

Workplace Giving DIY Guide

1. Get motivated

The smart way to give

Workplace giving (WPG) engages your employees, has a positive impact on the community and, ultimately, improves business performance.

A successful program will bring your organisation's values and culture to life – helping your staff find a greater sense of purpose at work, and get involved with activities that develop pride, foster teamwork, enhance motivation and create social change.

So, what is workplace giving?

WPG is when employees make small, regular donations through their pre-tax pay. It's simple, low cost and extremely effective.

You can also boost the impact of your WPG program through donation matching, fundraising, volunteering, skill sharing and in-kind support.

Why workplace giving?

It's a win-win-win for business, employees and charities.

- You enjoy greater staff engagement, retention, productivity, reputation and social impact
- Your staff give in a smarter way and build a sense of pride in their employer
- Charities get low-cost, regular funds, access to valuable skills and strong partnerships

The fact is...

- 85% of employees think it's important to 'give back' through work (ACF 2013 – n4106)
- Workplace givers are more highly engaged employees (ACF 2013)

- Global research shows high employee engagement drives business performance
- CEOs believe workplace giving plays a critical role in talent management (ACF 2013)
- Australians see business investment in the community as one of the most important drivers of trust. 90% will choose to buy products or services from businesses they trust (Edelman 2009)
- Workplace giving responds to one of the significant challenges faced by charities today – finding stable and low-cost sources of funding

Discover...

- [Chartered Accountants Australia and New Zealand](#) have seen a positive impact on work culture through workplace giving
- [Commonwealth Bank](#) true partnership between company and staff
- [SEEK](#) puts workplace giving at the heart of its business
- The [Hon Malcolm Turnbull MP](#) is passionate about workplace giving

Join the movement to see **1 million** Australians contributing through workplace giving. And drive employee engagement and social impact in the process.

What will it take from here?

1. **Leadership** – executive support is vital for workplace giving success
2. **Strategy** – align workplace giving with business objectives and values
3. **Resource** – identify a team member to develop and manage the program using this DIY Guide

2. Get set up

Shape your program

There is no one-size-fits-all WPG program. To ensure you get the best program for your organisation, your staff and your charity partners, follow these simple steps...

Put a plan in place

Structure

Will your WPG program only focus on pre-tax payroll giving, or will it include company matching, workplace fundraising, volunteering, skills sharing and/or in-kind support?

Set a goal

Aim for at least 30%-50% staff participation. Build in other targets, such as number of volunteering days and value of in-kind support, as relevant.

Do your bit

Employer matching motivates employees to participate and has a positive impact on company culture. So, if you are serious about workplace giving, consider including a [matching option](#).

"What appealed to me is doubling the money (through matching). The charities I support through workplace giving get more, simply because I give through work."

Workplace giving donor

Setting up is easy

Use the [Project Plan](#) to help get your program started.

Find the right causes

Choosing charities

There are more than 28,000 charities – or Deductible Gift Recipients (DGR) – in Australia that staff can make tax-deductible donations to. It's important to figure out what causes are important to your business so you choose charity partners that are the right 'fit'. Find out how with our [Charity Selection Matrix](#).

Talk to your staff

Get your staff involved right from the start. They need to know why you're establishing a WPG program and how it fits with your culture, business strategy and values.

Send out a [staff survey](#) to gain insights about the social causes and charities your employees are passionate about. You can also use the survey to:

- Find out if employees would like to volunteer or take part in skills sharing
- Recruit 'champions' – employees who are keen to develop and promote your WPG program internally
- Generate ideas for the program's 'brand'
- Learn how employees would like to receive feedback on the impact of donations

Less is more

In our experience, choosing a few charities is the way to go. This not only makes it easier to promote your charity partners and their work, but the social impact of the donations is greater.

Find a selection of leading workplace giving charities [here](#). You can also find more good causes at [Our Community](#).

To confirm a charity has Deductible Gift Recipient (DGR) endorsement, view the [Australian Business Register](#).

Once you have a shortlist of potential charity partners, talk to them about:

- What they do and how donations will help
- How the relationship between your organisations will work
- Any volunteering or skill-sharing opportunities that may be available; and
- How often they can report back to you (ideally 1-2 times a year)

Then, update the Charity Selection Matrix and decide if they are a good fit.

ACF research (2013) revealed that workplace giving programs are more successful when causes and charities have organisational relevance – something the business and its employees can relate to and support together.

3. Getting staff to sign up

Opt-in for existing staff

Your existing staff will need to opt in. But don't make it a chore – use it as an opportunity to promote WPG and the positive impact your staff can have when they give as a team. See the [Get Giving](#) section for launch ideas.

Opt-out for new employees

Turning up to work, doing a job and getting paid is not enough for today's workforce – especially Gen Ys and Millennials.

Through opt-out, new employees sign up to donate a small amount via their 'Offer of Employment' letter, unless they tick the 'opt out' box. Experience shows 50-70% of new employees are keen to give and don't opt-out. Learn more [here](#).

Implement your program

All current payroll systems or accounting software can facilitate workplace giving. The set-up process is quite straightforward – similar to a SMSF or health fund.

