

Employee Giving Manager's Handbook

How to:

- engage employees
- have fun
- improve our community
- without leaving the office!



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1. Planning the campaign

Firstly, **thank you**. Your work as an Employee Giving Manager will make a difference in your community and in the lives of your coworkers. EarthShare encourages you to run employee giving in **the way that works best for you**. This handbook provides ideas and some best practices that have produced good results in many workplaces. (But it's not one-size-fits-all!)

We recommend you start planning your employee giving program at least one month, maybe more, before the kickoff. Larger companies usually need more time than small offices.

Create your plan, including budget and schedule

After you read this handbook, call your EarthShare representative to set up a planning meeting. We can advise you on a budget, schedule and activities that would work with your workplace's culture.

Your budget may include expenses for activities or gifts, and your schedule will include the entire campaign, with the most critical date being the kickoff event. Consider piggybacking on established events in your company; think about how you could use them to promote the campaign. For example, some workplaces have giving fairs, benefits fairs, staff meetings or events where the campaign could be featured.

Form a committee – Set a marketing message

Get immediate support by forming an employee giving committee. Involving others makes it easier and more enjoyable for you while getting lots of ideas for the campaign. Select committee members who are respected by coworkers and enjoy coordinating fun activities. Let the committee choose a marketing message for the campaign, something that promotes giving and fits your workplace culture. Use the message on all materials and internal communications tools.

Gain support from your organization's decision makers

Once you have a plan and budget, talk with your CEO or top manager. Discuss and get approval for the campaign, budget, and especially the kickoff event. Ask the company leadership to match employee donations. Ask him or her to write a letter or e-mail in support of the campaign that will be distributed to employees, and to attend the kickoff event. Get sample emails and letters at earthshare-oregon.org (in "Employee Engagement" section) or at <http://bit.ly/UMUouE>.

Quick Campaign Planning Steps

- Call EarthShare to set up a meeting
- Create a schedule and budget
- Form a committee of helpers
- Get your CEO on board

Tagline Ideas

These are taglines local companies have used:

- The Power of One. The Spirit of Us All.
- Your Passion, Our Purpose
- What Do You Care About?
- Give Like a Rock Star!



Get ideas

Talk with EarthShare about your campaign goals and the materials you would like to use. EarthShare has a basic brochure that works for most campaigns.

Decide on a pledge form

Ask your EarthShare representative for pledge forms. You can use an EarthShare Oregon Pledge Form or a Combined Pledge Form that includes all participating funds and federations on one form. Generic samples of both are on EarthShare Oregon's website. We can customize the pledge form for your workplace.

If you have more charities than EarthShare in your campaign, consider using a Combined Pledge Form. It's easier for employees to fill out and simpler for payroll staff to process. EarthShare can provide all types of pledge forms, and we work with other charities to ensure it works for everyone.

Consider offering electronic pledging

Electronic pledging (asking employees to make their gifts online) may be suitable for your organization. Talk to EarthShare about affordable options for software that eliminates pledge form paperwork and makes pledging more secure for all employees.

Distribute materials in person

If possible, you, your helpers or your CEO should hand a pledge form or a publicity flyer to each employee personally. This demonstrates the importance of the giving program and something the company believes in. Let them know campaign dates and when pledges need to be completed.

If your organization is too large to distribute materials personally, ask your committee or a volunteer from each department to pass the materials out.

Ways to get more people giving

If your company offers a corporate match of employee donations, highlight this in your campaign materials. Any match can dramatically increase the impact of an employee's contribution, and it encourages MORE people to donate. Just offering a match will increase employee giving by at least 20 percent, according to one recent study.

Provide employees several options for giving. Employees can make a donation of any size — when combined with the gifts of their co-workers, every small donation has a big impact! Some employees may choose to contribute more than \$500 per year. If so, they qualify as an EarthShare Leadership Donor. EarthShare honors leadership giving by including donors' names in the Annual Report and other benefits.

Pledge Form Samples

Go online to earthshare-oregon.org.

Click on “Workplace Campaigns”, then “Campaign Manager’s Handbook”.

Companies That Match Gifts

Many companies improve their employee giving campaign by matching employees' donations.

Does your company do that? If not, why not? More employees will give if they know their employer is making their donation go further.



Your Giving Program Checklist

One month (or more) before kickoff:

- Have a meeting with EarthShare and other charity representatives
- Set your kickoff date and wrap-up date. **Date:** _____
(A two-week campaign is ideal and keeps your time commitment manageable.)
- Meet with last year's employee giving manager in your office about strengths / areas for improvement.
- Ask your supervisor to help you get executive support for employee giving activities, if you run into roadblocks.
- Recruit extra helpers to ensure that your worksite has enough people getting the word out and you don't have to do everything yourself.
- Ask your workplace's top executives to:
 - allow time for a fun and educational event during the giving campaign and attend that event personally
 - endorse employee giving through a letter/email to all staff;
- Establish a goal to motivate donors and set a benchmark for success. It could be setting a number or percentage of donors, or a dollar amount you want to raise.
- Set strategies for your communications, prioritizing those with highest potential for giving (such as reaching out to current donors, encouraging payroll deductions).
- Learn about the work that EarthShare and your other charities do.

Three weeks before kickoff:

- Work with your helpers to plan a fun kickoff or other event that draws attention to employees' chance to pledge to charities. Think about what employee giving activities your co-workers enjoy. You can look back at your department's past year's activities for successful ideas.
- Plan your in-house publicity, such as emails and posters.
- Confirm your company's employee count and location with EarthShare so we can send you materials.



