Purpose of this Guide

This guide is split up into two parts:

Part 1 = for your team
The content in this part is intended to help your team identify advocates and cultivate relationships with those individuals.

Part 2 = for your ambassadors
The content in this part is intended to serve as an out-of-the-box toolkit your nonprofit can personalize and then share with your brand ambassadors (e.g. board members, employees, business partners, etc.) to build a larger base of workplace giving supporters for your organization.
Part 1

Content for your nonprofit’s team
Stewarding Relationships
Value of Donor Stewardship

Workplace donors and volunteers are different than your regular donors and volunteers.

You have an opportunity to deepen relationships with donors and their companies.

Your corporate partners can make a big impact on your bottom-line.
Engagement needs to be meaningful

- Transformational, not transactional
- Connect them to your mission
- Meaningful impact
Steward your donors

Thank them:

• Offer additional ways to engage: events, volunteering, etc.
• Identify consistent, long-time donors
• Ask them to be an advocate for you in their employer’s campaign
Deepening Corporate Relations:
Evaluate - Educate - Explore
Evaluate Impact

- What are your company’s values?
- What are your company’s business goals?
- What are your company’s human resources goals?
- What are your company’s marketing and communications goals?
- What is most important to your employees and other key stakeholders?
- What is important to your company’s leadership?
- What would you like to be known for?
- What are you striving to accomplish?
- What type of change or community impact are you hoping to achieve?

Source: www.charities.org/Metrics-Methods-Measuring-Social-Impact
Educate through Storytelling

- 52% of employees want to share their own photos, videos, and experiences on their personal social media platforms.

- 48% would use designated company hashtags to share their own photos, videos, and experiences.

- Preferred social media platform is Facebook followed by Instagram, Twitter, YouTube, and LinkedIn.

Source: www.charities.org/Exceptional-Storytelling-Made-Easy
Explore ways to develop your corporate relationships

Present the case for deeper engagement:

• Identify the companies your workplace donors are with
• Give them your data
• Discuss potential for major gifts, sponsorship, etc.
Part 2

Content for your team to personalize and share with your ambassadors
How to Personalize & Use This Content:

What’s included?

- Educational content and messaging to help you explain what workplace giving is and how it helps your organization
- Statistics about how employers can benefit from engaging their employees in workplace giving and employee engagement programs that support your cause
- Messaging about America’s Charities, what we do, and our relationship/role with your nonprofit

How you can personalize it:

- Add your logo (for your convenience, we’ve included an “America’s Charities Partner” logo for you to use)
- Change the slide background colors and font to match your branding
- We’ve specifically created places throughout this deck for you to add your nonprofit’s messaging and talking points - just fill in those blanks! (We’ve entered those pieces in red font for you to easily spot)
- If something doesn’t apply to what you do or need (e.g. volunteerism), simply delete it.

Once you have personalized this toolkit - share it with anyone you believe would make a good workplace giving partner, or with stakeholders who can help you access potential workplace giving partners. We also encourage you to invite a member from our America’s Charities team to present this information with you, to help equip you with our decades of workplace giving experience and knowledge.
Our Mission

{Place your mission statement here.}

Our Goal

{1-2 sentences that specifically state what you hope to accomplish.}

Example:

“To improve the literacy rates of 1 million low-income middle school students in Detroit by 20% by 2056 through charity ABC’s Roots to Reading program and network of retired mentors.”
Become Part of Something Bigger, Together Through Workplace Giving!

Dear Ambassador,

Congratulations on joining our organization’s workplace giving movement!

Workplace giving is one of the most cost-efficient ways to support our mission and is also a proven way to engage employees in the workplace. As a leader in your community, you have the power to help {insert a brief statement about your mission/constituents they will help you serve}:

- Because others hear your voice, you can educate them.
- Because others feel your influence, you can change their behaviors.
- Because others answer your call, you can mobilize them to work with you.

