 2000, less than four percent of companies conducting a workplace campaign reported offering an electronic option. A 2002 study by TCN found that 31 percent of companies with a campaign offered an on-line component. Today, it is estimated that more than 60 percent of the *Fortune* 500 companies now provide an electronic campaign option.

There are a number of reasons why employers are considering an electronic campaign program, including:

1. Ability to reduce administrative time.
2. Desire to reduce cost of the campaign.
3. Ease of communication.
4. Opportunity to customize branding by location.
5. Ease of expanding charitable giving options and enriched content about listed charities.
6. Greater reporting (in real-time), tracking options/capabilities, thus greater ability to focus on results.
7. Opportunity to better match organizational culture.
8. Ability to integrate multiple employee involvement activities into a single branded program.

Employers have found electronic campaigns achieve these goals by reducing paper form processing costs and decreasing the expenditure of human capital. Electronic campaigns make it easier to communicate with employees and can be customized and branded by location.

In many instances, technology has allowed employers to expand the charitable giving options, which has a positive appeal to employees. Electronic campaigns offer greater reporting options and tracking capabilities throughout the campaign period allowing a greater ability to focus on results. Many employers are moving more of their daily operations, such as benefits and payroll, on-line so the electronic campaign is a natural extension aimed at reducing paper and automating routine administrative functions. Other employers have been able to integrate the matching gift program and volunteer program through a single electronic vendor thus creating a synergy between these once separate programs.

There are six primary vendors that specialize in electronic employee giving programs. Table 1 provides a background and history on each of these vendors.

Company	Date	Background/History
AmeriGives Stuart, FL (800) 628-2446 www.amerigives.com	1978	<ul style="list-style-type: none"> Began operations under the name System Builders and later changed to The Matching Gift Center. AmeriGives supports matching gifts, volunteer grants, annual and special disaster campaigns.
CreateHope Bethesda, MD (888) 215-4123. www.createhope.com	1999	<ul style="list-style-type: none"> Full-service Web-based solutions provider. Supports grants administration, TeleGive, volunteer programs, matching gifts, annual and special campaigns. Has entered into a partnership with Sponsor Direct, the leading developer of Web-based software applications for corporate sponsors and their agencies.
JK Group Princeton, NJ (609) 799-7830 www.easymatch.com	1989	<ul style="list-style-type: none"> Full-service processing vendor that began as a matching gift center and expanded into volunteer programs and workplace giving campaigns. Largest of the campaign vendors profiled in terms of the number of clients and the dollars distributed to charitable organizations.
Kintera San Diego, CA (866) KINTERA www.kintera.com	2001	<ul style="list-style-type: none"> Formed as a privately-held company in 2000 whose primary customer base was charitable nonprofit organizations. Went public in 2004. Core focus is helping nonprofit organizations identify, track and communicate with potential donors and focus on special event fundraising. Through acquisitions, Kintera has gained access to the workplace giving marketplace. Products support matching gifts, volunteer programs, annual and special campaigns.
Pledge First Chantilly, VA (800) 458-9505 www.charities.org	2001	<ul style="list-style-type: none"> Developed as a product of America's Charities and focuses primarily on payroll deduction and special campaigns. Provides module to manage volunteer events, track volunteer hours, match payroll gifts and links to charity websites. As a nonprofit organization, contributions are received by America's Charities as the fiscal agent and are held in separate bank accounts until distributed to the designated charities. Regional staff also provide campaign consultation and assistance.
United eWay Alexandria, VA (800) 598-8566 http://national.unitedway.org/eway	2001	<ul style="list-style-type: none"> Founded by Valley of the Sun United Way but includes 65 United Ways across the nation. Purchased and supported by United Way of America. Supports online pledging, processing and distribution, volunteer event management, matching gifts, and customer relationships.

Table 1: Technology Vendors

Electronic giving programs that include campaign best practices can have a positive impact on employee participation and total giving. United Way of America in a June 2005 newsletter reports larger than average employee gifts when using an online system to capture pledge information.

Electronic giving programs that include campaign best practices can have a positive impact on employee participation and total giving. United Way of America in a June 2005 newsletter reports larger than average employee gifts when using an online system to capture pledge information.

Employers with electronic campaigns cite several benefits including:

- The ease of online giving.
- The ability to run real time reports.
- An increase in giving.
- A greater sense of confidentiality.
- The capacity to educate donors and provide information about the recipient charities.
- Opportunity to provide each employee with a personalized giving and volunteer account.

Some cautions are raised about electronic giving programs. While technology has allowed employers to expand their employee giving choices through gains in efficiency, it also has resulted in a loss of "personal touch" or personal contact aspects of many campaigns. Expressing a perspective, a nonprofit leader stressed that, "technology has helped make workplace giving more efficient but also less compelling to potential donors. Technology vendors are good at software, mediocre at distribution and reporting, and completely disinterested in creating motivational campaigns."

Thomson West experienced a decrease in participation when it implemented an online giving program. Participation plummeted from 61 to 39 percent the first year of the electronic campaign. The company revised its campaign strategy in 2004, and giving increased by 10 percent with more than 89 percent of the employees responding to the invitation to participate and 62 percent of them making a contribution. The 2004 campaign included many creative events designed to get employees involved. A Thomson West spokesperson says the two primary reasons participation increased in 2004 were: 1) the creation of a campaign cabinet of senior management, and 2) significant volunteer involvement as Care Captains who helped encourage employees to visit the website and make a financial contribution. See the case study on Thomson West for more details about its campaign.

Expansion of the Number of Charities Participating in the Campaign

Traditionally, the annual employee giving program has been a United Way campaign even though research shows that more than 70 percent of employees in companies with a payroll deduction program would like more charitable organizations to participate. The 2000 *Campaigns at the Crossroads* report used statistics from a *Valuing Employee Involvement Survey* conducted by TCN in 1998 to show that 30 percent of the 97 companies participating in the study included federations and charitable organizations other than United Way in their campaigns.

The number of companies that have expanded the campaign to include additional charities continues to grow. In 2002, TCN updated the 1998 *Valuing Employee Involvement Survey* and found that 60 percent of companies had expanded their campaign. While United Way continues to be the primary recipient of funds received from workplace giving campaigns, less than 34 percent of the companies that participated in the research for this report said they conduct a United Way-only campaign. United Way reported at its 2005 Community Leaders Conference that the number of workplaces that offer United Way only campaigns is down to 20 percent. The Association of Corporate Contributions Professionals (ACCP) recently released the results from a survey they conducted among its members that found 46 percent restrict giving to United Way.

The expansion in charitable choices is being driven by four key factors:

- The desire of employees for more choice.
- The incorporation of technology simplifies the process of adding charities.
- As a response to declining employee participation.
- The ability of nonprofit partners to fulfill employer's philanthropic objectives.

A 2004 sampling of companies with expanded giving campaigns, conducted by TCN, found that total giving went up in all of the companies with the initial introduction of additional charities. However, some companies later reported downturns in giving but attributed these decreases primarily to business conditions. Sustained employee participation occurred in 65 percent of the companies with expanded giving campaigns. See Appendix D for a partial list of companies that have expanded the campaign to include additional charities/federations.

Research shows that
more than 70 percent of
employees in companies
with a payroll deduction
program would like more
charitable organizations
to participate.

Employers are assuming ownership of the campaign and branding it with a name and theme to fit the unique culture of the corporation. Companies cite integration, efficiency and standardization as the primary factors behind this centralization.

In addition to the United Way, the federations chosen most often to participate in employee giving campaigns are America's Charities, Community Health Charities, Earth Share and Global Impact.

Increase in Ownership and Branding of the Campaign

In the past, employers often delegated ownership of the campaign to United Way and the program was run in a decentralized manner leaving local managers the decision whether or not to offer a campaign. This approach increased the need for local United Ways to take a key role in organizing the campaign.

Recent benchmark studies confirm this is changing. More than 50 percent of companies that conduct workplace giving programs indicate they are centralizing the campaign and taking a stronger leadership role at corporate headquarters. Employers are assuming ownership of the campaign and branding it with a name and theme to fit the unique culture of the corporation. Companies cite integration, efficiency and standardization as the primary factors behind this centralization.

The following table gives examples of corporate branded campaigns.

Company	Brand	Components of the Brand
American Airlines	American Giving Campaign	Year round employee campaign that includes five federations, an employee relief fund and select corporate/employee initiatives.
Dell	Dell Direct Giving Campaign	Employee giving campaign with three federations and United Way.
HSBC	United for Hope	Employee giving campaign that includes United Way and six specific charities.
Progress Energy	Imagine the Progress	Employee volunteer program and workplace giving.
Prudential	Prudential Cares	Employee volunteer and matching gift program, and workplace campaign.
Siemens	Siemens Caring Hands	Employee giving campaign featuring federations and volunteer programs.
Thomson West	Because You Care	Employee giving campaign featuring federations and volunteer programs.
Walgreen's	Walgreen's Charity Choice	Employee giving campaign with four nonprofit partners.

Table 2: Companies with Branded Giving Programs

Disaster Relief Campaigns

Traditionally, fundraising drives among employees were limited to the once-a-year workplace giving campaign. Beginning in 2001 with the events of September 11, employees expressed the need for additional fundraising to help with disaster relief. Since then, companies have conducted disaster campaigns in three of the last five years to respond to the September 11 terrorism, the California wildfires, the Asian Tsunami, and Hurricanes Katrina, Wilma and Rita. Employees have responded favorably. The American Red Cross had more than 200 companies set up an on-line giving program that raised \$35 million to facilitate employee giving to the Katrina disaster.

