EMPLOYEE WORKPLACE CAMPAIGNS
AT THE CROSSROADS
Recommendations for Revitalization

Research and tools to help employers increase the value of giving and caring through the employee workplace campaign.

A collaborative project of America’s Charities and The Consulting Network
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Introduction

This project was initiated by the growing need to provide research, examples and recommendations to increase the value of giving and caring through the employee workplace campaign.

The employee workplace campaign, a historic and valued tradition, is evolving and at the crossroads. Despite the nearly $4 billion raised annually in the campaign, trends reveal declining participation by employees. This often translates into less support for worthy charities. To address this development, new models are emerging. Changes in the traditional approach to workplace giving are affecting the ownership of the campaign, the range of charities eligible to participate and even how the campaign is being marketed to employees.

America’s Charities, a federation of premier national charitable organizations, and The Consulting Network, a national management consulting firm, teamed up to address the issue of revitalizing the employee workplace giving campaign. Together, we asked key executives from top public and private sector employers about their concerns and their ideas on how to develop new and more successful campaigns. Twenty individuals, representing the public, private and nonprofit sectors, agreed to participate on the National Advisory Council for this project. They shared their perspectives about current issues and trends and developed recommendations for other employers. A roster of the National Advisory Council appears on the opposite page.

The Council identified key components of a workplace campaign in the new century. The campaign may look vastly different from what we’ve grown to expect. Certainly, employees will have a greater role in designing and managing the campaign, and technology will play a key role in administering the campaign and educating employees.

Visit Campaigns at the Crossroads at www.charities.org to download and print this report, including tools for assessing the campaign.

We believe companies that choose a new direction and implement these recommendations will be more likely to involve their employees in an activity that workers will find engaging, informative, productive and fun. The services made possible by employee generosity will result in vital and healthy communities, and employees will garner satisfaction from helping others.

Don Sodo
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John F. Coy
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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, Habitat for Humanity International, Ronald McDonald House Charities, Shriners Hospitals for Children, NAACP, and American Foundation for the Blind have trusted America’s Charities to represent them in giving campaigns nationwide.

America’s Charities is a membership-based federation of approximately 100 charities participating in workplace giving campaigns administered through the federal government, state and local governments, and private sector corporations. America’s Charities members are presented as a choice to nearly 10 million Americans in the workplace each year.

Now in its twentieth year, the America’s Charities mission is to provide employers and employees with efficient, effective, low-cost workplace 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. America’s Charities members provide national and local services impacting civil and human rights, education, the environment, health and human service.

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The Consulting Network (TCN) is a national consulting firm specializing in assessment, strategic planning, program design and organizational and professional development in the areas of corporate citizenship, community and employee involvement and contributions. John F. Coy is founder and president.

Over the course of the last ten 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 companywide strategy through volunteerism, the employee workplace campaign, employee-directed grant programs, matching gift and incentive programs, and communications and recognition.

The firm’s work in benchmarking corporate, nonprofit and education programs has resulted in the establishment of the Corporate Citizenship: Benchmark Center, known as CC: BenchmarkCENTERSM. This resource provides measures of financial and program comparison that can be used to evaluate peer and best-in-class programs.

TCN publishes a quarterly newsletter for corporate managers and has contributed to a number of publications on the topic of corporate citizenship.
EMPLOYEE WORKPLACE CAMPAIGNS
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REPORT SUMMARY

Workplace Giving – A Valued Tradition
Workplace giving is a highly valued tradition offering benefits to employers, employees, nonprofit organizations and the people they help. It is one of the most significant resources employers offer to address community needs.

Employers Benefit
- Enhances company’s overall employee involvement program.
- Improves corporate image in the community and among key stakeholders.

Employees Benefit
- Provides personal satisfaction from helping others.
- Affords an opportunity to learn about organizations serving the community.
- Offers the ease and convenience of payroll deduction, which has a strong connection to giving, according to the 1999 Independent Sector survey Giving and Volunteering in the United States.

Charities Benefit
- Facilitates highest yielding, lowest cost method of fund raising.
- Accesses new donors and volunteers.

Communities Benefit
- Directs important resources to those who need them.
- Keeps vital services available.

The Workplace Environment
Employee charitable campaigns, like many workplace activities, are being shaped by trends in the marketplace as well as factors affecting the way people approach their jobs and link work to their professional and personal interests. Three primary trends stand out.

The employer/employee relationship is evolving. Mergers, downsizing, new economy start-up companies, employee empowerment, professional mobility, and the increasing pressure for financial performance have altered the employer/employee relationship. Employees have a new level of expectation of their employers.

Society and culture is being transformed by the electronic age. The power of the Internet and workplace intranets allow people to communicate, access information and connect with others from a distance. Every day, more employees have the means to find and utilize information that is key to their work and personal lives. Workplace culture has changed from employers telling employees what and how to do their jobs to providing employees with the information and environment necessary to conduct their jobs.
Employee involvement activities help integrate personal and professional interests. There is growing importance placed on employee involvement and partnerships with the company to integrate workers’ personal and professional interests. Team building activities, volunteer opportunities and company-supported athletic and social events are all directed at balancing work and personal life to enhance recruiting and retain the best and most competitive workforce possible.

Within this environment is the workplace campaign, where employees traditionally have been asked to consider their participation and financial support of community needs. It is tempting to dismiss one of the oldest employee involvement activities as being insignificant given the challenges most employers and employees now face. Some discount the value and role of the charitable campaign in today’s workplace setting. Others miss the connection between this extension of employee involvement and its link to being viewed as a preferred employer and exciting place to work.

The findings of this report suggest the employee workplace campaign can be an important part of an employer’s overall relationship with its employees. An effective campaign can send a message to employees about the employer’s social and community commitment, particularly as an integral part of the employer’s broader employee volunteer and community involvement strategy.

What is needed is a fresh look at how the campaign fits in today’s workplace environment; how it reflects evolving employer/employee relationships; and how it enables employees to be engaged in causes, organizations and activities close to their interests.

Although many employers have made sweeping changes in their work and employment culture, few have extended that change to the way they conduct their workplace giving campaign. This report focuses on those who have examined the value of this important activity and provides examples and suggestions for revitalizing one of America’s oldest and most generous employee involvement programs.

Current State of Workplace Giving

It is estimated that workplace giving provides nearly $4 billion annually to worthy charities. Despite this impressive figure and the benefits of the employee workplace giving campaign, the following warning signs indicate the traditional campaign is falling short of its potential to involve employees.

Employee participation is in decline. Only 35 percent of employees at companies with campaigns now give, compared to 47 percent a decade ago. It is estimated that this loss of employee participation results in about 5 million fewer donors. If participation had remained at the 47 percent achieved a decade ago, the workplace campaign would be raising an additional $500 million today.

Growth in medium and smaller employers that do not have an employee workplace campaign. Only about 25 percent of the public say they work in a company with a workplace giving campaign. That means a significant and growing segment of the employment population is not given an opportunity to support their favorite charities through a payroll deduction campaign.

Traditional campaigns do not recognize the new environment. Large employers and government entities have a long history of conducting campaigns. Most have been a United Way campaign. However, with a changing work environment that favors employee empowerment and involvement, the traditional campaign may no longer fit every workplace culture.
The following issues are symptomatic of the need to assess and revitalize the workplace giving campaign.

- Employee interest and participation in the campaign is declining.
- Younger employees are not as likely to give.
- The campaign has become time-consuming, costly and a burden to the company, especially data entry.
- Senior management does not get involved and support the campaign.
- Employees do not see the relevance or value of supporting the community through an umbrella organization like United Way.
- Charities that address new and emerging needs are important to employees, yet they often are not supported through the workplace campaign.

Employers now recognize that the campaign can be an effective tool to achieve employee and community relations objectives. There are indications change is taking place. The results of a survey of 100 American companies (Valuing Employee Involvement) published by The Consulting Network in 1998 revealed that 83 percent of those companies that conduct an employee workplace campaign (97 out of the 100) have an employee committee that manages and directs the campaign. About 30 percent of these companies now include federations and organizations other than United Way.

**Responding to employees’ interests is the single most significant factor in companies expanding the range of charities participating in their annual campaign.**

Nearly half of the companies that conduct a campaign report their campaigns operate independently of the local United Way designation policies. Responding to employees’ interests is the single most significant factor in companies expanding the range of charities participating in their annual campaign.

Given today’s environment, companies and employees want to design a workplace campaign that:

- Serves the interests of the company and its employees.
- Fits with employee involvement goals and encourages employee participation.
- Is efficient to administer at minimal cost.
- Offers more choices.
- Reduces negative pressure to give.

**Recommendations – Building a Campaign for the New Century**

1. **Assess the Current Campaign**

Most campaign assessments begin by:

- clarifying the company’s employee and community relations goals;
- reviewing campaign performance; and,
- identifying employee attitudes and perceptions, usually through a survey.

Based on the findings, new strategies can be developed to revitalize the campaign.
2. Make the Case for a Campaign

Highlight the employer, employee, charity and community benefits derived from a strong workplace giving program. Research shows satisfaction with charitable payroll deduction plans is quite high. According to the 1999 Independent Sector survey on giving and volunteering, among companies with a payroll deduction plan, 89 percent of employees want to continue it, while only 6 percent wish to discontinue it. Being able to give through payroll deduction also has a strong connection to giving outside the workplace.

Many companies are beginning to look at all of their employee involvement programs as a single package. This includes matching gifts, volunteer programs and the workplace giving campaign.

3. Integrate the Campaign with Employee Involvement Objectives

Many companies are beginning to look at all of their employee involvement programs as a single package. This includes matching gifts, volunteer programs and the workplace giving campaign.

Linking the campaign with other employee involvement activities is valuable. Integration serves to strengthen the campaign. Key factors in successfully integrating the campaign have been identified.

- Brand all employee involvement programs with a common name.
- Provide oversight by an employee committee.
- Include the workplace campaign in all promotional brochures and marketing activities for volunteer programs.
- Position the campaign as part of the overall community relations and employee involvement strategy.
- Offer to match donations made through the campaign.