The goal of this toolkit is to help you:

- Engage your community in {Your nonprofit name}’s workplace giving movement.
- Create a lasting culture of {what type of impact your work has in the community}.
- Serve your community.

Thank you for your hard work and passion for the cause. Welcome aboard!

Sincerely,

{Your leader’s name, title}
What’s Inside:

► WHAT
  o About workplace giving
  o Trends in workplace giving and employee engagement

► WHY
  o [insert slides that speak to your nonprofit’s impact and specific programs]
  o [insert slides that speak to WHY this partner’s workplace giving support matters]

► HOW
  o Ambassador role
  o Our workplace giving partner, America’s Charities
  o Resources and tools to support you
About Workplace Giving
What workplace giving is:

If you work for a company, organization or the federal government, chances are you’ve had the opportunity to participate in a workplace giving program. Workplace giving is an easy and efficient way to make tax-deductible donations to the charities you care about, typically with donations taken directly out of your paycheck.

(Donations via credit card, PayPal, stock options, vacation time and other methods might also be available depending on your employer’s program).
How workplace giving works:

Typical workplace giving campaigns occur in the Fall but many employers are moving to year-round employee engagement programs. When your employer holds its workplace giving campaign:

1. Find our charity and designate a set amount of money you would like to donate. Based on the program, you can do a keyword search on the workplace giving site or write-in our charity. If completing a paper form you can enter our EIN# or a number that has been assigned to us in your employer’s giving guide. {Insert your charity EIN # here}

2. With payroll deduction gifts, your donation will be deducted automatically from your paycheck for a 1-year period based on the frequency you receive your paycheck (typically 12, 24, or 26 weeks total throughout the year).

3. Your donation is combined with donations your peers have designated to our charity and then distributed to our charity in one, efficient lump sum (typically on a quarterly basis depending on the company’s funds management agreement)
Benefits of workplace giving:

1. **Convenience & Tax Benefits:** You get the convenience of automatic payroll deductions without losing the tax benefits of charitable giving.

2. **Financially More Manageable:** By having a smaller amount of money deducted from your paycheck throughout the year, you can donate a larger amount of money and have a greater impact overall. For example, if you get paid biweekly (26 times throughout the year) and you pledge $38.50 of each paycheck to a charity, by the end of the year you will have donated $1,000 to that charity!

3. **Matching Gifts:** Some employers will offer to match your contributions up to a specified amount. This leverages your employer's philanthropic support and maximizes your gift to the causes you care about.

4. **Cost-efficient and Sustainable Fundraising:** Workplace giving is more cost-effective and efficient for charities to raise funds than other fundraising methods. The cost of participating in a workplace giving campaign is far below the cost that would be incurred if participating charities had to launch any type of campaign to try to raise an equal amount of money. Your donation enables charities to spend more time and resources on services and programs rather than elaborate fundraising.

5. **Unrestricted Money:** Your donation provides charities with a sustainable, year-round source of funds. And because this money is 'unrestricted', your donation provides charities with funds that enable them to decide how to best use that money and invest in their ability to deliver vital programs and services. Unrestricted money goes a long way in helping nonprofits budget and plan how to best make an impact with donor dollars.
Trends in Workplace Giving and Employee Engagement
The Workplace as an Effective Conduit

- 87% of companies understand there is an expectation to support causes/issues that are important to their employees.
- 86% of companies say their employees expect them to provide opportunities to engage in the community.
- 58% of employees want to work for a company where the culture supports giving and volunteering.
- More than 58% indicate they volunteer time through the workplace and more than 46% indicate they donate money through the employee giving program.

Above is a summary list of key stats to quote from America’s Charities Snapshot 2017 report. For your convenience, we’ve included several graphics on slides 8-33 that speak to the stats listed above, plus more. Use as many of these graphics as you’d like and delete the ones you don’t wish to use. We also encourage you to save those graphics to your files and share on social media or on your website’s workplace giving page.
BIG WORLD CHANGE

Contributions from employees and their employers through local-level workplace giving and employee engagement programs add up to big world change and impact.