Recognizing the advantages of having established procedures in place, employers are creating disaster relief policies and giving platforms to allow them to respond quickly. Most of the charities that provide disaster relief services offer Web-based giving sites. In addition, the third-party technology vendors also market disaster campaigns as part of their suite of services.

Employers generally offer relief campaigns for a short time frame allowing employees to contribute via check or credit card, yet a growing number are offering a payroll deduction option as well. Companies often offer to match employee contributions with corporate dollars thus maximizing the value of these campaigns.

Typically, employers limit the number of charities eligible to receive funds from these campaigns to three or four charitable organizations that provide disaster relief services or work with a broader list of relief and development organizations provided by umbrella organizations such as InterAction. According to CreateHope, the most requested charities on their online GivingStation include the American Red Cross, the Salvation Army, Habitat for Humanity and the Humane Society. America's Charities' disaster relief fundraising for employees included a broader list of agencies, as compiled by InterAction.

One company raised more than \$2 million from employees including the corporate match in one day. A Roper Reports Public Pulse survey found that disaster relief was the most common cause Americans supported in 2005 with 52 percent saying they had supported rebuilding efforts either financially or with volunteer time.

Recognizing the advantages of having established procedures in place, employers are creating disaster relief policies and giving platforms to allow them to respond quickly.

The American Red Cross offers the following best practices for employers that are considering a disaster campaign.

- Be prepared in advance by having established policies and procedures in place.
- Identify the charity partners well in advance, cultivate the relationship and know the appropriate contacts at each charity that will be assigned to your organization.
- Communicate with employees. Good information will reduce the number of questions that will arise during the disaster campaign.
- Most companies have found that a corporate match is an incentive to encourage employee participation.

Strategies for a Successful Campaign

In order to identify the strategies for a successful campaign, one first must determine the barriers to an effective employee giving program. The organizations and individuals contributing to this report identified five key barriers.

Barriers to a Successful Campaign

- Lack of highly-committed leadership and limited resources to run an effective program.
- Too great a reliance on technology and the loss of "personal touch" in the campaign.
- Increased opportunity for employees to give to charities outside the workplace campaign.
- Scandals in the nonprofit world.
- General economic conditions.

To overcome these barriers, employers were asked to identify the actual strategies they had developed in order to increase the effectiveness of their programs. The strategies are summarized in the following table along with the resulting benefits.

Strategy	Benefit
Match employee contributions.	Increase in both giving and participation.
Introduce fundraising events.	Greater reach into the employee base, resulting in participation rate increases.
Greater involvement of senior executives.	Shows employer's commitment to the campaign.
Expand charitable choices.	Increase in employee participation.
Implement an electronic pledge system.	Efficiency, less time spent on reports and tracking results.
Expand campaign coverage to employees in remote locations.	Greater participation and more sense of a single united campaign.
Allow direct donations to non-United Way agencies.	Increase in participation.
Restore "personal touch" and contact by reinstating campaign volunteers throughout the organization.	Opportunities for employee engagement in the campaign. Increase in participation.
Integrate fully with the company's matching gift program.	Became a year-round program vs. an annual campaign. Provided donors with giving options, flexibility and choice.
Incorporate a "roll over" feature.	Employees can elect to keep the same agency, choices and donation amount from the previous year.

In order to identify the strategies for a successful campaign, one first must determine the barriers to an effective employee giving program.

The top factor impacting the decision to participate was knowing someone who has received services from a charity that participates in the campaign. This was followed by having an organizational culture that is supportive of an effective giving program.

Strategy	Benefit
Work jointly with organized labor to solicit support.	Increase in participation among union associates.
Improve communication.	Increase in awareness.
Co-brand all community programs.	Allows team members to understand that the employer has a year round commitment to supporting and engaging in local communities and not just during the campaign.

Table 3: Strategies and Benefits to the Workplace Campaign

In an effort to identify the practices that employers can implement to encourage great employee participation, our survey asked respondents to rate the effect of 15 different items on a donor’s decision to participate in the employee giving campaign. The top factor impacting the decision to participate was knowing someone who has received services from a charity that participates in the campaign. This was followed by having an organizational culture that is supportive of an effective giving program, as illustrated in Table 4.

Items	Rank	Rating (scale of 5)
Receiving or knowing someone who has received services from a charity in the campaign	1	4.44
Organizational culture that is supportive of an effective giving program	2	4.20
Site coordinators recruited for each location	3	3.93
Volunteering with a particular charity	4	3.87
Expanded giving options beyond United Way	5	3.86
Online availability of campaign brochure	6	3.74
Being asked to give one-on-one by a peer	7	3.73
Strong educational component for employees	8	3.68
Volunteering for the campaign	9	3.56
Company-wide leadership giving program	10	3.44
Listening to a charity speaker	11	2.39
Attendance at a special event such as a rally or charity fair	12	3.12
Campaign branded with a name and theme	13	3.02
Seeing a campaign video	14	2.59
Reviewing a campaign brochure	15	2.40

Table 4: Factors Impacting a Decision to Participate in the Campaign

Research conducted by TCN confirms that the basis of a successful approach for workplace giving campaigns is founded upon the following nine principles,

Nine Principles Leading to Campaign Success

1. Build a business case and marketing plan for the program.
2. Brand and take ownership of your campaign.
3. Expand your giving options through strategic choice.
4. Integrate the campaign with other employee involvement programs.
5. Build leadership and an effective organization.
6. Match employee contributions.
7. Market the campaign and educate employees.
8. Implement the strategic use of technology.
9. Measure employee satisfaction.

Building the case. The case can and should be made to management that the employee giving program is an important part of the workplace culture. It should be given sufficient resources to reach its potential, sending a message that the company cares about employee interests. It positions the company as a "Best Place to Work" and enhances the company's image in the community while giving employees easy access to a low-cost form of giving through payroll contribution.

Steps a company can take to build an effective case for a highly visible and productive employee giving campaign:

- Survey employees – learn more about their charity interests and campaign needs.
- Benchmark other best practice programs and campaigns.
- Align the case for a campaign with company vision, values or goal statements.
- State and sell the advantages and benefits to employees, company and community.
- Find an officer or senior manager to help promote the campaign to senior management.
- Establish an employee committee to provide guidance and support to the new campaign and to its highly committed, passionate administrator.

The case can and should be made to management that the employee giving program is an important part of the workplace culture. It should be given sufficient resources to reach its potential, sending a message that the company cares about employee interests.

Expansion of campaigns to include more giving options is being driven by four factors: the incorporation of technology, employees desiring greater choice, nonprofit partners helping achieve philanthropic objectives and employers responding to declining employee participation rates.

Branding and taking ownership. Many employers have effectively branded their campaign as their own rather than naming it for a nonprofit partner. Examples include American Airlines' "American Giving," Progress Energy's "Imagine the Progress," Marriott's "Spirit to Serve" and HSBC's "United for Hope." Employees are more inclined to feel campaign ownership if branding is involved in the campaign's identity.

Benefits of branding your campaign

- Builds off overall branding strategies.
- Establishes a unifying theme that connects employees across the organization.
- Creates ownership with employees.
- Integrates messages and promotion.
- Standardizes program and measures.

Expanding giving options. It is estimated that some 55 percent of *Fortune* companies now include charity choices beyond the United Way.

Expansion of campaigns to include more giving options is being driven by four factors: the incorporation of technology, employees desiring greater choice, nonprofit partners helping achieve philanthropic objectives and employers responding to declining employee participation rates. Of course, there can be too much choice, so it makes sense to be strategic in choosing the new options. Employers that have a wide open campaign allowing employees to select from any registered 501(c)(3) nonprofit have found the campaign is too confusing and often overwhelms employees.

A best practice is to include specific federations and/or charities that focus on areas that are of most importance to the employer and to the charitable interests of its employees.

Many employers have found federations represent an effective way to expand charitable choices and, at the same time, provide a focus for giving as federations often consist of charities with a similar focal point. A key role of federations is to evaluate member charities annually to assure employers and donors that they meet rigorous standards of performance and financial integrity. Various surveys of the top workplace campaigns in the private sector indicate the leading federation participants are America's Charities, Community Health Charities, Earth Share, Global Impact and the United Way. Occasionally, local social action or arts federations may participate.

Integrating employee involvement. Instead of having all employee involvement programs operate independently under separate brand identities, progressive employers are incorporating existing programs such as events, matching gifts, volunteer activities, workplace giving and disaster relief under one recognizable brand identity.

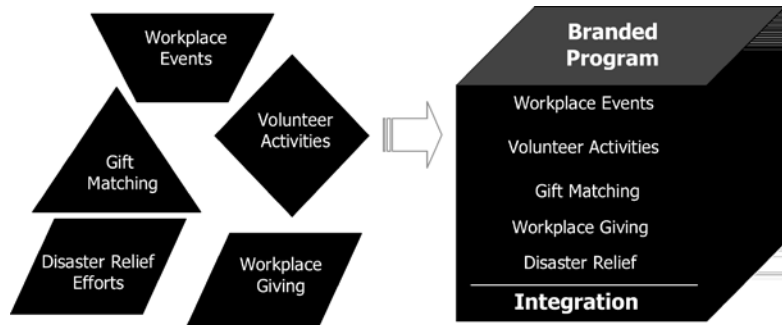


Table 5: Integrated Employee Involvement Strategy

Building leadership and effective campaign organization. Employers agree that having someone in senior leadership act as a champion for the campaign is a key ingredient of success. Senior officers should be invited to show support through visible participation in campaign events, encouraging employees to participate and making their own personal leadership gift. In addition to the support of senior leadership many employers are forming employee steering committees to oversee the design and implementation of the campaign. The involvement of these employees is key to showing ownership and encouraging the involvement of other employees. The employee committee can contain representation from departments such as payroll, human resources, employee communications as well as employees who are well recognized by others as being charitable minded and can serve as a champion and advocate for the campaign.