4. Incorporate Technology

Perhaps no other tool has the potential to revolutionize the workplace campaign like emerging technology. However, whether the impact of new technology is positive or negative depends largely on how it is used. Companies that have replaced active, effective fund-raising campaigns with a passive approach solely utilizing technology as a solicitation and pledging mechanism have been disappointed. In most cases, total giving has declined due to fewer employees contributing.

Internet technology offers several advantages to the workplace campaign.

- Reach new donors. The Internet allows charities to access more people than they traditionally have been able to reach. Internet or online giving opportunities may help to cultivate a portion of the workforce that is not being reached, such as younger workers or those in smaller businesses.

- Provide information to employees. The Internet offers the opportunity to learn more about a charity. Research shows most people visit a charity’s Web site to determine:
  - how contributions are spent;
  - the confidentiality of the information that donors share with the charity; and,
  - the option to make a donation online.
Employer intranets with links to charity Web sites can be an effective resource for employees. Information that cannot be contained in a brochure can be placed easily on a Web site.

- **Support the administration of the campaign.** Technology can help companies reduce the cost of conducting a campaign by automating pledge processing. Some companies have outsourced this task to one of the nonprofit organizations that participate in the campaign or to a neutral pledge processing organization.

While technology can reduce costs and support the campaign, it should not replace the personal touch. The number one motivation for people to give to charity is because someone they knew personally asked them. It is important to continue to use volunteers to ask for donations and answer questions. Passively run campaigns are doomed to failure.

5. **Build the Campaign On Best Practices**

Through research the National Advisory Council identified eight practices that encourage participation in the campaign and should promote increased giving to charity.

- **Assume ownership and brand the campaign.**
  Companies should assume ownership of the campaign and brand it with a name, theme and logo that fits their unique corporate culture and responds to employee interests. The Sears You Can Make a Difference campaign is one example.

Many companies have achieved success by integrating the campaign with other employee involvement activities such as the matching gift and volunteer programs. The trend is for companies to expand the campaign by offering a portfolio of charitable organizations that support corporate interests and give employees a range of choice in directing their contributions to causes of interest to them.

- **Provide leadership to the campaign.**
  Most research on effective campaigns highlights the need for a culture that supports the campaign and involves senior officers. Some examples of how companies can provide leadership include the visible and active involvement of senior company officers in the campaign, a companywide leadership giving program for employees at all levels and an employee contributions matching program.

- **Review and assess current campaign performance and practices.**
  Companies that successfully revitalize their campaign have assessed their performance by looking at trends in employee participation and total dollars raised. Those companies developed a process to obtain continual feedback from employees. Perceptions of the campaign greatly influence the desire to participate. An annual evaluation should follow each campaign and be a key factor in planning for the next campaign. The more proactive companies conduct employee surveys and focus groups following each campaign to obtain input and feedback.

- **Allow for employee ownership and involvement.**
  Most companies are identifying opportunities to involve employees in a meaningful way. The campaign can energize employees. Many form an employee steering committee to develop and oversee the campaign.

- **Build a strong educational component into the campaign.**
  1998 United Way of America research showed the per capita gift increases from $96 to $122 when the company conducted a strong educational campaign among employees. Employees need and want to understand where their money is going and to know that the recipient agency will make wise use of their funds.
Use a variety of communication resources to market the campaign, such as the Internet, intranet, e-mail, voice mail, newsletters, posters and brochures.

- **Retain personal connection as much as possible.**
  Many companies now use e-mail and telephone response systems to collect employee contribution information. Technology also can be used to reduce administrative costs such as eliminating the time needed for tedious data entry. While these are effective tools, companies that have relied solely on technology to ask for a donation have been disappointed in the results. People still respond best to being asked personally to make a donation.

The National Advisory Council suggests the best use of technology is in the administration and marketing of the campaign, not in the solicitation phase.

- **Track and monitor results throughout the campaign.**
  Track results during the campaign to ensure that each employee has been given the opportunity to make an informed decision. According to United Way of America, the per capita gift increases in companies where goals are set and results are tracked by site and along organizational lines.

- **Implement an internal recognition/thank you program.**
  Individuals who are thanked are significantly more likely to be favorable to the workplace campaign than are donors who are not thanked, according to a December 1998 national public opinion poll conducted for United Way of America by Market Facts, Inc. Thanking the donor also seems to decrease the donor’s perception of pressure to contribute.

### 6. Create a Partnership Between the Company and Nonprofits

The nonprofit organizations selected to participate in the workplace campaign should be more than passive recipients of charitable donations. These organizations want to add value to the relationship by being a resource to both the company and its employees. In addition to nonprofit organizations’ experience in implementing workplace giving programs, they can provide information on research and trends, help companies promote environmentally conscious programs, assist with relief and disaster programs and organize international giving programs.

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### New Measures of Success

The total amount of dollars raised, percent of employee participation and the average gift per contributor are becoming secondary performance measures in the new employee workplace campaign. The campaign of the new century emphasizes indicators that are equally, if not more, important in determining the success of the employee workplace campaign.

This report identifies five key indicators companies are using to determine the success of their campaign.

1. The campaign is integrated with the company’s employee involvement program.

2. The campaign is branded to fit the company’s unique culture and includes organizations that are relevant to employees and their charitable and volunteer interests.
3. The campaign provides opportunities for employee involvement and team building experiences.

4. The campaign promotes loyalty and good will between the company and its employees.

5. The campaign garners strong employee support.

Call to Action

Enlightened companies have found that employee involvement programs offer them a strategic advantage in recruiting and retaining productive employees in today’s competitive job market. Research has confirmed what employees want in such a program.

- They like being involved with charitable and volunteer activities.
- Employees enjoy working for companies that are socially involved in local communities and support charitable activities.
- Workers appreciate payroll deduction campaigns available to support their charitable giving interests.
- They are more likely to have favorable opinions of their employers if the company sponsors and supports employee involvement programs.

As advocates for more effective employee workplace campaigns, the National Advisory Council calls upon companies across America to review this report and thoughtfully consider implementing the recommendations it contains. Three steps are offered to help begin the process.

1. Ensure that your corporate culture is supportive of the workplace campaign and all employee involvement activities.

2. Conduct a thorough assessment of the workplace campaign and identify employee attitudes and perceptions about your current program.

3. Develop specific strategies to support a program that increases employee satisfaction, involvement and participation
This project was initiated by the growing need to provide research, examples and recommendations to increase the value of giving and caring through the employee workplace campaign. The National Advisory Council recruited to guide this effort envisioned two primary goals:

- Promote the importance and value of workplace giving.
- Expand workplace giving by developing models that encourage more employee participation and increase contributions.

The following report is not intended as an exclusive approach to retool the employee workplace campaign. Rather it should be used as an aid to help employers who are struggling with the issues involved in creating a campaign that meets the needs of their organization and their employees.

Workplace Giving – A Valued Tradition

One of the most significant resources American employers offer to address community needs is the opportunity for employees to give to charitable causes at the workplace. Our country has a long tradition of conducting employee workplace giving campaigns to address the social concerns of communities and respond to the charitable interests of employees. This time-honored practice provides nearly $4 billion annually – primarily through payroll deduction. It is the highest yielding and the lowest cost method of fund raising for nonprofit organizations.

Being able to give to charitable organizations through payroll deduction at the workplace is important to employees and has a strong connection to giving. Contributions made by individuals through payroll deduction are estimated to be between four and six times greater than gifts made through other means. Forty-six percent of respondents to the 1999 Independent Sector national survey Giving and Volunteering in the United States reported that being asked to give at work is an important reason for contributing to an organization.

According to the same survey, of those who had the option to give through payroll deduction, 47 percent used it. Of those offered the option of giving through payroll deduction (regardless of whether they used that method), 80 percent reported household contributions. This is in contrast to the 66 percent who contributed but did not have the option of giving through payroll deduction. Of all contributing households, more than 51.3 percent used payroll deduction to give.

The Independent Sector report also states that 76.2 percent of the respondents to its 1999 survey agree that charitable organizations play a major role in making our communities better places to live. That is an increase of nearly five percent since 1994. Nearly 62 percent of the respondents agree that charitable organizations are more effective now in providing services than five years ago. There also has been an increase in the percentage of respondents that agree to the statement that most charities are honest and ethical in their use of donated funds. (See Figure 1.)
A 1998 public opinion poll conducted for United Way of America by Market Facts, Inc. found that 68 percent of the respondents said their company’s support of workplace giving makes them feel good about their employer.

When conducted effectively, workplace giving programs provide numerous benefits. The community and its citizens and employers all benefit from the vital services made available by the revenue contributed through the employee workplace campaign.

For companies, the workplace campaign is an effective tool to enhance its image among key stakeholders. Employees feel a sense of pride in working for an employer that is active in social causes. The community also appreciates corporations that are socially active and supportive of charitable programs.

A strong workplace campaign demonstrates a corporate commitment to supporting employees in their charitable interests and can enhance the company’s other employee involvement programs such as the matching gift and volunteer programs. The campaign provides an opportunity for employees to be involved in a major workplace activity working side-by-side with management in a joint venture.

Employees value the workplace campaign because payroll deduction offers an easy and effective way for them to make significant charitable donations to organizations they want to support. The campaign exposes employees to a wide variety of organizations, many of which can be a resource to them in times of need.

Communities and nonprofit organizations receive significant benefits from the workplace campaign as well. It represents the potential of significant new revenue that is renewable and has the capacity to grow each year. Money raised through the workplace is used to provide critical services in local communities, across the nation and throughout the world. Because of the exposure received through the campaign, many nonprofit organizations have recruited new volunteers as a result of their participation.

The Workplace Environment

Employee charitable campaigns, like many workplace activities, are being shaped by trends in the marketplace as well as factors affecting the way people approach their jobs and link work to their professional and personal interests. Three primary trends stand out.

