



HOW TO REVIEW YOUR WORKPLACE GIVING PROGRAM



THE AUSTRALIAN
CHARITIES FUND

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The Australian Charities Fund recommends an employer reviews its workplace giving program every two to three years to assess outcomes, gauge stakeholder feedback and identify opportunities for growth in order to develop a strategy for ongoing program management.

Your step by step guide

1. Gain support

- ★ Obtain leadership and key stakeholder support to conduct the review
- ★ Develop a project plan to identify review activities, assign responsibilities and track progress

2. Analyse your program

- ★ Review the program objectives. Why does the program exist and how does it support the organisation's strategy and/or values?
- ★ Review the program components. Does the program include activities that complement workplace (pre-tax payroll) giving such as employer donation matching, unskilled/skilled volunteering, pro-bono projects, resource sharing, workplace fundraising? If not, assess if complementary program activities would be appropriate for your organisation. Our experience and research has revealed employers and employees see workplace giving as broader than just regular pre-tax payroll donations. They want to engage with their programs through multiple touch-points.
- ★ Review how the program is managed. Is it the sole responsibility of the program manager or do you have an active Committee and Champion network? What would be the most effective program management structure for your organisation?
- ★ Gather and analyse data that represents the 'true value' of the program. For example:
 - ★ Employee participation (%) by job classification/role; division; location
 - ★ Gender of each donor versus gender breakdown of total workforce
 - ★ Total workplace giving donations (\$) by job classification/role; division; location
 - ★ Donation amount and number of donors to each charity by job classification/role; division; location
 - ★ Employer matching amounts per charity, if relevant

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the program objectives.

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- ★ Amounts raised for charity partners through workplace fundraising events, if relevant
- ★ The number of employee volunteer hours contributed to charity partners through employer approved events, activities and skill sharing projects, if relevant.
- ★ Review the program budget. Where has the budget been spent? Is the budget sufficient to achieve program objectives?
- ★ What is the program target? How is this measured?
- ★ Does the organisation match employee donations? Is there scope for matching? Approximately 75% of programs supported by The Australian Charities Fund provide some level of donation matching. Our research has found that matching employee donations is a key motivator for employees to participate in a workplace giving program. We strongly encourage employers to match their employees' donations when possible.
- ★ How is the program promoted to employees, e.g. through the recruitment process, induction program, campaigns, promotions?
- ★ How is program impact communicated to employees? How often do you communicate impact? What is the readership level of communications? What communication channels work best in your organisation?
- ★ How are complementary giving at work activities, such as volunteering, pro-bono projects, workplace fundraising, etc. managed and reported?



3. Obtain Stakeholder Feedback

- ★ The purpose of gaining insights from stakeholders about the program is to:
 - ★ Understand key drivers or barriers for participation
 - ★ Assess awareness and relevance of current charity partners
 - ★ Measure interest in workplace giving, fundraising, volunteering, skill sharing and other staff engagement activities
 - ★ Identify preferred communication methods and content.
- ★ Design and conduct an online or paper-based survey to capture employee feedback in line with the above objectives. The survey can also call for expressions of interest from staff members to participate in the committee and/or become program champions, if required
- ★ We recommend additional feedback be obtained through one-on-one interviews with donors, non-donors, champions, leaders and charity partners

4. Prepare recommendations

- ★ Analyse survey and interview results
- ★ Prepare draft program recommendations for the following areas:
 - ★ Program objectives: Articulate why the program exists and how it supports the organisation's strategy and/or values.
 - ★ Program components: Identify if the program is a stand-alone workplace (pre-tax) giving program or if it does or should include broader community initiatives such as volunteering, pro-bono projects, workplace fundraising etc.
 - ★ Program management structure: We recommend the establishment of a committee and champion network to oversee the ongoing management and promotion of the program.
 - ★ Budget: Include items such as employer matching amount (if relevant), cost of producing promotional collateral, IT development costs for digital promotion, re-launch event costs, donation impact reporting communications, ongoing program promotion, costs associated with volunteering activities, etc.
 - ★ Goal: Establish an employee participation rate goal for your workplace giving program. As a guide, best practice workplace giving programs generally achieve a 30%+ participation rate. It's best to translate your goal into actual numbers of donors. Identify the process for goal measurement and reporting.
 - ★ Charity partner review: Determine if you will add or remove charity partners. Adding or removing charity partners will not automatically result in more employees giving through the workplace. Often a low employee participation



