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The Ultimate Guide to

# **YEAR-ROUND EMPLOYEE GIVING**



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## Overview

Many companies offer employees the chance to take part in seasonal giving campaigns or in an annual day of service.

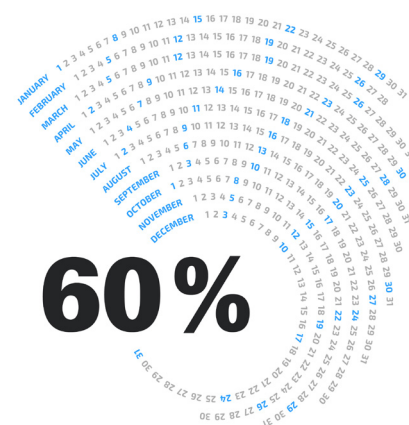
But for companies that are truly committed to building a culture that is focused on giving back, a once-a-year event or campaign often isn't enough.

Year-round employee giving campaigns offer companies an opportunity to increase employee engagement, build their public reputations, and make a larger philanthropic impact.

*“We continually hear from employees that they want meaningful opportunities to give back through the workplace,” says James E. Starr, President and CEO of America’s Charities. “By giving them the chance to contribute year-round, you are giving your company a leg up in attracting top talent while ensuring that your company is making a difference.”*

While America’s Charities 2015 Snapshot report shows that larger companies are more likely to offer year-round programs than their smaller peers, you don’t have to be a Fortune 500 firm to create an effective campaign.

By following the six steps outlined in this guide, companies of any size can build a program that will engage employees, position them as good corporate citizens and make a positive impact on charities and causes they care about.



**Year-round giving is becoming the standard, with more than 60% of companies saying their giving program is open year-round, according to America’s Charities Snapshot 2015 report. When asked that same question in Snapshot 2013, only 24% of companies indicated they offered this year-round option.**



## STEP 1

# Know Your Goals

Before you begin the process of setting up your campaign, it's important to take some time at the beginning of the process to identify what your company wants to accomplish.

Is your primary goal to boost employee retention? Attract more millennials? Advance a specific cause? Burnish your public reputation?

Many companies make the mistake of building workplace giving campaigns without first taking the time to establish what they hope to accomplish.

This approach might save time at the outset, but it can lead to poor decisions later in the process.

By setting clear goals, you set your company up to make smart, strategic decisions that will guide your campaign and provide you with a roadmap for measuring results.

Take time up front to engage key stakeholders and develop a clear set of objectives — and reap the rewards later! [Click here for questions to consider when defining your goals.](#)

## STEP 2

# Offer Incentives

Employees are more likely to give their time and money at work if the company also has some skin in the game.

If your program focuses on giving money to charities, consider a matching-gift program that incentivizes your employees and shows them that your company is committed to giving.

If you're creating a program that focuses on promoting volunteering, provide paid time off for those who give their time.

Some companies take time to involve their employees in creating incentives — and they are often able to identify creative ways to reward them for participation beyond time and money.

Others create special perks, offer public recognition, or develop game-like rewards to help make the process more fun and engaging.

Whichever path you choose, it's important to remember that incentives work.



**According to America's Charities' Snapshot 2015 Report, 65% of large companies match while only 28% of small to mid-size companies match. [Click here to read about "10 Companies Engaging Employees Through Exemplary Matching Gift and Grant Programs."](#)**

## STEP 3

# Create Experiences

People are more likely to give to what they can see and feel. As a result, it's important to find opportunities to connect your employees with the organizations and people they are helping through their giving.

If you host a kickoff party or event, invite nonprofits who are supported through your giving program to meet and mingle with your employees. Host a nonprofit fair. Coordinate site visits.

As you create opportunities for your team to connect with and learn about the organizations they support, their level of engagement will rise.



## STEP 4

# Make Participation Easy

Your program's success will depend, in part, on the number of hurdles you place in front of employees who are looking to participate.

If you are managing a year-round volunteering program, for example, it's important to make sure you offer flexible options for employees who want to give their time.

For charitable giving programs, use platforms that make it simple for employees to make and change their contributions. Services like [America's Charities Funds Management Solutions and online giving platforms](#), for instance, help employees select how much money they want to contribute via their paychecks and which charities they wish to support.

The system manages employees' designated contributions, and then aggregates those contributions for each nonprofit recipient.