Charity set-up

1. Obtain [charity bank account and key contact details](#)
2. Set charity partners up as vendors in payroll system

Employee set-up

1. Employee completes and submits [donation form](#), or authorises donation through employment contract



Payment management

1. Payroll keys in deductions
2. At month end, payroll sends funds to charity partners via EFT. Use a bank

deposit narration to help the charity track where donations have come from. Include the company's name and a workplace giving reference. For example, XYZ Ltd's narration would be "XYZLtdWPG"

3. If matching, determine when matching funds will be transferred to charity partners (e.g. monthly, quarterly, annually)
4. Charity partners acknowledge receipt of funds – an email is sufficient
5. Payroll produces monthly report for program manager, including:
 1. Participation % = total staff / number of employees giving pre-tax
 2. Total donation amount (per charity) per pay period
 3. Optional: location of donors; volunteer hours (if relevant)
6. At the end of financial year, total workplace giving donations are recorded on each employee's PAYG summary

Handy facts

- Workplace giving doesn't affect an employee's superannuation and payroll tax calculations like salary sacrificing. Workplace giving reduces the donor's PAYG liability but it doesn't decrease their gross income
- Workplace giving eliminates the need for employees to keep records of charitable donations and guarantees they receive the tax benefits of donating each pay
- If you choose to enable staff to donate to any Deductible Gift Recipient charity, we recommend you consider engaging a third party provider to process donations to make it easier.

What will it take from here?

1. **Marketing collateral** – develop simple and powerful messages to get staff interested in the program
2. **Launch** – create a fun and engaging event or campaign to unveil the program and social issues you are supporting
3. **Keep it fresh** – give your workplace giving program some attention throughout the year to keep it running at its best

3. Get giving

Create a campaign

An internal campaign will bring your program to life, create cut-through and engage employees in workplace giving.

Top tips for your WPG campaign

1. Key concepts

- Leadership
 - An endorsement from your leader builds credibility and shows staff that supporting social issues is important to your organisation's culture
- Essentials
 - Why – the business is establishing the program; link messaging to culture, values, strategy
 - What – workplace giving is
 - How – employees can get involved
 - Who – the charity partners are
- The "ask"
 - Inspire – let employees know they'll be joining a giving movement and making a difference together
 - Keep 'sign up' simple – ask staff to donate \$1, \$2 or \$5 a pay or split their donation equally between charities

"If you convince me giving \$20 a month will make a difference, that will entice me. And then imagine if everyone in the company did that."

Workplace giving donor

2. What's in the name?

Build a brand that resonates with employees. For inspiration, check out these WPG brands from other businesses:

- Everybody Counts – Chartered Accountants Australia and New Zealand
- Hearts@Work – Hindmarsh
- Helping Hands – JB Hi-Fi
- Energy For Life – AGL

3. Key messages

- Giving staff a greater sense of purpose at work through engaging them with social issues
- The leadership team supports the program. Emphasise matching if relevant – "whatever you give, we give too"
- Workplace giving is a smart way to give – high impact, low cost, the power of giving together
- Staff can deepen their involvement by sharing their time and skills with charity partners

These examples of WPG campaign collateral will help you get started.

- [Brochure](#)
- [Poster](#)
- [FAQs](#)

You can also tailor the content and use it on your Intranet. For example:

- Workplace giving – a smarter way to give
- Giving together – for a matching program
- Meet our charity partners – include charity logos and a brief description
- Get involved – link to donation form and volunteering/skill sharing opportunities
- Making a difference
 - Design a contribution tally graphic (employee donations, matching, time, talent, in-kind)
 - Design functionality to upload updates from your charity partners on the difference your contributions are making

Launch with a bang

Seven tips to make sure your program takes off

1. Sending an email just won't cut it. Launch your WPG program with bang to create excitement and have some fun
2. Engage leaders – 95% of employees think giving should start from the top with CEOs and managers leading by example
3. Share the vision – employees who understand why the program has been implemented and why the charities were chosen are more likely to get involved

4. 'Seeing is believing' – get your charity partners involved in the launch
5. Mobilise your champion network – they can help distribute program collateral, answer questions and co-ordinate launch events
6. Motivate – consider an incentive such as double-matching if employees sign up at launch
7. Make "the ask" – 73% of employees sign up at launch or after a prompt. Desk-drop, email and make donation forms available at the launch event

1. Embed in employee value proposition

To help attract great staff and build a giving culture, follow these tips:

Recruitment

- Promote workplace giving as a benefit to prospective employees. Share information about the program on your website, in job advertisements and during your recruitment process to show prospective employees that your business is investing in the community

New employee induction

- 63% of employees would be happy to be automatically included in their company's workplace giving program? So, include an **opt-out clause** in Offer of Employment letters
- Include the workplace giving sign-up form in all 'new starter' packs
- Ask a champion to speak at inductions and get new staff excited about WPG
- Send new employees a letter from the CEO, sharing why the business encourages giving through the workplace and why it's important to your culture

Keep it fresh

Promotions

Like most things, WPG programs need some attention to keep them performing at their best! We recommend:

- One or two promotional campaigns throughout the year to keep the program "top of mind"

- Tap into Workplace Giving Month each June – an opportunity to give your program a refresh each year, and help reach the goal of 1 Million donors contributing through workplace giving.
- Share feedback from your partner charities about the impact your contributions are making
- Run WPG campaigns when employees think about giving, such as Christmas

Charity feedback

83% of employees want communications from their employer (not directly from the charity) about where and how donations are spent.

Good communication gets your staff more engaged, increases their pride in your organisation and gives them confidence in the way their funds are used. It also motivates non-donors to participate.

- Choose the right channel for your business (intranet, email, meetings)
- Communicating once or twice a year is 'just right'
- Share how much is being given and the impact it's having
- Use the [Charity Feedback Brief](#) to request input from charities

Staff engagement opportunities

Talk with your charity partners to identify other ways your staff can take part. Choose a few initiatives and add these to your annual program plan. Options might include:

- Unskilled volunteering (eg, maintenance, administration)
- Skilled volunteering (eg, sharing expertise, mentoring)
- Workplace fundraising events for charity partners
- Workplace information sessions about a social issue (eg, mental wellbeing)
- Resource sharing (eg, providing charity partners with meeting rooms, equipment, training)
- Charity site visits

Need help?

For information, email info@1mdonors.org.au