rate is due to low program promotion, not taking a holistic approach to giving through the workplace, not communicating donation impact and/or charity partners not being aligned with organisational strategy or employee interests. Carefully consider these points before deciding to add or remove charity partners. A key aspect of the ongoing success of a program is your organisation's ability to manage program relationships and communicate outcomes from the collective donations. The Australian Charities Fund's experience is that typically great results are achieved when programs have a small number of charities (one to five for small to medium employers and four to eight for larger employers). If you do decide to remove charities from your program, we recommend adopting a 'grandfathering' arrangement. In this situation, existing donors may continue to donate to those charities removed from the program, however, those charities are no longer promoted as part of the program and new donors cannot support them through the program.

- ★ New employees: Identify how the program will be promoted to new employees, e.g. educating them through the recruitment process, adopting an opt out scheme in which new employees are automatically signed up, through their offer of employment letter, to give a small amount (\$1 or \$2) per pay, champions speaking at the induction program, a personal letter from the CEO, or similar, sent after the employee's first pay which encourages them to join the program.
- ★ Promotion: Running one or two campaigns throughout the year will continue to raise awareness of the program and encourage employees to join, without creating 'charity fatigue'. Schedule promotions around Workplace Giving Month (in June). The Workplace Giving Month Employer Partner Resource Kit, in the Library section of The Australian Charities Fund's website, is full of ideas for program promotion. Employees who do not give regularly can be encouraged to make one-off donations through workplace giving. A good time to ask is before end of financial year (during Workplace Giving Month) or

Christmas, as these are the main times during the year when people tend to make one off gifts.

- ★ Communicating impact: Employees want to hear their support (donations, time and skill sharing) matters, and expect feedback. Our research consistently shows both donors and non-donors want to hear real-life stories and information on specific projects to show the impact. We recommend communicating impact at least two times per year. See our online resource *How to Communicate Donation Impact* for more information.
- ★ Staff engagement: Many employees want workplace giving to be social and collaborative. Identify ways your employees can get further involved. Possibilities include unskilled volunteering, skilled volunteering, workplace events with the charities to build awareness, workplace fundraising for workplace giving charity partners, resource sharing, and site visits. Consider running a workshop with your champions and charity partners to scope employee engagement initiatives and develop a calendar of events for the coming year. See our online resource *How to Develop a Champion Network and Staff Engagement Plan* for more information.

5. Put your plan into action

- ★ Hold a meeting with senior leaders or Committee to discuss the review findings, draft recommendations and agree an action plan
- ★ Update your project plan to incorporate agreed recommendations
- ★ Assign a leader for each initiative
- ★ Plan/co-ordinate logistics with stakeholders
- ★ Track and review outcomes with the Committee every three months. Refine your action plan as required

Need further help?

ACF provides consulting services to review and refresh workplace giving programs. With our experience and research insights, we have a great track record in helping employers to achieve highly successful programs.

“Collins Foods recognise the important role ACF provide in the development and growth of workplace giving in Australia. ACF provided essential assistance in the set-up and implementation of our Workplace Giving Program. The ongoing support and guidance from the ACF Team ensures our Workplace Giving Program continues to evolve and employee participation remains strong and growing.”

Kevin Perkins
Chief Executive Officer



For further information or advice, please contact The Australian Charities Fund on 02 9024 8630 or visit www.australiancharitiesfund.org.au



Other related resources:

For online support, see ACF's *How to Communicate Donation Impact* and *How to Develop a Champion Network and Staff Engagement Plan*, in the Resources section of the Library on our website.

The Australian Charities Fund also provides consulting services on workplace giving program set-up, champion networks, staff engagement plans, communications and collateral. For further information or advice, please contact The Australian Charities Fund on 02 9024 8630 or visit www.australiancharitiesfund.org.au

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