The employer/employee relationship is evolving. Mergers, downsizing, new economy start-up companies, employee empowerment, professional mobility, and the increasing pressure for financial performance have altered the employer/employee relationship. Employees have a new level of expectation of their employers.

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**Employee involvement activities help integrate personal and professional interests.** There is growing importance placed on employee involvement and partnerships with the company to integrate workers’ personal and professional interests. Team building activities, volunteer opportunities and company-supported athletic and social events are all directed at balancing work and personal life to enhance recruiting and retain the best and most competitive workforce possible. These workplace trends are illustrated in Figure 2.

Within this environment is the workplace campaign, where employees traditionally have been asked to consider their participation and financial support of community needs. It is tempting to dismiss one of the oldest employee involvement activities as being insignificant given the challenges most employers and employees now face. Some discount the value and role of the charitable campaign in today’s workplace setting. Others miss the connection between this extension of employee involvement and its link to being viewed as a preferred employer and exciting place to work.

The findings of this report suggest the employee workplace campaign can be an important part of an employer’s overall relationship with its employees. An effective campaign can send a message to employees about the employer’s social and community commitment, particularly as an integral part of the employer’s broader employee volunteer and community involvement strategy.

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Current State of Workplace Giving

It is estimated that workplace giving provides nearly $4 billion annually to worthy charities. Despite this impressive figure and the benefits of the employee workplace giving campaign, warning signs indicate that the traditional campaign is falling short of its potential to involve employees. Some critics label traditional employee workplace campaigns as tired and uninspired.

Historically, United Ways have been the organizer of workplace campaigns. Nationwide they raised $3.58 billion in their 1998-99 fund-raising campaign, a 5.1 percent increase over the previous campaign season, yet, after inflation, 8 percent less than 1990.

One major shift that has helped offset the loss of employee participation at the workplace has been the increase in leadership giving at the upper income levels. United Way of America reports that United Ways’ percentage of gifts of $1,000 or more has increased from 13 percent in the mid-1990s to more than 25 percent of total campaign revenues today. This is due to the success of local Alexis DeTocqueville Societies and other leadership giving vehicles. Although this trend is a great benefit to workplace fund raising, it does little to address the overall decrease in participation or the need to reinvigorate employee interests and participation at all levels.

Employee participation is in decline. Chief among the warning signs is a decline in the percentage of employee donors at companies that hold campaigns. United Way reports that the number of employees that participate in the annual campaign has decreased from 47 percent in 1988 to 35 percent in 1998. A New York Times article estimated that this loss of employee participation results in about 5 million fewer donors. Fewer donors translate into significantly less money for deserving charities. If participation had remained steady at the 47 percent achieved a decade ago, the workplace campaign would be raising an additional $500 million today, as can be seen in Figure 3.

Figure 3: Estimated Loss of Revenue Based upon Declining Participation

The Consulting Network (TCN) in 1998, giving and/or employee participation had decreased in 60 percent of the 100 companies responding. Nearly 40 percent of those companies that considered their campaign a success reported a decrease in employee participation, none the less.

One major shift that has helped offset the loss of employee participation at the workplace has been the increase in leadership giving at the upper income levels.

Anecdotal information received from surveys and conversations with workplace campaign coordinators suggests that younger workers are less inclined to make a contribution through payroll deduction. These employees are more skeptical of the establishment and are looking for control over where their contributions will be directed. Giving to workplace campaigns is losing ground while total giving by individuals has risen from $84.27 billion in 1991 to $134.84 billion in 1998. Measured in current dollars, it means individual giving has increased by 60 percent.
A smaller percentage of companies are conducting workplace campaigns. In addition to the decrease in the number of employees choosing to participate in the campaign, fewer employees are even given the opportunity to make a contribution. The percentage of companies that conduct workplace campaigns is decreasing. Only about 25 percent of the public say they work in a company with a workplace giving campaign.

Growth in medium and smaller firms. Large employers have a long history of conducting employee workplace campaigns. When these campaigns were producing at record levels, there was not a need to conduct campaigns at smaller companies. Employment growth is now coming from smaller entrepreneurial firms. These firms do not have a history of employee workplace campaigns. By not reaching out to these companies, a significant and growing segment of the employment population is not being given an opportunity to support their favorite charities through the effectiveness of a payroll deduction campaign.

Employers are looking for new ideas. The workplace campaign for many companies has become a routine, if not staid, administrative matter without thought as to how it can be an effective tool to achieve many of the company’s employee and community relations objectives. The 1998 Valuing Employee Involvement survey report revealed that a significant number of companies plan to make changes so their campaigns will be more efficient, effective and vibrant.

These factors and the rapidly changing work environment that favors employee empowerment and involvement, suggest that the traditional campaign may no longer fit every corporate culture. It is time to renew the effectiveness of campaigns and assert new leadership to better meet the needs of employers and employees. Revitalizing the campaign can stimulate employee interest and involvement and increase support to charities that provide services to people in need. Assessment of the workplace campaign is the first step.

Reasons to Assess the Workplace Campaign

In addition to declining employee participation, there are other reasons companies are assessing their employee workplace campaigns. Each group of interested stakeholders has unique reasons to seek changes to the traditional campaign.

The Company

• The company is beginning to examine how corporate philanthropy, including the employee workplace campaign, fits into the overall business strategy.
• The company wants to design a campaign that is cost effective yet generates enthusiasm, involvement and support from employees.
• In today’s work environment, it is important to reduce the perception of negative pressure to give.
• The company wants to give its employees more ownership of a major workplace activity.
• The campaign needs to represent the diverse interests of employees and their families.
• The company wants to improve the level of employee participation.

Employees

• Employees are asking to expand their involvement in workplace issues.
• Employees don’t think the campaign supports issues that are important to them and are asking for a broader range of charitable choices in the workplace campaign.
• People who use the services of or volunteer for an organization want to support it through their workplace campaign. According to the 1999 Independent Sector report, volunteers continue to make larger financial contributions than people who do not volunteer. Households in which one or more family members volunteered gave about 84 percent of all charitable contributions.

• The campaign may be viewed as a management activity with little input from employees or their representative groups.

• Employees feel there is too much negative pressure to contribute at the workplace.

• The campaign offers an opportunity to inform and educate employees about important services provided by the charitable organizations that participate.

The Community

• There are important issues or needs that are not being addressed by agencies currently receiving funding from the employee workplace campaign.

• Essential community services are not being used to capacity or specific populations are not being served due to limited public exposure and support.

• An important source of revenue is being lost through declining participation and a smaller percentage of employers conducting employee workplace campaigns.

Evolution of the Workplace 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. However, the campaign is beginning to evolve from a senior management-directed program into more of an employee-directed activity.

When asked to identify the major issues facing the workplace campaign, companies participating in the Valuing Employee Involvement survey conducted by TCN responded with the following concerns.

• Employee interest and participation in the campaign is declining.

• Younger employees are not as likely to give.

• The campaign has become too time consuming, costly and a burden to the company, especially data entry.

• Senior management does not get involved or support the campaign.

• Employees do not see the relevance or value of supporting the community through an umbrella organization like United Way.

Appendix A gives a list of the major issues companies have identified that are affecting the campaign.

Externally, United Way has announced plans to move away from donor-directed contributions. A March 9, 2000 Chronicle of Philanthropy article notes that United Way estimates that nearly 23 percent, or more than $1 out of every $5, given to United Way was earmarked for charities outside the United Way system. This is compared to 12 percent a decade ago. There is a wide variance in the designation policies of each United Way. While most will process donor directed
gifts, it is not a practice that is encouraged and promoted among employee groups. In fact, many United Way organizations charge an additional fee to process gifts to nonprofit organizations outside of the United Way system.

Internally, employee participation in the workplace campaign is declining. This can be attributed to several factors:

- The growth in the number of new and younger employees who are more skeptical and not as likely to participate in the annual campaign;
- The desire on the part of employee donors to have more control over their charitable contributions; and
- The ineligibility of many worthy nontraditional organizations to receive gifts through the workplace campaign.

Companies are beginning to respond to these factors and are developing new employee workplace campaign strategies. According to the TCN Valuing Employee Involvement report, 83 percent of the 97 companies who conduct a campaign have an employee committee that manages and directs the campaign. About 30 percent of these companies now include federations and organizations other than United Way in their campaigns. Nearly half of the companies who conduct a campaign report that their campaign operates independently of the local United Way designation policies. Companies said responding to employees’ interests is the single most significant factor in expanding the range of charities eligible to participate in their employee workplace campaign.

Figure 4 shows the types of organizations that are now being included in the employee workplace campaign in addition to human service organizations according to the TCN Valuing Employee Involvement report.

Figure 5, on the next page, shows the evolution in the workplace campaign.

**Impact of Technology on the Workplace Campaign**

Companies are beginning to use technology to help manage and implement the workplace campaign. Some companies are using electronic pledge forms, online donation systems, telephone response pledging systems and electronic communications with employees.

Using technology, however, should not replace the personal touch. Passively run campaigns are doomed to failure. Technology can help with transferring funds and pledge systems, but it is important to continue to use volunteers to ask for donations and answer questions.
Technology can be an effective tool in helping to reach new donors. In a 1999 survey conducted for America Online by Roper Starch, 29 percent of the 505 participants said they would be interested in making online donations to charity. Interest among young people was particularly strong—53 percent of the respondents between the ages of 18 and 24 said they were inclined to donate online compared to only 17 percent of respondents over the age of 50.

With the increased presence of the Internet, there are several companies that have developed electronic campaign models and are offering them to charities and directly to companies. These models allow for online contributions, access to information about nonprofit organizations and, in some instances, promotion of volunteer opportunities. These modules can be personalized and branded to look and feel like the company’s own Web site. Purchasing one of these packages or allowing the federation to provide it can significantly reduce the entry costs into an electronic pledging system.