Matching employee contributions. One very visible way to demonstrate support for the employee-giving campaign is to provide a financial match of employees' contributions. It is estimated that nearly 40 per cent of companies that conduct an employee giving campaign offer some form of a corporate match.

Matching employee contributions has a positive impact on giving. Research demonstrates that when employee contributions are matched all measures of success are positively impacted including employee satisfaction, employee participation and average gifts. A United Way of America study showed that per capita rates were highest among companies that offer match incentives versus those companies without a match-

Matching employee contributions has a positive impact on giving. Research demonstrates that when employee contributions are matched all measures of success are positively impacted including employee satisfaction, employee participation and average gifts.

Employees are more likely to make a financial contribution if provided information or the ability to interact directly with charities. Campaign marketing efforts should share information about the charities and, if possible, opportunities for employees to interact with the charities that participate in the campaign.

ing program. Matching programs show a corporate commitment to the cause and encourage employees to donate since their gift will be leveraged by the corporation.

Marketing the campaign and educating employees. It is important to give employees adequate information before they make their giving decision and technology can play a role in distributing these details. Using a variety of media to communicate such as emails, posters, letters from the Chief Executive Officer, articles in employee newsletters, and other vehicles can help to reach all employees. Packaging the campaign in an engaging, appealing and fun fashion will aid in capturing the attention of employees.

Employees are more likely to make a financial contribution if provided information or the ability to interact directly with charities. Campaign marketing efforts should share information about the charities and, if possible, opportunities for employees to interact with the charities that participate in the campaign. In recent years, companies have encouraged the use of socials, charity fairs and/or events as a way to promote the campaign. Charities can be invited to participate in these socials as one opportunity to interface with employees and respond to questions.

Implementing technology. More than 60 percent of major companies currently use technology to support their campaign either through their own in-house system or a third-party vendor. Technology helps distribute campaign information, capture pledge information, report on giving, track gifts and recruit volunteers. While there are many benefits to implementing technology, to ensure a successful campaign “personal touch” must be maintained throughout the campaign when communicating with employees.

Measuring employee satisfaction. At the conclusion of any employee involvement program, employees should be allowed to provide feedback about their satisfaction with the program. An employee survey is an effective tool to assess employee attitudes, perceptions and to identify effective campaign practices. Some companies have found focus groups with employees to be an effective feedback mechanism.

Conducting focus groups with younger employees may be beneficial in developing campaign strategies that will appeal specifically to this group. Give employees an opportunity to discuss their interests and how the employer can design a program that appeals to them.

Information gathered through employee surveys and focus groups can better arm planners with the interests and needs of employees in shaping programs.

Case Studies

American Express: Effective Campaign Branding

Companies now recognize the value of taking ownership of their programs. American Express provides a good example of a company that has branded the campaign with a name, theme and new vision.

In 2001, American Express changed its employee giving campaign from a strictly United Way-branded program to include three additional charitable federations and four independent charities. The newly expanded campaign included the following charity partners:

- America's Charities
- Community Health Charities
- Earth Share
- United Way
- Junior Achievement
- Hispanic Scholarship Fund
- Reading is Fundamental
- United Negro College Fund (UNCF)

As part of the campaign branding the company adopted a new tag line "Your gift, Your choice" to promote the additional charitable choices. American Express kept that tag line for two years and during this time all the marketing efforts were focused on educating employees on the new charitable choices. Posters, brochures and videos were developed that featured the logos of the new partners and information about each. In 2002, Global Impact was added as an additional charity partner. Since the original campaign partners were selected Junior Achievement and Reading is Fundamental joined the America's Charities federation and now participate under its member listing.

In 2003, American Express wanted to re-brand the campaign and shift the focus from education about the participating charities to encouraging more employees to participate. The tag line was changed to "Give a

little, Do a lot." Marketing materials were altered to demonstrate the impact of employees' charitable contributions and to show that even a small donation would make a difference. American Express worked closely with each charitable partner to collect success stories and examples of "What Your Dollar Will Buy." Employee participation did increase with the new brand.

In 2004, American Express integrated its matching gift program into the workplace campaign and announced a new plan to match all contributions to the workplace giving campaign on a dollar-for-dollar basis. Participation jumped from 48 percent to 53 percent when the match was implemented.

Branding provides an opportunity to illustrate through materials and communications that the campaign belongs to the company and aligns the campaign with other key business messaging strategies. American Express created a series of message statements that tied to its core business. For example, during the 2004 campaign the company developed a series of posters with the tag lines "another good place to invest" or "another place American Express is welcome." These messages tie directly to the company's corporate message strategies.

ExxonMobil: Motivate Employees, Increase Participation and Energize the Campaign

At the Fairfax, Virginia location of ExxonMobil the campaign has achieved record levels of participation and employee involvement. ExxonMobil's 2005 "Your Giving Makes a Difference – Employees' Favorite Charities Campaign" achieved participation rates of 96 percent. Patrick Dexter of ExxonMobil identified the program's successful template: stressing strong incentives; early notification; "personal touch"; and plenty of reminders, follow-up and updates that energized the campaign and motivated employees to participate. The driving goal behind the program was to encourage all employees to thoughtfully consider contributing and to have them make their giving decisions early in the campaign.

Events

Agency fair. Holding an agency fair helped raise employees' awareness of needs in the community and guided them in their giving decisions. One hundred and five agencies attended the fair and campaign coordinators were encouraged to attend, lead by example and promote the fair to their co-workers. Ten gas cards, each valued at \$50, were given away to employees during a drawing throughout the fair.

Ice cream social. Demonstrating leadership commitment and making the campaign fun were the driving purposes behind the social which was held the Friday before the campaign started. Work groups were invited to attend in assigned 30-minute blocks and management supported the campaign by scooping ice cream.

Incentives

Weekly raffle. Weekly raffles were conducted on day two and day five of the campaign to encourage employees to make their giving decision early in the campaign. In order to be eligible for the raffle prizes, pledge cards had to be submitted by 3 p.m. on each of the raffle days. Coordinators used this as a motivational tool to ensure the timely return of pledge cards. The prizes for each raffle included sixteen pairs of sports tickets as well as over 100 prizes of \$50 gift certificates.

Receptions and time off. Incentives were developed to encourage participation on the department level. If 90 percent made a contribution, they received a departmental sponsored reception. If 92.5 percent participated, they were rewarded with a half-day off as well as a department sponsored reception. For a 95 percent participation rate, employees received two half-days off and the reception.

Communication

The campaign was promoted through various communication vehicles to keep employees constantly informed about the campaign and to lend a "personal touch" to the campaign with banners, emails, campaign stories, updates and results.

Posters. Ten posters promoted agency fair information, primary messages and campaign tracking. Key messages consisted of, "Your giving makes a difference to meeting the increasing needs of our community," "100% of your donation goes to the charity of your choice," and "ExxonMobil adds about 40 cents to every dollar donated to a local health and human services charity." To compare how different departments were doing, a race car poster showing the percent of employees giving per department was displayed in front of the cafeteria.

Stickers and video. "I Made a Difference" stickers were distributed to employees who completed their pledge forms to wear or display at their desks. Twenty copies of the campaign video were available starting the week before the campaign and were shown in high-traffic locations for the ten days of the campaign by the elevators and outside the cafeteria.

ExxonMobil not only managed to attain nearly perfect participation but also raised a new company record of \$1,458,039. All departments exceeded 93 percent participation to win the departmental sponsored reception and half-day off. To wrap-up the campaign, an email was sent to all employees shortly after the campaign's conclusion reporting the final record-breaking results and inviting them to celebrate with cake that day in the cafeteria. And finally, leadership givers were sent a letter and small token on October 14 to honor their contributions equaling the equivalent of donating one hour of salary or pay per month. A president's letter was sent the same day reporting the final campaign results. ExxonMobil's campaign demonstrates the potential of keeping the campaign exciting and top-of-mind for employees.

ExxonMobil conducts campaigns at 25 major locations in the United States. This case study focuses on the activities and results of the Fairfax, Virginia facility.

Thomson West: Branding and Marketing to Revive Participation

When the focus of Thomson West's employee giving campaign shifted to online giving in 2003, participation rates dropped from 61 percent to 39 percent. The combined effect of the online giving focus and decreased personal contacts resulted in a "low-touch" environment that caused this 22 percent dip in participation.

By revising the 2004 Because We Care campaign strategy, while retaining online giving, Thomson West was able to revive employee participation and recover lost ground from the 2003 campaign. The 2004 campaign broke company records for participation and gifts, raising more than \$1.3 million. This trend continued in 2005 by again setting record level giving of \$1.46 million and 60 percent employee participation.

Thomson West attributes its campaign turnaround to improved branding and marketing efforts.

Throughout the facility, visual cues reinforced the campaign brand. Posters, banners, window clings at building entrances, bulletin board signs, campaign volunteer T-shirts and campaign thermometers in common areas gave employees a reminder of the campaign's progress in terms of participation and dollars raised.

Executive support was demonstrated through various means: 1) leadership of the campaign; 2) communication and promotion; and 3) financial contributors to the campaign.