Once those contributions are aggregated, each nonprofit receives a quarterly payment — along with an accounting of how much money each company and each employee has contributed. It also provides receipts and acknowledgement to each donor, so employee donors feel confident that their donations are being processed accordingly.



## STEP 5

# Show Your Impact

Giving is more than dollars or hours donated. It's about the lives that are touched and improved as a result of that time and money.

Take time to collect data about the impact of your employees' generosity and find stories that show how their efforts are making a difference.

By sharing data and telling inspiring stories about the impact of their philanthropy, you'll inspire more of your employees to give, you'll validate the generosity of those who are already contributing, and you'll provide important recognition to your partners and the causes they support.

You'll also be helping change lives.

Learn more about how to show your impact through this [how-to guide on storytelling](#).

## STEP 6

# Measure and Repeat

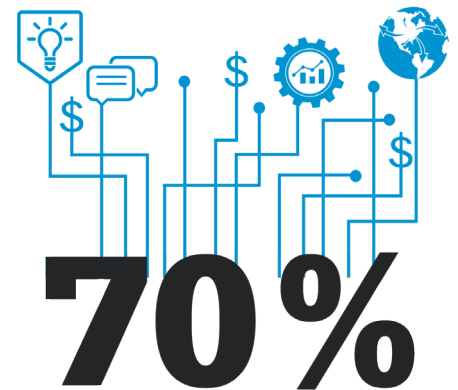
As you roll out and build your program, it's important to measure your results — and use those metrics to analyze progress toward the goals you set at the beginning of the process.

By collecting and analyzing data about your program, you'll not only show your impact, but you'll be able to refine your tactics and make improvements that will help ensure that you're getting the best possible return on your investment.

For more about measuring employee giving programs, check out [America's Charities' white paper on measurement](#).

By taking these steps, you'll help ensure that you're building a program that engages your employees and makes an impact that your leadership, shareholders and staff can be proud of.

You'll help your company achieve better results, attract and retain engaged employees and ensure that it is using its influence for good.



**More than 7 in 10 companies surveyed in America's Charities' Snapshot 2015 report say they plan to reevaluate their employee engagement strategies over the next 18 months. And, as they do so, they will be looking at metrics to help guide their decisions.**

# Benefits, Barriers, and Things to Consider

## Potential Benefits:



### Increase Participation and Giving

While your annual workplace giving campaign in November might work well for some employees, heavy workloads and holiday vacations might ultimately prevent others from having time to participate in your campaign. Extending your employee giving program from a finite period to year-round offers more opportunities for employees to contribute when it's convenient for them. You might also find that employees who pledge via payroll deduction in November want to make additional gifts later on in the year. Year-round giving offers them multiple opportunities to give, as often and as much as they want.

Also, if you have a bunch of new hires start in January or April, having a year-round giving program means they don't have to wait until November to participate in your program. You can leverage their enthusiasm as soon as they come on board!



### Opportunity to Test Out New Things

Holding a giving campaign once a year during a finite period of time puts a lot of pressure on coordinators to reach fundraising goals and achieve desired participation rates. Moving from a finite period to year-round giving provides a little more flexibility to test out new strategies, methods of giving, and campaign timing without compromising your year-end giving results.



### Improve Company-wide Awareness

Even with the best communication plan in place, with a giving program offered once a year during a finite period of time, you run the risk of employees being away on PTO or too busy with their workloads to be aware that you even offer an employee giving program. By providing multiple opportunities for employees to give year-round, you are more likely to catch your employees' attention, thereby helping you improve company-wide awareness of all the opportunities your organization provides for employees to give back to the community.



### Agility When Major Events Transpire

If a natural disaster occurs or tragic event impacts your community, having a year-round giving program means your team has the infrastructure, technology, and processes in place to act on a moment's notice, giving employees a way to quickly respond and show their support in a safe, effective manner.



## Possible Barriers to Success and Things to Consider:



### Employee Interest

According to early findings from America's Charities' [Snapshot 2017](#) report, employees say ***"It is imperative or very important that employers offer opportunities to pursue their personal interests and causes."*** You can offer a year-round giving program with multiple opportunities and methods to give, but if employees don't have the opportunity to support causes that matter to them, they won't participate in your program. Before launching your program, it's important to understand your employees' interests. Consider surveying employees to gain a clearer understanding of their giving preferences and use their responses to shape your employee giving program.



### Effective Communications

You can have a world-class employee giving program and the best online giving technology, but there is no substitute for the human touch and good communications. Passive campaigns are doomed to fail and technology should NOT take the place of personal solicitation.