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<thead>
<tr>
<th>Feature</th>
<th>Up to Now</th>
<th>Today and Beyond</th>
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<tbody>
<tr>
<td>Type of Campaign</td>
<td>• United Way brand</td>
<td>• Company branded</td>
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<tr>
<td>Ownership of the Campaign</td>
<td>• Senior management</td>
<td>• Employee ownership</td>
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<td></td>
<td>• Top down approach</td>
<td>• Employee directed</td>
</tr>
<tr>
<td>Choice Options</td>
<td>• Member agencies</td>
<td>• Any 501(c)(3)</td>
</tr>
<tr>
<td></td>
<td>• Fields of Service</td>
<td>• Organizations beyond United Way are involved as campaign participants</td>
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<tr>
<td></td>
<td>• Health and human service organizations</td>
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<tr>
<td></td>
<td>• Primarily designations are the first dollars towards an agency’s allocation</td>
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</tr>
<tr>
<td>Marketing of Recipient Agencies</td>
<td>• Promotion of community review process</td>
<td>• Employees decide how to direct their contributions</td>
</tr>
<tr>
<td></td>
<td>• Brochures, agency fairs</td>
<td>• Brochures, agency fairs, Internet and intranet</td>
</tr>
<tr>
<td>Technology</td>
<td>• Limited technology</td>
<td>• Technology used to market and administer the campaign</td>
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<td></td>
<td></td>
<td>Pledge systems</td>
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<td></td>
<td>• Scanning</td>
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<td>Marketing the campaign</td>
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<td>• Web sites</td>
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<td></td>
<td>• Online videos</td>
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<td>• E-mail</td>
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</table>

Figure 5: Evolution of the Workplace Giving Campaign
Emerging Campaign Models

Given today’s environment, companies and employees are looking to design a workplace campaign that:

- Serves the interests of the company and its employees.
- Fits with employee involvement goals and encourages employee participation.
- Is efficient to administer at minimal cost.
- Offers more choices.
- Reduces negative pressure to give.

Several national companies are beginning to identify different models for the employee workplace campaign and have made significant changes to their internal campaigns. These changes have resulted in an increase in employee participation and total contributions.

Sears – A Company Branded Campaign

Faced with stagnant performance and negative perceptions of the annual campaign, Sears undertook an assessment of its employee workplace campaign. As a result of employee input and benchmarking of other successful campaigns, Sears redesigned its campaign. Branded with a new name and logo, the campaign now encourages more associate ownership and involvement and offers a wider range of charitable organizations. A survey of associates indicated they were interested in supporting health, human-service and environmental nonprofit organizations. Sears identified local and national organizations serving these three primary issues.

Figure 6 shows the nonprofit organizations eligible to participate in the Sears You Can Make a Difference employee workplace campaign.

<table>
<thead>
<tr>
<th>Local Partners</th>
<th>National Partners</th>
<th>Sears Initiatives</th>
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<tbody>
<tr>
<td>American Cancer Society</td>
<td>America’s Charities</td>
<td>American Red Cross</td>
</tr>
<tr>
<td>American Heart Association</td>
<td>Community Health Charities</td>
<td>Coats for Kids</td>
</tr>
<tr>
<td>United Way</td>
<td>Earth Share</td>
<td>Gilda’s Club</td>
</tr>
<tr>
<td>Local health agencies</td>
<td>International Service Agencies</td>
<td>Sears Roebuck Foundation</td>
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<tr>
<td>Local environmental agencies</td>
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Figure 6: Sears Nonprofit Campaign Partners

Under this company-branded model, the company assumes ownership and control of the campaign and personalizes it to fit corporate and employee interests. This model generally includes groups in addition to United Way and often supports contributions to company-sponsored initiatives.

The outcomes of the company-branded employee workplace campaign have been positive. Associates like having more charitable choices and have expressed positive feelings about the campaign. According to campaign volunteers, about 98 percent of associates give the campaign a favorable rating (see Figure 7). Giving has increased 29 percent since the new campaign was introduced in 1995.

Figure 7: Associate Satisfaction with the Campaign
Sears Senior Vice President of Public Relations and Government Affairs, Ron Culp, is enthusiastic about the new campaign, “Sears implemented many of the recommendations in this report and our associates have responded. They like having more control over their giving through a companywide campaign that is uniquely Sears. ‘You Can Make a Difference’ is more than a campaign slogan. It is a message that rallies and links our employees to a common goal of caring.”

City of Houston – Combined Municipal Campaign

Before 1991, United Way of the Texas Gulf Coast coordinated the City of Houston’s employee workplace campaign. Although the campaign allowed city employees to help those less fortunate, employees expressed the need for greater choice. In 1991, the campaign was expanded to include organizations in addition to United Way, and the name was changed to the Combined Municipal Campaign (CMC). During the first years of CMC, various city employees were given the challenge of administering the campaign. There was no central governing unit. In 1995, responsibility for the campaign was given to the human resources department.

Today, CMC is one of the fastest growing public sector campaigns in the country. Participation has increased from about 25 percent in 1994 to 38 percent in 1999, while contributions have increased 239 percent, from $194,166 to $663,900 (see Figure 8). An environment that values generosity and recognizes employees’ giving and caring was cited as a major factor in the campaign’s growth.

Houston’s Mayor Lee P. Brown summarized the campaign’s success, “By giving employees more options to determine where their charitable contributions go, they are more likely to feel like an important part of the process and are more willing to participate.”

The campaign implemented several effective campaign techniques including leadership giving, incentives, events, education and a recognition and thank-you program.

Mayor Lee P. Brown summarized the campaigns success, “By giving employees more options to determine where their charitable contributions go, they are more likely to feel like an important part of the process and are more willing to participate.”
Pitney Bowes – Combined Campaign Model

Understanding the value of the campaign to its employees, Pitney Bowes conducted an assessment of its program. The goal was to enhance employee participation in Pitney Bowes philanthropic endeavors as well as strengthen relations with employees. Annual employee surveys indicated employees would like to have additional charities participate in the campaign. A change in the top leadership of the company occurred in 1996 and while the new CEO favored greater choice, he also wanted to demonstrate his appreciation for Pitney Bowes employees. The result was a redesigned campaign that included four additional federations of nonprofit organizations and the Pitney Bowes Employee Relief Fund. The additional federations included America’s Charities, Community Health Charities, Earth Share and International Service Agencies. Pitney Bowes agreed to a 50 percent match of the funds raised by employees. The result was $300,000 new dollars raised in the first year of the Pitney Bowes Employees’ Giving Campaign—a 7 percent increase in total contributions, as well as an increase in participation.

"At Pitney Bowes we give ownership of the campaign to our employees," states Rich Palladino, corporate director of employee giving and volunteerism at Pitney Bowes. "Once we asked them what they wanted in a workplace giving program and they responded, it was obvious what we needed to do."

According to the TCN Valuing Employee Involvement report, giving and employee participation increase when organizations in addition to United Way are included in the campaign. Employee participation increased in 76 percent of the companies that offered a broader range of giving options, and total contributions increased in more than 90 percent of the companies that offered additional nonprofit organizations in their campaign.

Dell Computers – Integrated Campaign

The employee workplace campaign is a key component of the corporate philanthropy program at Dell Computers. In fact, executive and employee giving represent the fastest growing segment of giving at Dell.

The campaign at Dell had become a routine administrative function without much thought as to the full potential it represented. Dell integrated the campaign, corporate giving, matching gifts and employee volunteerism into a companywide program. Responding to employee interests, Dell assessed its employee workplace campaign and expanded it to include other nonprofit organizations such as America’s Charities, Earth Share and International Service Agencies. The result was phenomenal: participation increased, the number of leadership givers increased and the number of employees engaging in volunteer activities increased. In three years, employee participation at Dell increased from 10 percent to 45 percent. Total giving jumped from $220,000 to $2.7 million.

Michele Glaze, Manager of the Dell Foundation says: “At Dell we developed a campaign that got our employees excited. Should it be about how much money we can raise from our employees or is it about getting employees to feel good about causes that matter in their lives?”
Giving to all nonprofit organizations, including United Way, went up after the new campaign model was introduced. The campaign has energized Dell and served to build a spirit of camaraderie between the company and its employees.

**Michele Glaze, Manager of the Dell Foundation says:**
“At Dell we developed a campaign that got our employees excited. Should it be about how much money we can raise from our employees or is it about getting employees to feel good about causes that matter in their lives?”

**Recommendations – Building a Campaign for the New Century**

There are numerous ways to seek charitable contributions, but the employee workplace campaign with payroll deduction remains one of the most effective ways to reach large numbers of people. The workplace campaign also is one of the most efficient and effective ways to provide financial resources to a wide array of deserving nonprofit organizations that match employee and company interests.

Through the work of the National Advisory Council, several key components of the employee workplace campaign of the new century have been identified. The campaign may look different from what we have grown to expect. Employees will have a greater role in designing and managing the campaign, and technology will play a key role in administering the campaign and educating employees.

The first step in building an employee workplace campaign for the new century is to overcome the perception that the campaign is a burden. Companies increasingly are becoming concerned with the time, cost and resources required to conduct an effective campaign. These companies are missing the tangible benefits that accrue from the employee workplace campaign and have not fully explored the partnership that can exist with the nonprofit organizations that participate in the campaign.

Companies that already have assessed their campaign and have made changes are doing so primarily because employees are asking for change. They have discovered that the campaign is an effective tool for empowering employees and engaging them in an important workplace activity.

A 1999 study conducted by Cone/Roper found that 87 percent of employees of companies involved with a cause feel a strong sense of loyalty to their company versus 67 percent of employees at companies without cause programs. In today’s competitive marketplace, the pressure of recruiting and retaining talented workers is extremely important. Perhaps the workplace campaign can be an increasingly significant factor in building an engaged and vital employee base.

Technology also can play a central role in helping to reduce the burden of conducting a campaign. Scan cards and other technological advances are being introduced to support the campaign, eliminating the need for data entry of payroll pledge information.

Nonprofit organizations that participate in the campaign are aware of practices and techniques that can be implemented to help reduce the cost and time required by the company to conduct an effective employee workplace campaign with payroll deduction. There is value in involving them in the campaign design and implementation process.