A campaign cabinet included executive level leadership and representation from each of the business units. The cabinet was instrumental in formulating campaign strategies and was visible in the com-

munication, promotion and events of the campaign. An email was sent to all employees from the president and Chief Executive Officer introducing the senior vice president of operations as the Campaign Chair. Three "Leadership in Giving" meetings were then held for all executives at the manager level and above prior to the campaign kick-off.

Campaign email messages. All 5,000 employees received an email from the Campaign Chair's personal email box.

The company intranet highlighted the Because We Care Campaign on its homepage and provided easy access to the online giving form and campaign video. The information was refreshed with a weekly progress update, informing employees on campaign momentum and included feature-length stories about employees' engagement to build excitement around the campaign. Manufacturing employees were provided with printed versions of the weekly updates.

Employee focus groups indicated that employees would be more likely to give if they knew a co-worker who would benefit. Three employees shared their personal stories on a short, inspirational campaign video that reinforced the campaign brand and slogan. In addition to being posted on the company intranet, it was displayed in common areas on plasma screens throughout the facility. A "Question on the Street" video asking employees to share why and how they contribute to the campaign also was posted to the intranet.

Care Captains. Recruited to serve as a "street team" for the campaign, 154 captains answered questions and assisted employees with the online giving form. Balloons were used to indicate where Care Captains' offices were located throughout the facility.

Creative activities. Tricycle races, an employee jazz band concert, campaign art contests, ice cream socials, a salsa bar event, jeans days and other activities helped to drive campaign participation.

City of Austin Combined Charities Campaign: A Federated Campaign Model

The purpose of the City of Austin Combined Charities Campaign (COACCC) is to encourage charitable giving by Austin City employees. This public sector campaign is built upon several best-in-class strategies including:

- Employee ownership and involvement.
- Support from senior leadership.

- Expanded giving options.
- Effective promotion and education program including a strong connection between the employees and the participating charities.
- Training of campaign volunteers.

Employee ownership and involvement. The campaign is owned by city employees. Every department is invited to send a representative to the campaign steering committee and more than 95 percent of departments are represented. Employees are involved in virtually every decision from the basic design of campaign materials and payroll contribution forms to the training of the volunteers and campaign events.

According to Toby Hammett Futrell, Austin City manager, "The success of the Combined Charities Campaign is entirely due to the efforts of Austin City employees. Volunteers plan every phase of the campaign, from creating each year's marketing theme to organizing campaign events. The end result of their hard work reflects the City workforce's total commitment to serving and improving Austin, not just professionally but also by donating their hard-earned wages and personal time to our community. And because many of these charities have a statewide or national presence, their local effort creates a much broader impact, helping people around the country."

Support from senior leadership. The city manager is a visible champion of the campaign and her office is represented at steering committee meetings. A city department director chairs the campaign, with the responsibility rotated among directors who volunteer to serve in that capacity. The co-chair of the campaign, who serves as chair the following year, heads the leadership giving efforts. This individual personally calls on all department directors and many senior staff to encourage participation and giving at a leadership level and to endorse the campaign through leading by example.

Expanded giving options. More than 500 charities that are members of 12 federations or city-sponsored agencies are included in the campaign. City-sponsored agencies must work with or benefit the city directly. In 2005, the following federations participated.

- America's Best Charities
- America's Charities
- Another Way Texas Shares

- Black United Fund of Texas
- Children's Charitable Alliance
- Community Health Charities Texas
- Earth Share of Texas
- Global Impact
- Local Independent Charities
- Neighbor to Nation
- United Way Capital Area
- United Way Williamson County

Federation leaders feel unusually connected to the campaign because the City of Austin's guidelines allow them to select the fiscal agent and manager of the campaign every year from among the participating federations.

Effective marketing and promotion of the campaign. The campaign utilizes a campaign brochure, posters, email, city-wide communications and is promoted on the city's intranet site. More than 150 employee meetings were held as part of the 2005 campaign. Most of these meetings included a speaker from one of the participating charities.

Special events are held but these events are designed to encourage payroll contribution gifts. In 2005, 84 percent of the contributions came through payroll pledging, which simplifies giving for employees.

This campaign is not coercive. Although there is friendly competition with and between many city departments, the voluntary nature of the campaign is stressed in steering committee meetings, the coordinator training sessions, the departmental meetings and in the communication materials.

Training of campaign volunteers and agency representatives. Training sessions are held for both the city department representatives as well as the agency speakers who will participate in the COACCC. Department representatives are trained about successful, ethical campaign practices and are prepared to respond to employee questions.

The charity speakers are trained in advance of their speaking assignments at department meetings to ensure they are able to represent all 500 charities in the campaign and not just their own. The speakers are trained to learn what the city employees do in their daily work and are encouraged to honor and recognize city employees for the work they do.

The 2005 COACCC campaign achieved a 21 percent increase over the 2004 campaign by raising \$753,463 with more than 31 percent of city employees participating. The average gift in the COACCC campaign has increased 29 percent since 2002.

City of Orlando: Expanded Giving Campaign

The City of Orlando with nearly 3,000 employees has a long tradition of conducting an employee giving campaign. Prior to 2001, the campaign was limited to United Way and the United Arts of Central Florida. A decision was made to increase the number of federations eligible to participate and the 2001 campaign was expanded to include America's Charities, The Community Foundation of Central Florida and Community Health Charities.

Both giving and participation increased with the expansion of additional charities. Total giving increased nearly 25 percent. Today the campaign includes seven federations/groups including:

- America's Charities
- Community Health Charities
- Community Foundation of Central Florida
- Heart of Florida United Way
- Independent Charities of America
- Neighbor to Nation
- United Arts of Central Florida

In addition to expanded charitable choices the city has made a concentrated effort to incorporate several best-in-class strategies including securing senior management support, communicating to employees about the campaign, allowing employees to interact with the recipient charitable organizations and implementing an electronic giving campaign.

Senior management support. Participation included the mayor, department directors and division managers. Division managers were recruited by department directors to serve as the campaign co-chairs. Leadership endorsed the campaign and then actively participated in the campaign open houses.

Communicating with employees. Through emails, the city intranet site, flyers and posters employees are able to learn about the campaign. A campaign coordinator was selected in each department and this person had the responsibility to communicate with employees, respond to questions and encourage participation.

Campaign open houses. Held at various locations throughout the city to enable city employees to participate, these open houses were scheduled so that all shift workers could attend. Employees were encouraged to attend and visit with the nonprofit organizations that participate in the campaign. Door prizes were donated by the charities and awarded to employees that attended the open house. To be eligible for a door prize, the employee had to visit with a number of the charities and have them mark a card to indicate they visited the booth. Completed cards with the stickers from the nonprofit agencies were entered into a drawing.

Employees could give via the intranet or the Internet. The City made it easy for employees to make a contribution with a system providing detailed information and Web links to participating charities.

Incentives tied to levels of giving. Gifts were offered for employees who give a percentage of their salary to charity.

The City defines a successful campaign as one where employees feel good about the campaign, like the charitable choices, and where campaign goals are met. The City feels that a successful campaign helps the city's image, while providing funds to many city-supported programs.

McKesson: A National Campaign Approach

The McKesson Employee Community Campaign is the company-sponsored program whereby employees can make a contribution to their favorite charity. This annual event has become a tradition, but like other employee programs it has evolved significantly in recent years.

Historically, the campaign was decentralized with each location/operating company taking responsibility for the campaign, which was often administered by the local United Way. The result was confusion, poor communication with employees and a disjointed approach to employee giving. In 2004, the company

decided to centralize the campaign with responsibility residing at corporate headquarters with the community relations team. Two primary objectives were identified for adopting this national approach.

- Assume ownership of the program.
- Create a unified, consistent approach to the campaign across all company locations.

According to Carrie Varoquiers, community relations director, the centralized approach offered the company more control over the campaign and allowed for streamlined employee communications. The chief executive officer acted as a spokesperson for the campaign. He communicated with employees at the beginning of the campaign and provided progress reports throughout. Ms. Varoquiers says the national campaign resulted in a unified approach and has become more efficient to administer and more cost effective, resulting in an increased amount of money going to the charities.

At the same time the company adopted the national campaign approach it implemented an electronic pledge system. Employees can designate contributions to any 501(c)(3) organization. Drawings are held throughout the campaign to provide incentives for employee participation. The company sponsors a leadership giving program for people who give one percent of salary or \$1,000.

The company credits the national approach, the online giving system, the freedom to give to the charity of choice and the visible leadership of senior management as key factors in the success of the campaign. "The opportunity to give online through payroll deduction sends a message that the company wants to make giving as easy as possible for our employees," according to Ms. Varoquiers.

NASD: Engaging Employees in the Campaign

The NASD (National Association of Security Dealers) built its campaign upon three key strategies.

- Employee ownership and engagement.
- Strong management support and involvement.
- Expanded giving options.

Employee ownership and engagement. Approximately 50 employee Campaign Coordinators manage the annual campaign across 18 locations, covering an employee population of about 2,500. In addition, employees are invited to submit articles about their personal involvement with a charity. The stories are

featured on the electronic giving site as well as distributed to employees throughout the company. These powerful stories help personalize the campaign to other NASD employees.

Several events are held as part of the campaign. Charity representatives are invited to attend each of these events and to meet with employees to help them learn more about the critical services they provide in the community. Special employee breakfasts, luncheons, and even ice cream/dessert socials are held at many locations with the main emphasis being on participation through payroll contributions. A raffle is conducted at the national level with many locations holding local raffles as well. Prizes included free roundtrip airfare for two, hotel accommodations, various gift certificates, and more.