More than 50% of companies indicate the number of employees who give and the amount they give is increasing. The number of employees who volunteer is increasing and the amount of time they give is growing as well.

Millennials consider the “charitable” route an impactful method of changing the world around them. Smaller-scale activities at the local level – particularly in the workplace - provide millennials with a greater sense of influence.

A well-designed corporate social responsibility program can increase employee engagement up to 7.5%, increase employee productivity by 13%, reduce employee turnover by 50%, and increase revenue by as much as 20%.

Millennials with opportunities to give in the workplace show a greater level of loyalty, have a more positive opinion of business behavior, and are less pessimistic about the general social situation in society.

Employee giving programs account for more than $4 billion in charitable contributions, much of which is unrestricted, sustainable support, and companies give more than $17 billion to nonprofit organizations each year.

Nonprofits value activities they feel generate more donations, like corporate matching gifts, year-round giving and grants that recognize employee volunteer service. They also place high value on employees promoting their favorite charities to their peers.

Sources: (1) America’s Charities Snapshot 2015; (2) Deloitte Millennial Survey 2017; (3) Project ROI; (4) America’s Charities Snapshot 2014.
Top 5 Influencers for a Positive...

**Giving Experience**
1. 80% Trust that the funds are well spent
2. 76% Ability to choose causes that I care about
3. 70% Ample information about the nonprofit or cause
4. 56% Ability to donate how and when I want
5. 53% Flexible donation options

**Volunteer Experience**
1. 69% Project is clearly organized with defined scope and expected results
2. 67% Paid time off
3. 65% Ample information about the nonprofit or cause
4. 64% No pressure from employer or colleagues
5. 62% Ability to volunteer during business hours

Source: www.charities.org/snapshot2017
Nonprofit Info & Impact Stats Slides 11-13

(delete this slide - it is only to instruct you on what type of stats are listed in this section)
Employee Expectations of Nonprofits

78% of employees said it was imperative for nonprofits to demonstrate impact, while 70% of nonprofits said it was a significant challenge to demonstrate impact.

70% of employees said having ample information was very important for a positive donation experience and 65% said ample information was crucial to a positive volunteer experience.
65% of employees said ample nonprofit information was crucial to a positive volunteer experience.

70% of employees said ample nonprofit information was very important for a positive donation experience.
78% of employees said it was imperative for nonprofits to demonstrate impact, while 70% of nonprofits said it was a significant challenge to demonstrate impact.
Giving Platform Technology Stats (slides 15-18)

(delete this slide - it is only to instruct you on what type of stats are listed in this section)
40% of employees say an easy-to-use online platform is extremely or very valuable to them.
50% of employees say an online platform is imperative or very important to having a positive donation experience.
Technology's Role in Employee Giving & Volunteer Programs

- More than 40% of employees say an easy-to-use online platform is extremely or very valuable to them.
- 50% say an online platform is imperative or very important to having a positive donation experience.
- More than 55% say it is imperative or very important to have an easy-to-find platform to register, participate, and track hours online.
55% of employees say it is imperative to have an easy-to-find platform to register participate, and track hours online.
Charity Choice Stats (slides 20-25)

(delete this slide - it is only to instruct you on what type of stats are listed in this section)
Choice is Critical to Workplace Donors

76% say the ability to choose causes they care about is very important to a positive donation experience.

63% say it’s extremely valuable or very valuable to have choice of the individual nonprofit or cause that they can give to.

30% say the reason they do not give through the workplace is because the causes they care about are not available as choices.
76% of employees say that the ability to choose causes they care about is very important to a positive donation experience.
63% extremely valuable or very valuable to have choice of the individual nonprofit or cause that they can give to.
48% of employees say it is imperative or very important that their employers offer opportunities to pursue their own charitable interests or causes.
87% of companies understand there is an expectation to support causes that are important to employees.