We recommend that the campaign of the new century begin with an assessment of the current employee workplace campaign and a discussion of the value the company and its employees place on this time-honored practice.
Assess the Current Campaign

Given the current trends in employee workplace campaigns, the National Advisory Council recommends that companies begin by undertaking an assessment of their current campaign. Assessing the campaign is not a complicated process. However, like any process that may result in change, a number of issues deserve careful consideration. The benefits that can be realized from a revitalized employee workplace campaign are worth the investment of time and money.

Most campaign assessments begin by:

- clarifying the company’s employee and community relations goals;
- reviewing campaign performance; and
- identifying employee attitudes and perceptions, usually through a survey.

Many companies are beginning to combine all of their employee involvement programs into a single package. This includes matching gifts, volunteer programs and the employee workplace campaign.

Based on the findings, new strategies can be developed to revitalize the campaign. See Appendix B for a complete guide on how to assess a company’s workplace giving campaign. Appendix C includes a sample employee survey that can be used to identify perceptions and attitudes about the annual workplace campaign.

Make the Case for a Campaign

While workplace giving is a time-honored tradition with significant benefits, for many it has become nothing more than a routine administrative matter. To consider it merely as routine deprives the company of one of its most effective employee relations tools. The campaign provides an opportunity to build stronger relations with employees and to engage them in a major workplace activity. It demonstrates corporate support for the charitable interests of its employees, encourages teamwork and allows employees to assume ownership of a visible and important event.

Satisfaction with the employee workplace campaign with payroll deduction is quite high. According to the 1999 Independent Sector survey on giving and volunteering, among companies with such a plan, 89 percent of employees want to continue it, while only 6 percent wish to discontinue it. As noted previously, being able to give through payroll deduction has a strong connection to giving. Forty-six percent of respondents to the Independent Sector survey reported that being asked to give at work is an important reason for contributing to an organization.

Integrate the Campaign with Employee Involvement Objectives

Many companies are beginning to combine all of their employee involvement programs into a single package. This includes matching gifts, volunteer programs and the employee workplace campaign.

The Independent Sector survey revealed that the workplace plays an important role in informing people about volunteering. Of the 56 percent of respondents volunteering in 1998, 24 percent learned about volunteering through their employer or workplace, second behind their place of worship. The connection between volunteering and giving is clear. Volunteers continue to make larger financial contributions, on average, than people who do not volunteer. Contributing households with a volunteer gave an average of more than two and one-half times more than contributing households without a volunteer.
Linking the campaign with other employee involvement activities is valuable. Integration serves to strengthen the campaign. Key factors in successfully integrating the campaign have been identified.

- Brand all employee involvement programs with a common name.
- Provide oversight by an employee committee.
- Include the workplace campaign in all promotional brochures and marketing activities for volunteer programs.
- Position the campaign as part of the overall community relations and employee involvement strategies.
- Offer to match donations made through the workplace campaign.

**Linking the campaign with other employee involvement activities is valuable. Integration serves to strengthen the campaign.**

**Incorporate Technology**

Perhaps no other tool has the potential to revolutionize the employee workplace campaign like emerging technology. Technology seems to be key in helping companies make the campaign more efficient and cost effective. The 1998 TCN Valuing Employee Involvement survey results found that nearly 40 percent of the respondents said they were looking at how technology could help in the administration of the campaign and processing employee pledge information.

However, whether new technology is positive or negative depends largely on how it is used. Companies that have replaced active campaigns based upon effective fund-raising practices with a more passive approach utilizing only technology as a pledging mechanism have been disappointed in the results. In most cases, total giving has declined due primarily to a loss in employee participation.

Internet technology offers several major opportunities for the workplace campaign.

1. **Reach new donors.**

   The Internet gives charities the ability to access more people than organizations have historically been able to reach. In a survey conducted for America Online by Roper Starch, 29 percent of the 505 participants said they would be interested in making online donations to charity. Interest among young people was particularly strong – 53 percent of the respondents between the ages of 18 and 24 said they were inclined to donate online compared to only 17 percent of respondents over the age of 50. Research indicates that younger donors are not participating in the traditional employee workplace campaign. The Internet or online giving may help to connect with a portion of the workforce that currently is not being reached. The increasing availability of the Internet will continue to make it a valuable resource. A recent survey found that as of May 1999, 37 percent of the total U.S. population has Internet access, up from only 7 percent in 1995. Near 50 percent of the adult population has online access at home and 35 percent say they have online access at work.

2. **Provide information to employees.**

   The Internet provides the opportunity for individuals to learn more about a charity. Most people visit a charity’s Web site seeking information. According to a survey conducted by Craver,
Matthews, Smith & Company, a marketing and fund-raising firm, among the most important features of a charity’s Web site are:

- an explanation of how contributions are spent;
- a statement about the confidentiality of the information that donors share with the charity; and
- the option to make a donation online.

Corporate intranets with links to charity Web sites can be a valuable and effective resource to inform employees. Information that cannot be contained in a brochure can be placed easily on a Web site.

3. Support the administration of the campaign.

Technology can help companies reduce the cost of conducting the employee workplace campaign by automating pledge-processing functions. Some companies have outsourced this task either to one of the nonprofit organizations that participates in the campaign or to a neutral pledge processing organization.

To date, companies have experimented with using technology to help capture pledge information and input the necessary data into the payroll system so that deductions may be made throughout the year. Technology has reduced the need for manual data entry, which can be costly and is subject to a higher error rate. Several electronic pledging systems have been introduced including telephone response systems, scanable pledge forms and online donation systems.

While this technology can reduce costs and support the campaign, it should not replace the personal touch. Passively run campaigns are doomed to failure. Technology can help with transferring funds and pledge systems, but it is important to continue to use volunteers to ask for donations and to answer questions. The number one motivation for people to give to a charity is because someone they knew personally asked them.

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The National Advisory Council knows that technology, when used strategically and combined with proven practices, can have a positive impact on giving. With the increased presence of the Internet and corporate intranets, there are numerous opportunities to use technology to support and enhance the employee workplace campaign. According to a recent article in *USA TODAY*, more companies are using their internal computer network to deliver information to employees. In a survey of 757 employers by the Society for Human Resource Management, more than 85 percent said their intranet is useful for disseminating information, and 59 percent of employers said they were using their intranet to improve service to employees. The same survey stated that 28 percent of the companies said the intranet was a tool to help reduce costs. Based on these findings, the use of technology in the administration of the employee workplace campaign and to educate employee donors should be encouraged.

Several service companies have developed software packages to help corporations and nonprofit organizations take advantage of emerging technology to support the employee workplace cam-
campaign. Some of these follow a business-to-business model, where they market themselves primarily to nonprofit organizations as a resource the nonprofit can provide to companies. Another model is the business-to-consumer model, where the target audience is the potential donor. Examples of these models are:

- **DonorNet** uses the business-to-business model and markets itself to the nonprofit sector. Using the services of DonorNet, companies can develop a personalized employee workplace campaign complete with charity listings, information on each participating charity and the option to make a payroll deduction, credit card or checking/debit donation. DonorNet captures the relevant details about the donor, authorizes the transaction and handles the reporting for the company. DonorNet partners with America’s Charities to provide campaign planning, pledge processing and fund distribution to designated charities.

- **Charitableway.com** uses both a business-to-business and business-to-consumer model. It offers a public site open to anyone with Internet access. The public site contains information on more than 3,000 charitable organizations. Potential donors may obtain more information about those charities and choose to make an online donation. Charitableway.com also is marketing a business-to-business package to help companies administer their annual workplace giving and matching gift programs. In the business-to-business model, Web sites can be personalized for each company using only those charities the company wishes to include in its campaign.

- **J-K Group** is a for-profit company whose core business is managing matching gift programs for corporations. Three years ago, the company began handling fiscal services for the employee workplace campaign. While not totally a web-based fund-raising program, it does offer online donation services and also will support paper pledge forms.

These are just three companies that provide workplace campaign processing and fiscal services to corporations. Companies should thoroughly investigate a potential vendor prior to selecting one to help with the administration of the campaign. Some key factors that should be considered in selecting a potential vendor include determining if the vendor has a well-developed business plan, what their level of experience is in campaign administration, whether they have other corporate clients and what costs are associated with their services.

**Build the Campaign On Best Practices**

Through research, eight campaign practices have been identified that encourage participation in the employee workplace campaign.

1. **Assume ownership and brand the campaign.**

   Companies should be encouraged to assume ownership of the campaign by branding it to fit their unique corporate culture and to ensure it is responsive to employee interests. Many companies have found it effective to change the name of the campaign from the generic United Way campaign to a name that reflects the company’s values such as the Sears You Can Make a Difference Campaign, Prudential Cares, or the Pitney Bowes Employees’ Giving Campaign. See Figure 9. The name change becomes a key part of the branding process to reflect corporate ownership and to promote loyalty among employees.
Branding the campaign also involves adding charitable organizations that support the corporation's community relations goals and the charitable interests of employees. Some companies have included their own signature corporate programs as a partner in the campaign. This is another opportunity to build synergy between the company, its philanthropic goals and employees' interests.

Research shows employees feel good about their company for getting involved in social causes and issues. In fact, nearly 68 percent of employees feel good about their employer for its support of the employee workplace campaign.

2. **Provide leadership to the campaign.**

Leadership support for the campaign is essential. One volunteer noted, "If you lose leadership, the campaign becomes routine and mundane." Most of the research on effective campaigns highlights the need for a corporate culture that supports the campaign and has the involvement of senior officers. Some examples of how companies can provide leadership include:

- Encourage the visible and active involvement of senior company officers in the campaign.
- Obtain middle management support that allows company time for campaign training, employee meetings and educational activities.
- Provide a letter to employees from the CEO or a senior manager urging support of the campaign.
- Involve representatives from organized labor, if appropriate, to endorse and support the campaign.
- Sponsor a companywide leadership giving program for employees at all levels.
- Offer to match employee contributions made through the employee workplace campaign.