The company indicates that the strong involvement and ownership by employees has improved the image of the campaign over the years. To encourage participation, NASD underwrites the administrative costs of the online campaign so that all employee contributions go to charity.

Strong management support and involvement. Managers at all levels of the organization support and are actively involved in the campaign. The chief executive officer kicks off the campaign with a written message to employees. Additionally, senior leadership participate in promotional events throughout the campaign. The chief executive officer sends a progress report to employees about midway through the campaign to report on the progress to date and to encourage even greater participation.

Expanded giving options. The NASD campaign allows employees to give to any 501(c)(3) charitable organization and is supported by a large database of charitable organizations that are listed online and are eligible to receive gifts. Employees may suggest charities to be added to this database. Employees are encouraged to direct their gift to the charity of their choice.

The company chooses a new theme each year and tries to tie the theme into its core mission of investor protection and market integrity. Past themes include Securing a Better Future and Investing in Hope.

Total giving has increased 120 percent since 2002. In 2005, about 52 percent of the employees participated with more than \$382,000 being raised for charities. The 2005 campaign included a disaster relief component to support victims of Hurricane Katrina.

Future of Workplace Giving

The companies and other employers participating in the survey and research for this project are optimistic about the future of workplace giving. No one foresees the demise of giving at the workplace but they do predict changes.

Looking ahead to the future of workplace giving campaigns, John Coy of The Consulting Network (TCN) predicts that employee involvement will continue to grow in importance as it gains support from management. Coy foresees that within the workplace:

- Employees will have a greater voice in shaping their benefits and work/life programs and in selecting programs to support with their time and money.
- Employers will seek to be recognized for their workplace giving campaigns and will further promote recognition within the organization.
- Employees may one day even have giving and volunteer 'accounts' where they can record and track their philanthropic efforts over time.
- Administration of employee involvement programs will be outsourced in more cases as technology is able to meet and exceed sophisticated and complex needs within the organization.

Factors that will heavily influence the design and conduct of campaigns include these key trends:

- Technological advances will continue to impact campaigns, both positively and negatively.
- Employees who grew up in an era of diversity and a culture of choice will continue to express interest in greater choices in charitable giving through workplace campaigns.
- Local United Ways will continue their migration away from the workplace giving campaign as their primary fundraising tool.
- Devolution of the traditional workforce will continue. Commuters, contract and short-term employees complicate the traditional workplace giving model. We will continue to see a new generation of workers with different charitable interests.
- Internet giving will surge in use. Employees will be able to support charity directly by giving online. Giving on the Internet will compete with payroll giving as an avenue for individual donations.

Leading experts agree that the workplace campaign model of the future will be built upon three pillars.

- Offering greater choices in giving, consistent with employees' diversity and diverse giving interests.
- Utilizing technology to facilitate ease of giving and the efficient operation of campaigns so more of employees' donations go to the charities of their choice.
- Developing a campaign that will engage employees and build value as one of the most effective ways to support the community through volunteerism and financial support.

The campaign also should provide a source of information and, when needed, help for employees much the way an EAP (employee assistance program) would. It should utilize the most user-friendly technology that integrates with the company's existing employee relations and communications platform. Above all, everyone agrees that the campaign of the future must be cost efficient.

Here is what company representatives, charities and consultants predict will be a part of the workplace giving campaign of the future.

Allowing giving year-round. The campaign will be open and available to employees on a year-round basis but will include an enrollment/marketing period for several weeks once a year.

Offering multiple ways for employees to give. The workplace campaign will be closely tied with employee volunteerism and matching gift programs. Employers will offer employees multiple opportunities to participate in charitable activities either through the giving of time or making a financial contribution. Companies increasingly will match employee payroll deduction gifts made through the campaign.

Establishing individual giving accounts. Employees will be able to separate the decision on how much to give to charity and where to give. They will be able to establish personal giving accounts/donor-advised funds as a holding place for their payroll deduction gifts until they are ready to make the decision on who will be the recipient charities of their gifts.

Requiring higher standards of accountability. The ability for donors to research and obtain information about charities will push the standard of accountability by charities to a higher degree of efficiency.

As advocates for more effective employee workplace campaigns, America's Charities, TCN and the participating companies in this research project call upon employers across America to review this report and thoughtfully consider implementing the recommendations it contains.

Changing Direction: Call to Action

While there have been significant changes to the workplace giving campaign since the original *Campaigns at the Crossroads* was released nearly six years ago, some things have not changed. The commitment of employers to a successful program is still the primary success factor.

The need for this commitment is as great today as it was when the original report was released. Campaign coordinators continue to cite the lack of management support and resources as a barrier to an effective program. Best practices used in other areas of business activity are often ignored when it comes to conducting a campaign.

As advocates for more effective employee workplace campaigns, America's Charities, TCN and the participating companies in this research project call upon employers across America to review this report and thoughtfully consider implementing the recommendations it contains. Three steps are offered to help begin the process.

1. Conduct a thorough assessment of the employee workplace campaign and identify employee attitudes and perceptions about your current program.
2. Ensure your workplace culture is supportive of the campaign and all employee involvement activities.
3. Develop specific strategies to support a program that increases employee satisfaction, involvement and participation in the campaign.

More than ever, the concept of "doing well by doing good" makes sense for American employers who are both dependent on the loyalty and commitment of their employees and the well-being of our communities. A well-planned workplace-giving campaign plays a role in helping employers achieve these goals.

Strategies and Recommendations to Grow Giving in Your Campaign

- Build a business case to support a strong employee giving program.
- Brand the campaign and integrate it with other employee involvement activities.
- Seek opportunities to actively involve senior and middle management.
- Evaluate employee perceptions and attitudes about charitable giving and the campaign.
- Consider holding a focus group of younger employees to seek input on strategies that will appeal to them.
- Expand the giving campaign to include a portfolio of approved charities that meet business objectives and the charitable interests of employees.
- Match employee contributions with corporate dollars.
- Provide a strong informational and educational component to the campaign so employees know the recipient charitable organizations and can learn about the impact of their individual contribution.
- Offer employees multiple ways to get involved – be a volunteer, make a financial contribution or support a fundraising event.
- Provide opportunities for employees to interact with recipient charities and to learn more about the services they provide.
- Adapt technology to support the campaign but maintain a “personal touch” through education and events.

More than ever, the concept of “doing well by doing good” makes sense for American employers who are both dependent on the loyalty and commitment of their employees and the well-being of our communities. A well-planned workplace-giving campaign plays a role in helping employers achieve these goals.



Appendices

The appendices contained in this report are designed to provide companies with the tools to undertake the three-step process outlined in the Call to Action. Companies are being asked to:

- Conduct a thorough assessment of the employee workplace campaign and identify employee attitudes and perceptions about your current program.
- Ensure your workplace culture is supportive of the campaign and all employee involvement activities.
- Develop specific strategies to support a program that increases employee satisfaction, involvement and participation consequently raising more money for charity and improving life in local communities.

Appendix A is a self assessment tool that employers can use to evaluate their internal programs.

Appendix B is a sample employee survey instrument that can be used to identify employee attitudes and perceptions about the campaign.

Appendix C provides an outline of a campaign plan. Preparing a comprehensive written plan incorporating these elements will help ensure that the program is built upon proven strategies.

Appendix D is a partial listing of companies that have expanded the workplace giving campaign to include organizations in addition to United Way.

Appendix E is a listing of America's Charities members.

Appendix F is a listing of the Boards of Directors of America's Charities, ChildrenFirst - America's Charities, and HealthFirst - America's Charities.

If your company doesn't currently conduct a campaign or would like more information about effective strategies, contact Edwin Washington at 800-458-9505, ext. 5363, or by email at EWashington@Charities.org.

APPENDIX A

Employee Giving Campaign Self Assessment Tool

Name of Company _____

Total Number of Employees _____

At headquarters _____ At Operating Units _____

Number of Operating Units _____

Is the workplace campaign organized on a company-wide basis or does each operating unit/
location takes responsibility for its own program components?

Company-wide _____ Organized by unit/location _____

Do you match employee contributions?

Yes _____ No _____

Complete the following table, and then answer the questions below to identify the trends in your workplace giving program.

YEAR	200 <input type="text"/>	200 <input type="text"/>	200 <input type="text"/>
Total Campaign Revenue	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Percent of Employee Participation	% <input type="text"/>	% <input type="text"/>	% <input type="text"/>
Average Gift	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Total Number of Employees	<input type="text"/>	<input type="text"/>	<input type="text"/>
Number of Leadership Givers	<input type="text"/>	<input type="text"/>	<input type="text"/>
Amount Raised Through Leadership Giving	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>

What is the current trend in total dollars raised?

- _____ The total dollars raised is increasing.
- _____ The total dollars raised is decreasing.
- _____ There has been no significant change in the total dollars raised.

What is the trend in employee participation?

- _____ Employee participation is increasing.
- _____ Employee participation is decreasing.
- _____ There has been no significant change in the percentage of employees participating.

Where is the growth in the campaign coming from?

_____ An increase in the average gift.

_____ More employees participating in the campaign.

Please complete the following checklist and evaluate your company's use of Best Practices to maximize the employee giving program.