48% of donors say it is imperative or very important that their employers to allow them to pursue their individual charitable interests.
30% of employees say the reason they do not give through the workplace is because the causes they care about are not available as choices.
Participation, Recruitment, & Retention Stats (slides 27-33)

(delete this slide - it is only to instruct you on what type of stats are listed in this section)
America's Charities

Top Five Motivations for Workplace Donors

- Paid Volunteer Time: 64%
- Employer Match: 58%
- Easy-to-Use Technology: 47%
- Volunteer Service Grants: 47%

More than 58% of employees indicate they volunteer time through the workplace.
More than 46% of employees indicate they donate through a workplace giving program.
46% of employees donate money through workplace giving programs.
58% of employees engage in volunteer time through the workplace.
86% of employers say their employees expect them to provide opportunities to engage in the community and 58% of employees want to work for a company where the culture supports giving and volunteering.

America's Charities®
70% of employees say it is imperative or very important to work for an employer where mission and values align.

71% of employees say that they want to work for employers who have missions and values that align with their own personal values.

48% of employees say it is imperative or very important that their employers offer opportunities to pursue their charitable interests or causes.
71% of employees say it is important to work for a company where giving and volunteering is supported.
70% of employees say it is imperative or very important to work for an employer where mission and values align.
{Title of slide you’ve added to address the “Why” section}
Ambassador Role
Ambassador Role

You’re part of a network of leaders dedicated to helping our organization {insert brief statement about your work}. You may be working independently, but you’re not alone and you are vital to our organization’s success.

Ways to support us through your role:

1. Help us access employers who will feature our charity through their workplace giving campaign

2. Bring workplace giving to your company and feature our charity as your company’s featured cause

3. Donate to us through your company’s workplace giving campaign and share with your colleagues why you support us (that will inform them about our work and encourage them to support us too)

4. Spread the word! Use your social media networks and share our work with your contacts and encourage them to support us through their workplace giving program or bring workplace giving to their company so they can support us.
Other Ways to Support Us

{Use this slide to highlight your other workplace-related programs and opportunities - such as volunteer opportunities, corporate sponsorship, special events for companies to engage employees through, etc. }
Contact our team to tell us about your success bringing workplace giving to your company and featuring our organization - we can feature yours/your company’s story on our site and use it to inspire others to take action.

Stay connected with our team and follow us on {list social media sites, newsletter, etc} for updates about our work, impact, and current initiatives where your team’s support is needed most.
Our Workplace Giving Partner, America’s Charities
Who is America’s Charities?

They inspire employees and organizations to support the causes they care about. They do this in order to bring more resources to the nonprofits that are changing our world.

As Our Workplace Giving Partner, Here’s How America’s Charities Works With Us (and how they can support you as an ambassador):

- America’s Charities is a 501(c)(3) nonprofit membership organization. They apply on our behalf to public and private workplace giving campaigns all across the country, helping us access more employee donors and as a result- more resources.

- America’s Charities also manages workplace giving programs and distributes workplace giving funds. As our partner, they can help provide your team with the tools and resources you need to facilitate a workplace giving campaign and distribute funds to our charity.
Click here to watch a short video about America’s Charities and learn more about how they can support you as in your role:

https://www.charities.org/about
Resources and Tools to Support You
Giving Trends:
https://www.charities.org/giving-trends

White Papers and Guides to Help You Plan and Run a Workplace Giving Program:
https://www.charities.org/whitepapers-toolkits-guides

Technology and Solutions to Facilitate Workplace Giving:
https://www.charities.org/employee-giving-large-small-business-solutions

Who to Contact:
You can reach out to our partner, America’s Charities to start a program by contacting businessdevelopment@charities.org.

{If applicable, list person from your team to contact and/or page on your website for them to find more resources to support your charity through workplace giving.}