United Way of America has documented that the per capita gift increases when a company appoints a senior executive as the national chair to oversee the campaign in all locations and when they conduct separate briefings for top executives to encourage their support and visible leadership.

Leadership should never taint the giving spirit of a campaign by pressuring employees to participate. Company officers can set the tone for a campaign by their personal involvement. The goal is to create an atmosphere of productive fun, provide information about the services supported by the charities and offer employees the opportunity to make an informed giving decision. Informed decisions are not pressured decisions.

**Companies that have successfully revitalized their campaign have taken the time to assess their performance by looking at trends in employee participation and total dollars raised.**

3. **Review and assess current campaign performance and practices.**

Companies that have successfully revitalized their campaign have taken the time to assess their performance by looking at trends in employee participation and total dollars raised. With this knowledge, strategies can be developed to reverse declining trends.

It also is important to develop a process for obtaining continual feedback from employees. Their perceptions of the campaign greatly influence their desire to participate. According to
the TCN Valuing Employee Involvement report, a survey of employees may affect employee participation and total giving. Of the companies that surveyed employees, total giving increased in 94 percent and employee participation increased in 68 percent.

In addition to this one-time assessment, an annual evaluation should follow each campaign. An employee survey and meeting with campaign volunteers can help to determine the strengths and weaknesses of the most current campaign and can be a key factor in planning for the next year.

**Of the companies that surveyed employees, total giving increased in 94 percent and employee participation increased in 68 percent.**

4. **Allow for employee ownership and involvement.**

The campaign can be an effective tool to energize employees in an important workplace activity. Most companies are identifying opportunities to involve employees in a meaningful way. Examples include:

- Form an employee steering committee to develop and oversee the campaign plan and strategies. Involve representatives from various employee groups, including organized labor, to serve on the committee.
- Encourage people to volunteer as members of the committee or as representatives in their individual departments. Sears started this practice a few years ago and now about 60 percent of the campaign committee/representatives are true volunteers and not appointed.
- Utilize experienced volunteers to provide training for newer campaign volunteers.
- Highlight the involvement of volunteers throughout the campaign.
- Provide recognition for campaign volunteers.
- Thank volunteers for their time and efforts.
- Conduct employee surveys and focus groups following each campaign to obtain input and feedback.

5. **Build a strong educational component into the campaign.**

In a recent survey for a professional services firm, about 40 percent of the employees indicated that having more information about the charitable organizations would encourage them to make a contribution. It is important for employees to understand where their money is going and to know that the recipient agency will make wise use of their funds.

Some companies are developing intranet sites to support the campaign. These often contain links to the charity Web sites, giving employees additional sources of information.

With modern technology, it is important to use a variety of communication resources to reach employees and to market the campaign. These may include Internet, intranet, e-mail, voice mail, newsletters, posters and brochures.

Provide other opportunities for employees to get information about the campaign or about the services offered by the nonprofit organizations participating in the campaign. This can be done through agency fairs, department meetings, brown bag seminars and informational brochures.

The 1999 Independent Sector survey identified some trust issues regarding charitable organizations. Nearly 30 percent of respondents indicated they don’t believe charities are honest.
and ethical in their use of donated funds. Employee education and donor acknowledgements help to build a relationship between the donor and the designated charities and helps to portray the impact of the contribution.

1998 United Way of America research shows that the per capita gift increases from $96 to $122 when the company includes a strong educational component in the campaign.

6. Retain personal connection as much as possible.

Technology is commonly used to support the employee workplace campaign. Companies are using e-mail and telephone response systems to collect employee contribution information. While these are effective tools, companies that have relied solely on technology to involve employees and ask for a donation have been disappointed in the results.

According to the 1999 Independent Sector report, the primary motivation for giving was being asked by someone the employee knew well. The same is true with the workplace campaign. People give to people. Technology can support a campaign but should not be used to replace a personal request for participation from someone the employee knows well, which is a primary motivator of giving.

The National Advisory Council suggests the best use of technology is in the administration and marketing of the campaign, not in the solicitation phase. Technology can be used to reduce administrative costs, such as eliminating the need for data entry, but needs to be weighed against the impact it can have on giving.

The National Advisory Council suggests the best use of technology is in the administration and marketing of the campaign, not in the solicitation phase.

7. Track and monitor results throughout the campaign.

According to United Way of America, the per capita gift increases in companies where goals are set and results are tracked by site and along organizational lines.

Not all employees are expected to participate in the campaign. Monitoring activity will ensure that each employee has been given the opportunity to make an informed decision. Tracking and communicating the results allows identification of departments or locations where giving has decreased or employees have not been given the opportunity to make a decision.

Communicate regularly with volunteers throughout the campaign so they know the progress in their respective departments or locations. They cannot encourage participation if they are not aware of what is happening.

8. Implement an internal recognition and thank you program.

Thanking donors is important because individuals who are thanked are significantly more likely to be favorable to the workplace campaign than are donors who are not thanked, according to a December 1998 national public opinion poll conducted for United Way of America by Market Facts, Inc. Thanking the donor seems to decrease the donor’s perception of pressure to contribute.
Respondents to the same survey also were asked whether incentives affected their giving. The majority (60 percent) said that no incentives were offered; 16 percent said incentives were offered to everyone who turned in a pledge card; another 16 percent said incentives were offered only to people who made a contribution. The perception of pressure to give is lower among those who said no incentives were offered. Use of incentives does appear to have some positive affect on giving among those who were offered an incentive if they turned in a pledge card, regardless of whether they made a contribution.

Create a Partnership Between the Company and Nonprofits

The nonprofit organizations selected to participate in the workplace campaign should be more than passive recipients of charitable donations. These organizations want to add value to the relationship by being a resource to both the company and its employees. In addition to nonprofit organizations’ experience in implementing workplace giving programs, they can provide information on research and trends, help companies promote environmentally conscious programs, assist with relief and disaster programs and organize international giving programs.

The National Advisory Council concludes that current trends can be reversed so the employee workplace campaign can achieve its true potential. To do so, will require that companies adopt a culture that recognizes the value of employee involvement and is supportive of a strong workplace giving program. Some recommendations are included in Figure 10.

<table>
<thead>
<tr>
<th>Recommendations for Revitalization</th>
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<tbody>
<tr>
<td>• Brand the campaign and integrate it with other employee involvement activities.</td>
</tr>
<tr>
<td>• Make the campaign user friendly and responsive to corporate and employee interests.</td>
</tr>
<tr>
<td>• Engage employees in the ownership, design and implementation.</td>
</tr>
<tr>
<td>• Evaluate employee perceptions and attitudes about charitable giving and the campaign.</td>
</tr>
<tr>
<td>• Offer a portfolio of charitable organizations that give employees a range of choice in directing their charitable giving to causes of interest to them.</td>
</tr>
<tr>
<td>• Incorporate an education component and use a variety of methods to communicate with employees, including the Internet and intranet.</td>
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<tr>
<td>• Promote, encourage and reinforce the value of volunteerism.</td>
</tr>
<tr>
<td>• Create a partnership between the company and the participating nonprofit organizations, and link employees with charitable agencies.</td>
</tr>
<tr>
<td>• Adapt technology to educate employees and to market and administer the campaign.</td>
</tr>
<tr>
<td>• Use a variety of solicitation methods; yet maintain emphasis on personal solicitation.</td>
</tr>
<tr>
<td>• Celebrate the difference employees make through workplace involvement.</td>
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</table>

Figure 10: Recommendations for Revitalization

Additional information on best practices and effective workplace campaigns can be found in Appendices D and E. Appendix D lists the characteristics of an effective workplace campaign as identified through research and benchmark activities conducted by TCN. Appendix E answers some of the more frequently asked questions about revitalizing the employee workplace campaign.
New Measures of Success

The total amount of dollars raised, percent of employee participation and the average gift per contributor are becoming secondary performance measures in the new employee workplace campaign. The campaign of the new century emphasizes indicators that are equally, if not more, important in determining the success of the employee workplace campaign.

One corporate executive remarked that his company conducts a workplace campaign primarily to support its employees and their interests. Of secondary importance is how much money can be raised for charity. He noted this is a shift from recent years when the emphasis clearly was on raising money for charity.

This report identifies five key indicators companies are using to determine the success of their campaign.

1. The campaign is integrated with the company’s employee involvement program.

2. The campaign is branded to fit the company’s unique culture and includes organizations that are relevant to employees and their charitable and volunteer interests.

3. The campaign provides opportunities for employee involvement and team building experiences.

4. The campaign promotes loyalty and good will between the company and its employees.

5. The campaign garners strong employee support.

The total amount of dollars raised, percent of employee participation and the average gift per contributor are becoming secondary performance measures in the new employee workplace campaign.

Call to Action

Enlightened companies have found that employee involvement programs offer them a strategic advantage in recruiting and retaining productive employees in today’s competitive job market. Research has confirmed what employees want in such a program.

• They like being involved with charitable and volunteer activities.

• Employees enjoy working for companies that are socially involved in local communities and support charitable activities.

• Workers want payroll deduction campaigns available to support their charitable giving interests.

• They are more likely to have favorable opinions of their employers if the company sponsors and supports employee involvement programs.
As advocates for more effective employee workplace campaigns, the National Advisory Council calls upon companies across America to review this report and thoughtfully consider implementing the recommendations it contains. Three steps are offered to help begin the process.

1. Ensure that your corporate culture is supportive of the workplace campaign and all employee involvement activities.

2. Conduct a thorough assessment of the employee workplace campaign and identify employee attitudes and perceptions about your current program.

3. Develop specific strategies to support a program that increases employee satisfaction, involvement and participation.
Appendices

Appendix A
Issues Affecting the Campaign

1. Declining Employee Participation
The percentage of employees who choose to make a contribution through the annual workplace campaign has steadily declined in the last decade. This drop in participation can be attributed to several factors.