Best Practice	Does your company employ this Best Practice?	Rate your program as to the effective implementation of this strategy using the scale of 1 Not Effective to 5 Highly Effective				
Culture that is supportive of a strong employee giving program.	Yes No	1	2	3	4	5
Executive endorsement and commitment to a strong workplace giving program.	Yes No	1	2	3	4	5
Plan that clearly outlines the goals, objectives and strategies of the campaign.	Yes No	1	2	3	4	5
Branded campaign with a name, theme and logo that fits the unique workplace culture and employees' charitable interests.	Yes No	1	2	3	4	5
Workplace giving program integrated with other employee involvement activities such as matching gift and volunteer programs.	Yes No	1	2	3	4	5
Understand past performance by looking at trends in employee giving, total dollars raised and employee satisfaction.	Yes No	1	2	3	4	5
Process to measure and evaluate employee perceptions and interests.	Yes No	1	2	3	4	5
Visible and active involvement of senior officers in the campaign.	Yes No	1	2	3	4	5
Middle management support that allows worktime for campaign volunteer training, employee meetings and educational activities.	Yes No	1	2	3	4	5
Employee steering committee to develop the plan and oversee its implementation.	Yes No	1	2	3	4	5

Best Practice	Does your company employ this Best Practice?	Rate your program as to the effective implementation of this strategy using the scale of 1 Not Effective to 5 Highly Effective				
Information about the participating charities so employees can make an informed giving decision.	Yes No	1	2	3	4	5
Variety of communication resources to reach employees, to market the program and to educate employees.	Yes No	1	2	3	4	5
Employee meetings and/or events to enable employees to interact with the participating nonprofit agencies.	Yes No	1	2	3	4	5
Campaign offers employees the opportunity to support a wide range of organizations and issues that are important to them.	Yes No	1	2	3	4	5
Participating charities meet the highest ethical and financial standards.	Yes No	1	2	3	4	5
Electronic employee giving program that makes it easy for employees to contribute.	Yes No	1	2	3	4	5
A cost-effective means to process pledges and distribute payment to recipient nonprofit organizations.	Yes No	1	2	3	4	5
Technology to monitor campaign progress and provide feedback to campaign volunteers throughout the process.	Yes No	1	2	3	4	5
Use of technology with proven practices like face-to-face solicitation.	Yes No	1	2	3	4	5
Recognition to campaign volunteers and employees.	Yes No	1	2	3	4	5

Complete the assessment by adding up the total points of your program effectiveness and use the following as a guide to determine the effectiveness of your campaign.

- A score of 90+ indicates your program is among the nation's best.
- 80 – 90 points indicates a solid program.
- 60 – 80 points indicates opportunity for improvement
- Less than 60 points suggests your program is not as effective as it could be.

Planning for the Future

Based upon the previous assessment, identify specific strategies your organization could undertake to improve performance.

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

APPENDIX B

Employee Giving Campaign

Employee Survey

1. Are you aware that (Name of Employer) has conducted an annual workplace giving campaign for many years?

____ Yes ____ No

2. What is your overall opinion of the employee workplace giving campaign?

____ Very favorable

____ Somewhat favorable

____ Favorable

____ Somewhat unfavorable

____ Very unfavorable

____ Was not aware of the employee giving campaign

Comments: _____

3. Did you contribute to the employee giving campaign last year?

___ Yes ___ No (skip to question 6)

4. Listed below are several factors that may have influenced your giving decision. Please indicate to what extent each of the following factors affect your decision to participate in the employee giving program.

Factor	Greatly Affected				Did Not Affect
	5	4	3	2	
I was personally asked by someone I knew	5	4	3	2	1
I feel I have a responsibility to help others	5	4	3	2	1
The company will match my contribution	5	4	3	2	1
My co-workers and/or boss expect me to give	5	4	3	2	1
It makes me feel good	5	4	3	2	1
I can give by payroll deduction	5	4	3	2	1
I give for tax reasons	5	4	3	2	1
I have been personally affected by the charity	5	4	3	2	1
I am personally involved with a charity	5	4	3	2	1
I like the on-line giving system	5	4	3	2	1
I feel my contribution is kept confidential	5	4	3	2	1
Charity options are of interest to me	5	4	3	2	1
Other (please comment below):	5	4	3	2	1

Comments: _____

5. In the last five years, has the amount of your annual charitable giving through the employee giving campaign changed over time?

☐ Yes, my giving amount has increased
 ☐ Yes, my giving amount has decreased
☐ No, my giving has remained the same

Comments: _____

6. Do you contribute to charity, outside of the employee giving campaign? ☐ Yes ☐ No

7. If you did not choose to contribute to the employee giving campaign, what influenced your decision?

Factor	Greatly Influenced				Did Not Influence
Household income	5	4	3	2	1
I give directly to the organizations I choose to support & do not feel the need to contribute through my workplace	5	4	3	2	1
The charity choices provided did not include my favorite organizations	5	4	3	2	1
I prefer to donate my time rather than my money	5	4	3	2	1
I could not find an organization to support	5	4	3	2	1
Pressure from boss or co-workers	5	4	3	2	1
Was not aware of the giving campaign	5	4	3	2	1
Other (please comment below):	5	4	3	2	1

Comments: _____

8. What factors might entice you to contribute to next year's employee giving campaign?

Factor	Greatly Entice				Might Entice
	5	4	3	2	
More giving options	5	4	3	2	1
More opportunities to learn about the charities	5	4	3	2	1
Awareness of the campaign	5	4	3	2	1
More activities related to the campaign	5	4	3	2	1
Follow up information from the charities	5	4	3	2	1
An online giving system where my pledge is confidential	5	4	3	2	1
Matching gift offered	5	4	3	2	1
Assurance that 94-100% of my gift will reach my designated charity	5	4	3	2	1
Prize drawing incentives	5	4	3	2	1
Other (please comment below):	5	4	3	2	1

Comments: _____

9. How do you feel about the employee giving campaign solicitation process?

☐ Very comfortable ☐ Comfortable
☐ Uncomfortable ☐ I was not solicited for the employee giving campaign

Comments: _____

10. What changes would you like to see in our employee giving campaign?

APPENDIX C

Employee Giving Campaign

Developing a Campaign Plan

You have the opportunity to design a successful and fun campaign that fits your organization's culture. A workplace campaign can be a great team builder and morale booster. The following are components of an effective campaign plan. By addressing the following areas you are bound to meet with success by increasing participation, total giving and employee enthusiasm.

- 1. Assess campaign practices and performance.**
- 2. Set campaign dates and establish a time line.**
 - Determine the best time of year to run the campaign given workplace culture, business priorities and other community relations initiatives.
 - Begin planning a minimum of three months in advance of the campaign kick-off.
 - Don't drag it out. Depending on the size of your organization a three- to four-week campaign is probably ideal.
- 3. Determine structure and establish organization.**
 - Obtain the active and visible support of senior management.
 - Develop an employee committee to plan and "own" the campaign.
 - Recruit campaign champions in each major location to coordinate the campaign locally.
- 4. Set goals and identify specific strategies to achieve goals.**
 - Set goals that are achievable and measurable, yet challenging. Goals may be set on overall dollars, employee participation and/or response rate.

5. Determine technology needs.

- Identify how employees will record their pledge (paper or electronic pledge form).
- Understand logistical issues such as collection of pledge cards, reporting and distribution of funds to recipient charities.

6. Create a comprehensive marketing and educational plan.

- Develop a campaign theme.
- Develop several key campaign messages that you want to communicate to employees. Use these messages throughout the campaign promotional materials.
- Have the CEO or other senior leadership publicly endorse the campaign by letter, email or other means.
- Conduct campaign events: kick-off, socials, or charity fairs.
- Create personalized campaign materials that incorporate the organization's logo, colors and messages.
- Provide information to employees that will help them understand the services provided by the participating charities.
- Communicate with employees throughout the campaign.

7. Provide recognition to volunteers and employees.

- Thank and reward volunteers...small tokens of gratitude are appreciated and will spread the goodwill of the campaign and encourage further volunteerism.
- Recognize employees who make a contribution.

APPENDIX D

A Sampling of Companies with Expanded Giving Campaigns in One or More Locations

3 Com	Gannett	Pitney Bowes
Abbott Laboratories	The Gap	PRC
Accenture	GMAC-RFC	PricewaterhouseCoopers
ADC Telecommunications	GXS	Progress Energy
Adobe Systems	HBO	Prudential
Aetna	Hewlett Packard	Raytheon
Allstate Insurance	Hospira	Safeco
American Airlines	HSBC - North America	Samsung Semiconductor
American Express	IBM	Schering-Plough Corporation
American Psychological Association	Kaiser Permanente	Siemens
Amerigroup	Keane, Inc.	Sikorsky Aircraft
AmeriPrise Financial	Kimberly-Clark	STL Labs
Avon	Lawson Software	Thomson West
Boston Scientific	Lenscrafters	United Health Group
Cardinal Health	Lockheed Martin	United Technologies
Caremark Rx, Inc.	Loral Skynet	USA Today
Clorox	Lucent Technologies	Walgreen's
CNA Insurance	MacArthur Foundation	Wal-Mart
CNL	McKesson	Walt Disney Company
C.R. Bard, Inc.	Mervyn's	Washington Gas
Cummins, Inc.	Microsoft	Wells Fargo
Dell Computer Corporation	Miller Zell	Winn Dixie
Duke Energy	NASD	
DynCorp	New York Times	Also ...the U.S. Government and
Educational Testing Services	Olin Corporation	hundreds of other private and
ExxonMobil	Pearson Education	public sector employers.
Freddie Mac	Pepco	
	PG&E Corporation	