The most successful initiatives are advertised well before they start and consist of visible reminders throughout the campaign. When planning your communication strategy, keep in mind the following:

#### **Frequency and Timing:**

Frequency is key, but you'll need to find a balance so your persistence comes off pleasant rather than pushy. The exact frequency will vary depending on when and how often your year-round giving initiatives occur. You'll also need to try communicating at different times during the day and different days during the week to learn when employees are most responsive and engaged.

#### **Multiple Media Channels:**

Leverage multiple communication channels to get your message across. Email is an easy channel to use, but don't underestimate the power of a simple flyer posted in the break room or a message displayed on the employee lobby TV screen. Also, consider holding an in-person event such as a campaign kick-off or charity fair. Events are a great way to engage and connect with employees in a compelling way not easily conveyed through email and print materials.



### Resources and Coordinator Burnout

It takes quite a bit of coordination to implement an employee giving initiative even just once a year, especially if executing your program is just one part of the coordinator's job. Before you commit to year-round giving, make sure you have a committed team and enough resources at your disposal to coordinate a year-round giving program.

# Year-round Giving Plan Template

Sample content has been included below to give you an idea of how to use this template. [Click here to download a blank template you can edit.](#)

## Year-round Giving Program Start/End Date and Payment Methods:

The start and end date is for your entire year-round giving program; not the individual initiatives that make up the program. Establishing a specific start and end date is especially important when it comes to managing payroll deduction donations. It's also important so your team can take a step back to celebrate your results and impact.

**Start:** January 1, 2018

**End:** December 31, 2018

### Payment Methods and Parameters:

Employees can donate anytime during the year via one-time payroll deduction, credit card, or PayPal. Recurring payroll deduction is only offered during the October cause initiative.

## Key Campaigns Promoted Throughout Year:

While your site may remain open for employees to donate through all year-round, this section should be used to plan key campaigns you'll promote to boost giving and participation.

### Quarter 1

**Campaign:** March for Meals Month Food drive to support elderly hunger

**Campaign Period:** March 1 - 31, 2018

**Method(s) of Giving Promoted:** Online and on-site food drive. Share list of specific food items needed and have employees donate those items either by dropping off the item at our office collection spot or by using our online food drive tool.

**Campaign Success Measure:** Collect 350 food items, accomplishing at least 75% of our goal and helping 150 elderly in our community.

### Quarter 2

**Campaign:** National Military Appreciation Month Crowdfunding Campaign

**Campaign Period:** May 1 - 30, 2018

**Method(s) of Giving Promoted:** Employees create fundraisers through our giving site to raise money from friends and family. Credit card or PayPal donations accepted.

**Campaign Success Measure:** 60% of employees participate (i.e. create a fundraiser in support of our campaign), generating \$50,000 to help provide 50 military veterans with job training and placement.

### Quarter 3

**Campaign:** Recreation & Parks Month Clean-up Volunteer Opportunity

**Campaign Period:** July 1 - 31, 2018

**Method(s) of Giving Promoted:** Have employees choose a local park (based on the community where their department or business area is located). They will volunteer time to clean-up trash, plant flowers and trees, etc.

**Campaign Success Measure:** Employees collectively volunteer 750 hours, saving local park nonprofit about \$18,105 worth of staff time.

### Quarter 4

**Campaign:** Payroll deduction open choice campaign (all 501(c)3 charities offered as employee giving choices)

**Campaign Period:** October 1 - 31, 2018

**Method(s) of Giving Promoted:** One-time and recurring payroll deduction, plus corporate matching gift (\$1 match for every \$1 donated up to \$100,000).

**Campaign Success Measure:** 80% of employees donate and at least 90% of the corporate match is utilized.





**Get Started! Contact Us.**

[www.charities.org](http://www.charities.org)

## **Ways America's Charities Can Help You**

From basic donation-only campaigns or stand-alone solutions like strategic advice and funds management solutions, to supporting employee engagement and CSR more holistically through workplace giving, peer-to-peer fundraising, volunteering, volunteer grants, in-kind giving, storytelling, social media and international giving, America's Charities helps employers of all sizes with their charitable giving needs. To learn more and tell us about your unique needs, please visit [www.charities.org/portfolio](http://www.charities.org/portfolio), or contact America's Charities Vice President of Business Development Kim Young at [kyoung@charities.org](mailto:kyoung@charities.org) or 703-674-5358.

## **Acknowledgements**

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