- Employees may not see the campaign as relevant to their charitable/volunteer interests.
- The campaign does not support charitable organizations that are important to the employees.
- Younger donors are less inclined to make a contribution.
- The campaign has lost the personal solicitation approach to each employee.
- Employees don't understand how their contribution is making a difference.
- The campaign is viewed as a management activity with little input from employees.

Strategies for Reversing the Decline in Participation
Consider including additional charitable organizations to the list of campaign participants. Research consistently has shown that employees would like more organizations to be eligible to participate in the annual campaign. Giving and participation increase when the campaign is opened to organizations in addition to United Way. Adding other nonprofit groups helps employees feel the campaign is relevant to them by giving them an opportunity to use payroll deduction to support groups that they are involved with either as volunteers or as contributors outside of the company.

Younger donors are more skeptical of charities and are asking for the ability to direct their contributions to the agencies of their choice. In cases where the employee has not made a decision about which agency to choose, they are seeking information about the charity and its use of donated funds. Younger donors want assurance that their gifts will reach the intended charities and are making a real difference.

A strong educational component will help employees make a decision about giving. 1998 United Way of America research has documented that the per capita gift increases from $96 to $122 when employees receive factual information as part of the campaign.

Respondents to the 1999 Independent Sector survey on giving and volunteering were asked what they thought were important motivations for contributing. The following were the most frequently cited.

- Being personally asked to give by someone they knew well.
- Having volunteered at the organization.
- Being asked by clergy to give.
- Reading or hearing a news story.
- Being asked at work.

Several major reasons were cited by noncontributors for not giving.

- They could not afford to give.
- They were making less money this year than last year.
- They would rather spend their money in other ways.
- They were unsure about having a job next year.
2. Declining Company Resources to Support the Campaign

Many companies believe the campaign has become too time consuming and requires too much effort to conduct each year. In some cases this is true because of corporate downsizing and reduced resources. It is easy to lose sight of the benefits of a campaign simply because it has been done for so long.

Companies are assessing the campaign to identify opportunities to reduce the administrative burden of the campaign and to respond to employee interests. Technology can be used to help administer the campaign and reduce the cost.

The nonprofit organizations that participate bring a wealth of resources to assist in the administration of the campaign. If additional costs are incurred, many of them can be recovered through models that have been developed in recent years by nonprofit organizations. Materials and pledge processing can be provided for as low as 1 to 4 percent of the campaign revenue.

The benefits to the company of a workplace campaign far outweigh the burdens. The campaign is an effective tool for empowering employees and engaging them in an important workplace activity. It builds loyalty between the company and its employees. In today’s highly competitive marketplace, the pressure of recruiting and retaining workers is extremely important. Some companies are finding that their employee involvement programs, including the workplace campaign, are tools to recruit and retain qualified and motivated employees.

3. Encouraging Senior Management to Get Involved

Providing a corporate culture that is supportive of a workplace campaign is one of the most important factors influencing giving. Nothing demonstrates a supportive culture like the visible involvement of senior officers. In 1998, United Way of America conducted research that shows the per capita gift increases significantly when a senior executive is appointed as a national chair of the campaign and when separate briefings are held with top executives to encourage their support and visible leadership.

Volunteers are likely to do a better job if they believe the company is behind them and is willing to give them the time they need to conduct the campaign in their department and/or location.

4. Simplifying the Administration of the Campaign

Technology is a valuable resource to assist companies with the administration of their workplace campaign. Many companies now use automated pledge systems such as voice response, online donations and scan pledge forms. All of these systems eliminate manual entry of pledge information into the payroll system. If used with a strong education component and personal contact, they can help to increase giving by reaching new donors.

Technology is also an effective tool for educating employees and, in some instances, can reduce the amount of paper distributed. Use technology such as intranet sites, voice mail and e-mail to communicate with employees and provide them with information about the organizations eligible to participate in the campaign.

Companies such as Sears and USA TODAY are finding that working with a fund-raising federation that offers a pre-approved listing of charities with a four-digit code helps in the administration of the campaign. These agencies meet the federation’s highest ethical standards and do not require verification of their 501(c)(3) status. Use of codes reduces the time spent processing contributions and thus reduces the cost and burden of administering the campaign.
5. Recruiting Volunteers to Help with the Campaign

Some companies have difficulty in recruiting employees to serve as campaign volunteers. This may be due to a corporate culture that is not supportive of the campaign, a feeling that middle management does not encourage involvement, a genuine lack of time or being appointed to the campaign without being consulted.

It is difficult to assess whether employees have the time to be involved, but we do know that if management is supportive and encourages involvement, employees are more likely to volunteer.

Sears asks employees to volunteer rather than having them appointed by management. Today, nearly 60 percent of the Sears campaign workers have volunteered to serve, and more than 50 percent say they would volunteer again next year.
Appendix B

Campaign Assessment Tools

Assessing the workplace giving campaign is not a complicated process. Like any change in policy, it deserves careful consideration of a number of issues. The following sequence supports the thoughtful planning that goes into making a change in the employee workplace campaign. The benefits that can be realized from a revitalized campaign are worth the investment of time and money.

First: Determine Company Goals and Issues

- Determine whether there are business, management or corporate cultural changes that justify the need to consider changing the workplace campaign.
- Explore the major issues that affect the company and its employees.
- Examine the company’s employee relations goals.
- Determine the company’s community relations objectives.
- Clarify the company’s goals for conducting an employee workplace campaign.

Second: Identify Opportunities for Improvement

- Measure/survey employee attitudes about the existing workplace campaign and their interest in making modifications.
- Measure the financial performance of the company’s current workplace campaign (level of participation, total dollars raised, turnover in givers, etc.).
- Identify key issues and areas for improvement in the campaign.
- Evaluate successful practices of other comparable companies and employee campaigns.

Third: Determine Strategy and Key Implications

- Based on findings, determine the most effective approach to changing the employee workplace campaign.
- Determine benefits to the company, employees and charitable organizations.
- Assess how the workplace campaign will affect or relate to other company contributions, employee involvement and community relations activities.
- Determine changes, if any, that need to be made in the administrative or operational support of the campaign.

Fourth: Design a Program That Achieves the Following

- Serves the best interests of the company and its employees.
- Is attractive to employees.
- Reduces the perception of pressure to contribute.
- Is efficient to administer at minimal cost to the company.
- Builds a partnership among the company, its employees and the nonprofit organizations participating in the workplace campaign.

Fifth: Prepare Recommendations and Operating Plan

- Develop plan, operating policies and implementation time line.
- Present recommendations to management.
<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
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<tbody>
<tr>
<td>1. Name of Company</td>
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<td>2. Total Number of Employees</td>
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<td>At headquarters</td>
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<td>At operating units</td>
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<td>3. Number of Operating Units</td>
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<td>4. Key Business, Social or Workforce Issues Affecting the Company</td>
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<td>5. Community/Philanthropic Issues of Interest to the Company</td>
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<td>6. Does the company have a matching gift program?</td>
<td>Yes</td>
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<td>No</td>
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<td>7. Does the company match employee gifts to the campaign?</td>
<td>Yes</td>
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<td>No</td>
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<td>If yes, what are the parameters of the match?</td>
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<td>Is the corporate gift tied in any way to employee giving?</td>
<td>Yes</td>
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<td></td>
<td>No</td>
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<td>8. Does the company set a campaign administration budget?</td>
<td>Yes</td>
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<td>No</td>
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<td>If yes, how much is the annual budget?</td>
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<td>Is this amount included in the corporate contribution to the campaign?</td>
<td>Yes</td>
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<td>No</td>
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<td>9. What are the objectives of the workplace campaign?</td>
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<tr>
<td>10. Have you surveyed employees to identify their perceptions and attitudes about the workplace giving campaign?</td>
<td>Yes</td>
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<td>No</td>
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<td>If yes, what were the findings?</td>
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<td>11. Is the campaign organized on a companywide basis or does each operating unit take responsibility for its own campaign?</td>
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</table>
12. Which organizations are eligible to participate in the campaign? ________________
_____________________________________________________________________________
_____________________________________________________________________________
_____________________________________________________________________________
How is eligibility determined? ___________________________________________________________________________________
_____________________________________________________________________________
_____________________________________________________________________________
_____________________________________________________________________________
Has this method been satisfactory for management and employees? ______________
_____________________________________________________________________________
_____________________________________________________________________________
_____________________________________________________________________________
How do you handle organizations that are not included in the workplace campaign?__
_____________________________________________________________________________
_____________________________________________________________________________
_____________________________________________________________________________
13. Does the company have a committee to oversee the campaign?  □ Yes  □ No
If yes, who serves on the committee? Please check all that apply.
□ Communications professional
□ Payroll/finance administrator
□ Labor representative
□ Training specialist
□ Personnel representative
□ Other, please specify _____________________________________________
14. How are pledges currently recorded and summarized?
□ Manual data entry
□ Scanning technologies
□ Interactive voice response
□ Online pledge form
□ Other, please specify _____________________________________________
15. Who handles the processing of campaign pledges?
□ The company
□ An outside vendor
□ Other, please specify _____________________________________________
16. How are campaign funds collected distributed to the charities?
□ By United Way
□ By the company
□ Other method, please specify _________________________________________
17. How much choice do employees currently have to direct their contributions to specific
charities through your workplace giving campaign? (Check all that apply.)
□ Campaign follows local United Way designation policies.
□ Campaign operates independently of local United Way.
□ Employees may direct their gift to any health or human-service agency.
□ Employees may direct their gift to any 501(c)(3) nonprofit organization.
18. Do you promote or encourage designations?  □ Yes  □ No
19. How are employees recognized and thanked for their participation?
- Letter
- Gift (describe below)
- Recognition event (describe below)
- Participation pin
- Other (describe below)

20. Is campaign pledge data available in a timely manner and separated by region and/or location?
   Available in a timely manner?  ☐ Yes  ☐ No
   Available by region/location?  ☐ Yes  ☐ No

---

Campaign Performance

Provide a three-year history of your workplace campaign results.