APPENDIX E

America's Charities Members



National Members

100 Black Men of America
American Campaign for Prevention of Child Abuse and Family Violence
American Center for Law and Justice
American Civil Liberties Union Foundation
America's Second Harvest - The Nation's Food Bank Network
Amnesty International of the USA
Asian American Legal Defense and Education Fund
Best Friends Animal Society
Braille Institute of America
Canine Partners For Life
Catholics United for Life
Christian Appalachian Project
Consumers Union of United States
Diabetes Research and Wellness Foundation
Dress for Success Worldwide
Eagle Forum Education and Legal Defense Fund
Feed The Children
The Fund for Animals
GlobalGiving Foundation
Goodwill Industries International, Inc.
Human Rights Campaign Foundation
The Humane Society of the United States
The Jane Goodall Institute for Wildlife Research, Education and Conservation
LULAC National Educational Service Centers
Make-A-Wish Foundation® of America
Mothers Against Drunk Driving
NAACP Legal Defense and Educational Fund
NAACP Special Contribution Fund
National Law Enforcement Officers Memorial Fund
National Trust for Historic Preservation in the United States
Native American Rights Fund
Orphan Foundation of America
PetSmart Charities
Point Foundation, The National Gay & Lesbian Scholarship Fund
Population Connection
Puerto Rican Legal Defense and Education Fund
The Rutherford Institute
Southern Poverty Law Center
Vietnam Veterans of America Foundation



ACTION for Child Protection
Believe In Tomorrow National Children's Foundation
Cancer Research for Children (National Childhood Cancer Foundation)
Childhelp USA®
Children's HeartLink
The Children's House at Johns Hopkins

Children's Leukemia Research Association
 Children's Rights
 Coptic Orphans Support Association
 Father Flanagan's Boys' Home
 Give Kids The World
 The Grace Children's Foundation
 The Hole In The Wall Gang Fund
 "I Have a Dream"® Foundation
 Junior Achievement
 National Black Child Development Institute
 Prevent Child Abuse America
 Reading Is Fundamental, Inc. (RIF)
 Ronald McDonald House Charities®
 Special Love (for Children With Cancer)
 STANDUP FOR KIDS
 Starlight Starbright Children's Foundation
 Teach For America
 Tiger Woods Foundation, Inc.
 Youth Service America



AIDS Alliance for Children, Youth & Families
 American Foundation for the Blind
 The Arc of the United States
 Black Women's Health Imperative
 Breast Cancer Coalition
 Cancer Research and Prevention Foundation
 Christopher Reeve Foundation
 Diabetes Research Institute Foundation, Inc.
 Dystrophic Epidermolysis Bullosa Research
 Association of America

Hospice America (American Hospice Foundation)
 International Planned Parenthood Federation,
 Western Hemisphere Region
 International Rett Syndrome Association
 Lance Armstrong Foundation, Inc.
 Margaret Sanger Center International
 Multiple Sclerosis Association of America
 NARAL Pro-Choice America Foundation
 National Association of the Deaf
 National Down Syndrome Society
 National Marfan Foundation
 National Organization for Rare Disorders (NORD)
 Ovarian Cancer Research Fund
 Tuberous Sclerosis Alliance



Local Members

ARIZONA

Ballet Arizona
 Goodwill of Central Arizona
 Great Arizona Puppet Theater
 Phoenix Boys Choir
 Phoenix Museum of History

CALIFORNIA

Breathe California of Los Angeles County
 Goodwill Southern California
 Hollygrove Children & Family Services
 Hope-Net
 LA's BEST (Better Educated Students for Tomorrow)
 Optimist Youth Homes & Family Services
 Padres Contra El Cáncer

Shelter Partnership, Inc.
Special Olympics Southern California
Streetlights
Young Horizons

CONNECTICUT

Connecticut Food Bank

FLORIDA

A Gift For Teaching
A Gift For Teaching of Tampa Bay
Camp Boggy Creek
Central Florida Zoological Society
Children's Dream Fund
Christian HELP Foundation
Christian Sharing Center
Community Vision
Family Resources, Inc.
Florida Literacy Coalition
Foundation for Orange County Public Schools
The Foundation for Osceola Education
Freedom Ride
Frontline Outreach
Hillsborough Education Foundation
Hispanic Business Initiative Fund of
Greater Orlando
The Hospice Foundation of the Florida Suncoast
Hospice of the Comforter
Kids Beating Cancer
La Amistad Foundation (Lakewood Center)
Lighthouse of Pinellas, Inc.
New Hope for Kids
Pinellas Education Foundation
Pinellas Habitat for Humanity

Planned Parenthood of Greater Orlando, Inc.
R'Club Child Care
SPCA of Central Florida/Orlando Humane Society
Special Olympics Florida
Step Up For Students
Teen Challenge of Florida

GEORGIA

Habitat for Humanity-Atlanta

ILLINOIS

Jesus Is The Way Prison Ministry

MICHIGAN

Arts League of Michigan
Association of Chinese Americans, Inc.
Charles H. Wright Museum of African
American History
Detroit Catholic Pastoral Alliance
Freedom House
The Guidance Center
The Information Center, Inc.
International Institute of Metro Detroit
Kids Kicking Cancer
Lawrence P. Doss Scholarship Foundation
Mexicantown Community Development
Corporation
Simon House
Special Olympics Michigan
Sweet Dreamzzz Detroit
Triangle Foundation
Warren/Conner Development Coalition (W/CDC)

NORTH CAROLINA

Time Out Youth

NEW JERSEY

Brain Injury Association of New Jersey

Canine Hearing Companions, Inc.

Daytop Village of New Jersey, Inc.

Dress for Success - Jersey City

The Institute for Children With Cancer and
Blood Disorders

Kids Corporation II

The New Jersey Center for Outreach & Services for
the Autism Community (COSAC)

New Jersey Interfaith Partnership for
Disaster Recovery

Partnerships For People

Ramapo-Bergen Animal Refuge, Inc.

NEW YORK

Fertile Hope

Freedom Guide Dogs for the Blind

Mount Hope Housing Company, Inc.

PENNSYLVANIA

AIDS Resource Alliance

Angels' Place, Inc.

Center for Lesbian and Gay Civil Rights

Crisis Shelter of Lawrence County

Family Support Line of Delaware County

Laurel Arts

Mission of Mercy, Inc.

Pennsylvania Coalition Against
Domestic Violence

Pennsylvanians for Human Life Educational
Trust Fund

Philadelphia Cares

Philadelphia Young Playwrights

Real Alternatives

Somerset County Campus Foundation for
Allegany College of Maryland

SPCA of Luzerne County, Inc.

Visual Impairment and Blindness Services of
Northhampton County

Women's Community Revitalization Project
Womens Way

RHODE ISLAND

Rhode Island Community Food Bank

TENNESSEE

You Have The Power

TEXAS

Caring for Children Foundation of Texas

Heart House of Austin

Marywood

Shoes for Austin

Texas Network of Youth Services

VSA arts of Texas

APPENDIX F

America's Charities Board of Directors



Board of Directors

Chair

Leon Feinerman

Vice President, American Insurance Administrators

Vice Chair

Steve Delfin

Executive Director, National Credit Union Foundation

Secretary

Linda Landman-Gonzalez

Director of Diversity and Community Affairs, Darden Restaurants, Inc.

Treasurer

Robert J. Dunfey, Jr.

Dunfey-Shield Hotel Management

Erline Belton

CEO, Lyceum Group

Ken Berez

Consultant

Chuck Bolte

Senior Vice President, Creative Services, Alliance Defense Fund

Marcia L. Bullard

President & CEO, USA WEEKEND

Sandra Byrd

Vice President, Presbyterian Homes & Family Services

Charlotte Coker Gibson

Washington Metro - Diversity & WorkLife Leader, PriceWaterhouse Coopers

Martin J. Coyne, Jr.

Vice President and COO, Ronald McDonald House Charities®

Thomas W. Dortch, Jr.

Chairman/CEO, TWD, Inc.

James Ewalt

Consultant, The ERIPS Group

Patrick R. Gaston

President, Verizon Foundation

Richard Glasow, Ph.D.

Consultant

Thomas Gregory

Vice President, Corporate Advancement, Father Flanagan's Boys' Home

W. Michael Gretschel

President, Diabetes Research and Wellness Foundation

Bill Halamandaris

President, Heart of America Foundation

Steven M. Kaufman

Partner, Hogan & Hartson LLP

Julia Kivistik

Executive Vice President - Cause Branding, Cone Inc.

Greg McLaughlin

President, Tiger Woods Foundation, Inc.

Drummond Pike

President, Tides Foundation

Richard L. Roybal

Executive Director, LULAC National Educational Service Centers

Peter Wilderotter

Vice President of Development, Christopher Reeve Foundation

David Williams

President and CEO, Make-A-Wish Foundation® of America



Board of Directors

Chair

Paul T. Burke

President, Cancer Research for
Children (National Childhood
Cancer Foundation)

Vice Chair

Edward Dandridge

Managing Partner,
BRANDSPHERE

Secretary

George Kroloff

Consultant, George Kroloff
& Associates

Edward Dandridge

Managing Partner,
BRANDSPHERE

Stacey D. Cunningham

Senior Program Associate,
National Black Child
Development Institute

Richard L. Koca, Sr.

Founder & CEO,
STANDUP FOR KIDS

Nermien Riad

Executive Director,
Coptic Orphans Support
Association

Don Sodo

President/CEO,
America's Charities



Board of Directors

Chair

Dan Feller

Diabetes Research Institute
Foundation

Vice Chair

Michael J. Coburn

Chief Operating Officer, The Arc
of the United States

Secretary

Douglas G. Franklin

President and CEO,
Multiple Sclerosis Association
of America

Treasurer

Carolyn Levering

President and CEO,
National Marfan Foundation

Jean Campbell

VP of Development, National
Organization for Rare Disorders
(NORD)

John Glenn

VP, Group Creative
& Technology Director, Kinect
Corbett Accel Healthcare Group

Jan Mahrer

Executive Vice President and
Chief Operating Officer, Cancer
Research and Prevention
Foundation

Naomi Naierman

President and CEO,
Hospice America (American
Hospice Foundation)

Don Sodo

President/CEO,
America's Charities

APPENDIX G

America's Charities Staff

ADMINISTRATION

Don Sodo

President and CEO

Arnold G. Swope

Executive Vice President
and COO

Lisa Jones

Senior Executive Assistant/Office
Manager

Claudia Masias

Receptionist/Administrative Aide

COMMUNICATIONS

Rick Gondella

Director, Communications

Tamara Bibby

Account Services Coordinator

Saida Oliver

Communications and Media
Relations Specialist

FIELD OPERATIONS

Edwin D. Washington

Director, Field Operations

Roseanne Wark

Field Operations Coordinator

Tamara Bibby

Account Services Coordinator

Randy Gustavus

Regional Director – Western
Region

Gail Knight

Regional Manager, Campaign
& Community Development –
Western Region

Scott Black,

Regional Director – Eastern
Region

Regina Hendrix,

Regional Manager, Campaign
& Community Development –
Eastern Region

Bill Reid,

Regional Manager, Campaign
& Community Development –
Southeastern Region

Liz Fitzgerald

Regional Manager, Campaign
& Community Development –
Southwestern

Donna Chun

Regional Director – Florida

FINANCE & SYSTEMS ADMINISTRATION

Scott Schaefer

Chief Financial Officer/
Director, Finance & Systems
Administration

Pam Walker

System Wide Database
Administrator

Sook Suragiat

Senior Accountant

Maria Elena Duenas

Staff Accountant

FISCAL SERVICES

Denise Gustafson

Director, Fiscal Services

Lavelle Valenton

Fiscal Account Manager

Catherine O'Connor

Fiscal Account Manager

Ruth Owens

Fiscal Services Manager

MEMBER & CAMPAIGN SERVICES

Barbara Funnell

Director, Member & Campaign
Services

Wendy Sall

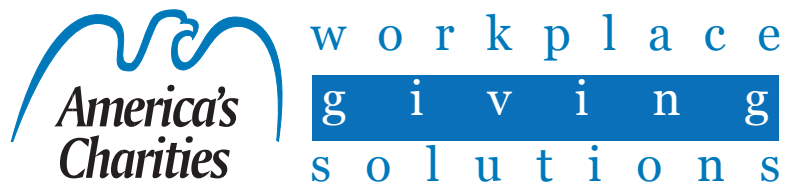
Senior Member & Campaign
Services Coordinator

Robyn Neal

Member & Campaign Services
Coordinator

Yvonne Wiley

Member & Campaign Services
Coordinator



Find out more about America's Charities at www.charities.org

America's Charities participates in campaigns at:

AAA National Headquarters

American Airlines

American Express

AT&T

Avon Products

Boston Scientific Corporation

ExxonMobil

Hewlett-Packard Company

Lockheed Martin

NASD

Siemens

The United States Government [CFC]

...and hundreds of other employers

Helping You Help Others.

Since 1980, America's Charities has helped employers get the most out of charitable giving campaigns in the workplace.

Since 1980, America's Charities has helped employers achieve their employee involvement and charity giving goals in workplace campaigns.

America's Charities members are among the best-known and most respected national and local charities in the United States, including the Make-A-Wish Foundation, Ronald McDonald House Charities, NAACP, Reading is Fundamental, and Humane Society of the United States.

Our charities serve or are helped by your employees in hundreds of local communities. As a result, 70 percent of employees want additional charities in their campaigns, beyond the United Way.

America's Charities has a 25-year track record, working with employers and distributing over \$400 million in contributions from employees to their favorite charities.

America's Charities:

- **H**elps companies develop their own branded and customized campaign based on their strategic employee involvement, community relations and philanthropy goals;
- **D**istributes up to 100 percent of employees' gifts to their designated charities, offering PledgeFirst, a premier on-line giving system that includes a customized website, content control, real-time reports, surveys and more;
- **R**emoves administrative burden, so companies run a single campaign, with the charity choices employees want and care about, as well as choices offered in the past – including United Way;
- **O**ffers a varied and diverse list of charity choices for employees as selected by each employer;
- **I**ntegrates the campaign with existing employee involvement programs;
- **I**ncreases employee satisfaction and overall campaign giving;

Why America's Charities?

The benefits of including America's Charities in your employee-giving campaign:

- Surveys and focus groups show that about 70% of employees want the choice of charities in addition to United Way;
- Employee satisfaction, participation and giving increase when America's Charities participates in a campaign;
- Employers want to provide employees with charities that mirror the interests and diversity of the workforce;
- Within employee health and pension benefit packages, or within their work schedule, more choices are offered today than in the past;
- America's Charities encourages employees to designate their gift to a specific charity...and 98% choose to do so among all of our campaigns;
- America's Charities acknowledges that the campaign belongs to the employer and employee and pressure to give should have no part in workplace campaigns.



The online workplace giving solution



Relieving administrative burden...

Creating a more satisfying giving experience...

Completely web-based...

Brandable...

Secure...

Reports in real-time...

Focused technology
customizing workplace
giving campaigns.

Lowest cost,
highest contributions
to charities.

PledgeFirst users include:

American Psychological Association
Avon Products
GenCorp
Global eXchange Services (GXS)
Lockheed Martin
McKesson
Washington Gas
and more...

...the *NO COST* solution for on-line workplace giving campaigns.

- Completely web-based! Any company with Internet access can use the PledgeFirst system.
- Completely customizable content- Companies control the look, feel and message!
- Brandable - Bring your company's message directly to employees' desktops.
- Volunteer event management module available - Publicize volunteer events to employees, track and manage resources, track employee volunteer hours.
- Secure, 128-bit encrypted site.
- Donors can participate from anywhere, at any time, via the Internet.
- Can be used for other special campaigns, e.g. disaster relief.
- Donors can search for their favorite charities by keyword, and can pledge, request information about volunteering, or about issues and concerns that affect them directly - ALL ONLINE!
- Reports in real-time! Administrators can see the progress of contributions, participation, most-selected charities in up-to-the-second reports that can viewed and printed from an Internet browser, or downloaded to popular spreadsheet programs.
- Eliminates the effect of shrinkage and unfulfilled pledges, through regular reconciliation with payroll records.
- No data entry - 98% of the administrative burden of campaigns has been removed.
- Integratable with employee involvement programs.
- Supports matching gifts.
- No cost - Comparable systems come with a price tag of \$50,000 or more!
- Highest percentage of employee gifts to charities - at least 94%, or **100% when the employer underwrites the campaign.**

Visit www.charities.org to find out more about PledgeFirst.

The American tradition of conducting employee giving campaigns in the workplace is changing dramatically.

With hundreds of public and private sector employers customizing and branding their campaigns, the United Way's dominant role in workplace giving has been greatly diminished.

Responding to the strategic interests of employers and employees' support for a variety of causes, additional charity choices have been added to the workplace campaign. Here's what we've learned about this valued tradition that raises nearly \$2 billion annually from employee giving:

- From 2000-2003, the number of individuals giving to United Way dropped by more than 3 million donors. (page 17)
- Some 55 percent of *Fortune* companies now include charity choices beyond the United Way. (page 30)
- More than 70 percent of employees in campaigns with payroll deduction would like more charity choices. (page 23)
- More than 60 percent of *Fortune* 500 companies now provide an electronic campaign option. (page 20)
- Employer matching of employee contributions positively impacts all measures of campaign success. (page 31)
- Courts have held that public sector employers which have a campaign with at least one organization, must have procedures for others to participate. (page 16)

A successor to the highly praised *Campaigns at the Crossroads: Recommendations for Revitalization*, this report, *Changing Direction* is based on original and compiled research, employer surveys and interviews with leading stakeholders in the \$2 billion marketplace of employee contributions through workplace giving.

Changing Direction describes how many public and private sector employers have taken the initiative to develop their own successful campaigns, based on their values, employee-interests, and strategic goals. These new customized campaigns, using technology and best practices, are building employee loyalty and participation.

Case studies of campaigns at **American Express, Thomson West, City of Austin, City of Orlando, McKesson, NASD and ExxonMobil in Fairfax, VA** show how these employers are applying technology, best practices, employee involvement, leadership, expanded charity choice and donor recognition to build successful campaigns.

America's Charities has distributed nearly \$400 million to its members and thousands of other charities from coast-to-coast from workplace giving campaigns. America's Charities mission is to provide employers and employees with efficient, effective, low-cost charitable giving campaigns; to offer a broad range of charitable choices that reflect the diversity of the American people; and to provide member charities with the resources required to meet their needs.



The Consulting Network (TCN) is a national consulting firm specializing in the areas of corporate citizenship, community and employee involvement and contribution management.

The firm maintains Corporate Citizenship: Benchmark Center, based upon its work in benchmarking corporate, nonprofit and education programs, to provide measures of financial and program comparison that can be used to evaluate peer and best-in-class programs.



TCN is a recognized leader on the subjects of corporate citizenship and employee involvement. The firm has contributed to a number of publications on the topic of corporate citizenship.