<table>
<thead>
<tr>
<th></th>
<th>19__</th>
<th>19__</th>
<th>20__</th>
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<tbody>
<tr>
<td>Total Amount Raised</td>
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<td>Company Contribution</td>
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<td>Employee Contribution</td>
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<tr>
<td>Total Number of Employees</td>
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<td>Headquarters</td>
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<td>Operating Units</td>
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<td>Total Number of Contributors</td>
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<tr>
<td>Headquarters</td>
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<tr>
<td>Operating Units</td>
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<tr>
<td>Number of Volunteers Involved</td>
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<tr>
<td>Headquarters</td>
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<tr>
<td>Operating Units</td>
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<tr>
<td>Campaign Administrative Budget</td>
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</tbody>
</table>
### Employee Workplace Giving Survey

1. Are you aware of or have you participated in the workplace giving program at our company?
   - I am aware.  
   - I have participated.
   - [ ] Yes  [ ] No  
   - [ ] Yes  [ ] No

2. What is your overall opinion of the campaign?
   - [ ] Very favorable
   - [ ] Somewhat favorable
   - [ ] Somewhat unfavorable
   - [ ] Very unfavorable

3. Is the annual campaign an attractive way for you to support the community?
   - [ ] Yes  
   - [ ] No

4. What do you see as the major advantages of the campaign?
   - ________________________________
   - _______________________________________

5. If you don’t contribute, what would encourage your participation? (Check all that apply.)
   - [ ] More information about how my contribution is used.
   - [ ] Less pressure to contribute.
   - [ ] More charitable organizations to choose from.
   - [ ] More publicity and activities related to the campaign.
   - [ ] Incentive prizes.
   - [ ] I simply choose not to give to the campaign.
   - [ ] Other, _______________________________________

6. Would having more charitable organizations and more flexibility to direct your contribution to a specific charity make the campaign more or less attractive to you?
   - [ ] More attractive
   - [ ] Less attractive
   - [ ] Makes no difference

7. If provided the opportunity to direct your giving to a charity or issue of your choice, what types of issues or groups would you choose? (Check all that apply.)
   - [ ] Local charities
   - [ ] National charities
   - [ ] International relief and development charities
   - [ ] Environmental and conservation charities
   - [ ] Human and community service charities
   - [ ] Health charities
   - [ ] Advocacy, community organizing and social justice charities
   - [ ] Other, _______________________________________

8. If you have more organizations to choose from in the charitable workplace campaign, would you?
   - [ ] Give more through the employee campaign?
   - [ ] Give less through the employee campaign?
   - [ ] Give about the same but distribute your giving between current and new organizations?

9. How can the campaign be improved?
   - _______________________________________
   - _______________________________________
   - _______________________________________
   - _______________________________________

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Appendix D
Characteristics of Effective Workplace Giving Campaigns

The following characteristics represent the standards that leading corporate charitable workplace giving programs demonstrate.

Visible Executive Leadership

- Executive endorsement and corporate commitment to a strong workplace giving program with defined goals and objectives.
- Recognition of the value that a workplace giving program adds to the company, its employees and the community by supporting issues important to all stakeholders.
- Visible and active involvement of senior company officers in the campaign.
- Middle management support that allows company time for campaign volunteer training, employee meetings and educational activities.
- Company-sponsored or supported leadership giving program for employees at all levels.
- Support for a strong corporate giving program that matches employee contributions.

Employee Involvement and Ownership

- An employee steering committee to evaluate and recommend the workplace campaign design.
- A process to measure and evaluate employee perceptions and interests regarding charitable giving and the workplace giving program.
- Sponsorship of workplace giving program activities and events that encourages employee involvement.
- Promotion of employee and executive volunteer involvement in the community.

Focus on Communication and Education

- Year-round employee communication providing factual information about how contributions are used in the community, and the nonprofit agencies that participate in the workplace giving program.
- Using company communication channels (i.e. Internet and intranet, newsletters, e-mail, voice mail, payroll stuffers, etc.) to promote employee involvement and participation.
- Providing links to charity Web sites.
- Promotional activities such as agency tours, fairs, speakers which offer a chance to learn about how nonprofit agencies address community problems.
- Retention of personal peer employee solicitation.
- An employee thank-you and recognition program.

Campaign that Promotes Choice

- A program that offers employees the opportunity to support a wide range of organizations and issues important to them.
- Active involvement and participation of a variety of nonprofit organizations.

Use of Technology

- Communication technology used to inform and educate employees about services provided through the workplace giving program and participating nonprofit organizations.
- Technology applications that make it easy for employees to contribute.
- A cost-effective means to process pledges and distribute payment to recipient nonprofit organizations.
- Technologies to monitor campaign progress and provide feedback to campaign volunteers throughout the process.
Appendix E
Frequently Asked Questions

With all the giving options available to employees today, why should my company conduct a workplace giving campaign?

Workplace giving is a highly valued tradition and is an effective way to raise money for nonprofit organizations. Recent surveys show the value placed upon the annual campaign by the company and its employees. In one survey, nearly two-thirds of all employees believe their company should offer a workplace giving campaign. A 1999 survey conducted by Independent Sector found that being able to give through payroll deduction has a strong connection to giving, and 46 percent of the respondents reported that being asked to give at the workplace is an important reason for contributing to an organization.

We know that contributions made through payroll deduction are generally between four and six times larger than gifts made through other means. Workplace giving is the highest yielding and lowest cost method of fund raising for charitable organizations, and is best achieved by giving employees a list of varied and diverse charities as part of the campaign materials. A listing of pre-approved charities is the assurance to employee that these organizations meet the highest standards and is a way to motivate employees to make a giving decision. The value and convenience of payroll deduction is a real plus from a cost point of view.

Employee interest in the workplace campaign seems to be decreasing at my company. Is there anything we can do to revitalize our campaign?

If employee participation in your workplace giving campaign is decreasing, your company is having the same experience as many other companies. In recent years, employee participation has decreased from an average of 45 percent to less than 35 percent. Yet while employee participation has decreased, the average gift is increasing. The growth in United Way campaigns is coming from leadership gifts of $1,000 or more.

Companies with increases in participation often have taken the time to assess their campaigns. These assessments include conducting a survey of employees to identify attitudes and perceptions regarding the charitable giving campaign. Companies have used the information to make their campaigns more responsive to the needs and interests of employees.

As a beginning, your company may want to consider doing an analysis of trends in the campaign, conducting a survey of employees and identifying what changes you can make to renew the campaign.

Is the traditional United Way workplace campaign still the best option to meet the needs of my employees?

Employees, growing accustomed to expanded and flexible benefit choices in the workplace and increased consumer options, have expressed a greater desire to control their charitable contribution activities as well.

While most United Ways accept and process donor designations when employees write in the charity of their choice, this does not introduce employees to charities they may not know. Research indicates that employees experience greater satisfaction when they are able to give to charities addressing issues that are important to them. Employees feel more closely connected to companies that are sensitive to their interests and empower them through choice. As far back as 1991, United Way of America research showed that 70 percent of all employees want choice beyond United Way agencies in the campaign.
For many people, the workplace is their only contact and involvement with organized philanthropy and charitable giving. Substantial potential is lost if workplace campaigns do not provide employees with the opportunity to support issues they care deeply about.

**What is the future of workplace giving?**

Workplace giving remains a viable option for raising money for charity but, more importantly, it remains an effective vehicle to address a company’s employee relations and community relations objectives. Too often the campaign has become a routine administrative matter. As one company executive put it, “It’s easy to lose sight of the benefits of a campaign because we’ve done it for so long. We may not even be considering whether there are strategic benefits to the corporation.”

In the future, companies will assume ownership of the campaign and brand it to fit their unique corporate culture and the needs and interests of their employees. We expect the campaign will be integrated with other employee involvement programs such as matching gifts and employee volunteer programs and will offer a portfolio of charitable choices.

Technology will be used to market the campaign, educate employees about the charitable choices available to them and to administer the campaign.

**Can I revitalize my workplace giving campaign without increasing the cost and time necessary to run an effective campaign?**

Yes. A revitalized workplace giving campaign creates a partnership with the participating nonprofit organizations. Working together, the campaign can be designed to meet corporate goals, support employee interests and provide maximum revenue to the participating charities without adding to the cost and burden of running the campaign.

The company retains the right to manage the campaign and can determine the most cost effective approach. The application of technology can help make the campaign more efficient.

**If we change our campaign, what effect will it have on my local United Way?**

United Way remains an important part of the campaign, but the company assumes ownership to ensure the campaign is responsive to its needs and employee interests. Assessing the campaign and integrating it with other employee involvement programs will strengthen it for all participating charities. A well-organized campaign that promotes employee involvement and giving will increase donations and participation.

**How does technology affect the workplace campaign?**

Companies are beginning to use technology to help manage and implement the workplace campaign. Some companies are using electronic pledge forms, online donation systems, telephone response pledging systems and electronic communications with employees. There are specific examples to help companies identify available technological resources.

Using technology should not replace the personal touch. Passively run campaigns are doomed to failure. Technology can help with transferring funds and pledge systems, but it is important to continue to use volunteers to ask for donations and answer questions.

Technology can play a key role in developing the relationship between employees and charities. For example, the Internet can help employees learn more about participating charities, their services and volunteer opportunities.

In a 1999 survey conducted for America Online by Roper Starch, 29 percent of the 505 participants said they would be interested in making online donations to charity. Interest among young people was particularly strong – 53 percent of the respondents between the ages of 18 and 24 said they were inclined to donate online compared to only 17 percent of respondents over the age of 50.
In addition to reaching new donors, the Internet also provides an opportunity to build relationships with a vast audience. Most people visit a charity’s Web site seeking information. Among the most important features of a charity’s Web site, according to the respondents of a 1999 Craver, Matthews, Smith survey, are: 1) an explanation of how contributions are spent; 2) a statement about the confidentiality of the information that donors share with the charity; and, 3) the option to make a donation online.