Your Campaign Checklist, continued

Two weeks before kickoff:

- Schedule a presentation by an umbrella group at a staff meeting or special event. They can take five minutes or less, and it will help your coworkers understand their giving options.
- Market employee giving. Hang posters with the upcoming campaign dates and send an email with a “sneak peek” of the campaign kickoff and other activities.
- Make sure you have enough brochures and pledge forms for each employee to get one.
- Ask your helpers to spread the word about your events and giving campaign options.

On the kickoff date:

- Hand out materials (a pledge form, flyer or brochure) to each employee. Give them out face-to-face instead of dropping them in mailboxes.
- Host your fun kickoff event that raises awareness of employees’ giving options.
- Have a decisionmaker or respected peer at the workplace ask employees to give (rather than just EarthShare alone.)

During campaign:

- Keep track of who has or has not pledged in your workgroup. Thank those who HAVE pledged, and send a reminder about employee giving to those who have not.
- Provide updates via email about how close you are to reaching the office giving goal.

Immediately after giving campaign wraps up:

- Remind co-workers that they can still make a late pledge.
- Thank any employee who contributed, and anyone who helped you organize events or giving with a note or email.
- Report the results of employee giving back to co-workers, and whether you accomplished the goal of the campaign.

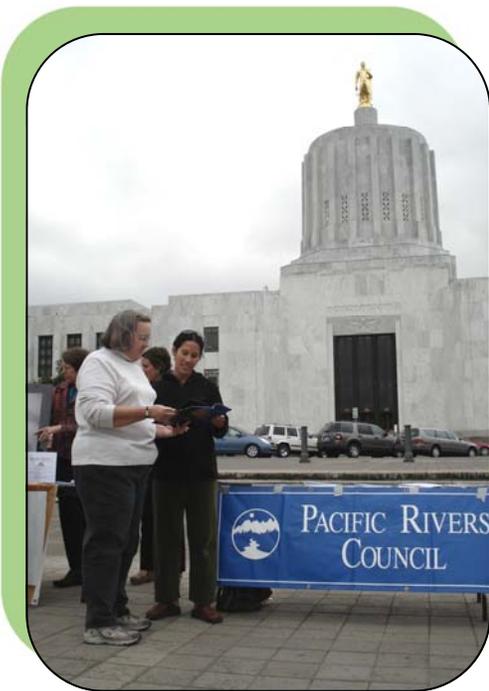


2. Kicking off

The kickoff is the single most important event in an employee giving program. Begin planning the event three weeks before the kickoff day. Follow these easy steps for the perfect kickoff:

Choose a visible location

Find a spot for the kickoff event, and include space for an information table. EarthShare and other charities can staff tables at your office where they can tell your coworkers about their organizations. Heavy-traffic spots like lunchrooms, auditoriums, or by the main staff entrance work well.



Employees at the State of Oregon get information at a kickoff event each year, under cloudy Oregon skies, of course.

Spread the word

Advertise, advertise, advertise. Start a couple of weeks before the kickoff with small steps, such as e-mails or flyers. Also, talk to your coworkers about employee giving; let them know it's coming soon. Maybe add articles on your company's intranet or internal newsletter about the kickoff. Visit earthshare-oregon.org for sample articles. Look in the "Employee Engagement" section, click on "Campaign Tools", then "Marketing Your Campaign".

Encourage turn-out

Choose a time of day when most employees would be able to attend, then offer something that will make your co-workers **want** to come to your event. A light lunch; bagels or pastries; sweet treats and prizes all bring people together. Possibilities for a fun event are endless.

Kickoff Events: Four Easy Steps

- Choose your (high traffic) location
- Use email, flyers, posters, newsletters to get the word out
- Provide an incentive to attend the kickoff event
- Ask co-workers and nearby businesses to donate prizes



Brainstorm with coworkers and committee members to find the perfect approach for your employee giving program. Or, ask your EarthShare representative for successful and fun ideas. You can incorporate the theme into the prizes and advertising that will be long remembered in your organization.

Gather prizes

Give away prizes to employees who attend the kickoff event. EarthShare has prize items available, or your company may also have items like coffee mugs, hats, and other promotional items to give away.

See the complete list of ideas for maximizing the benefits of offering employee giving on the next page!



Some EarthShare member groups can offer paddle trips like this one, as well as other experiences and items, as employee prizes for contests and drawings.



Limited funds, time or support?

When you feel that you do not have the time, money, or help necessary to offer employee giving, use this list or call your EarthShare representative to help you overcome barriers.

Limited Funds?

- Get prize drawing items donated by local vendors or by the charities that will benefit from employees' giving.
- Get food donations from local stores and restaurants.
- Solicit prizes or food from coworkers and managers (use of a beach house, fresh-baked cookies, etc.).
- Ask co-workers with hidden talents to donate a service or raffle item (flower arranging, gardening, guitar lessons, etc.).
- Use internal communication to advertise.
- Ask your CEO to send a letter, e-mail, or voice mail in support of employee giving. Draft the letter to make it even easier.

Limited Time?

- Set up a charity information table in a common area and leave it up throughout the employee giving period.
- Incorporate charity presentations into existing events or meetings.
- Ask EarthShare to set up an educational brown bag lunch where employees can learn about the work of member groups.
- Give employees an incentive when they pledge (casual day, candy, pins, ID lanyard, coupons, tickets for a prize drawing).
- Encourage departments to put on their own fundraising events.
- Use posters, fact sheets, flyers, and other marketing items to spread information about the charities.

Limited Support?

- Contact EarthShare before employee giving begins for planning help.
- Contact the human resources department, other department managers, or your CEO for support and endorsement.
- Encourage management to review employee giving materials in advance.
- Schedule a speaker from each of the funds and federations. Just call EarthShare to set up a presentation.
- Ask your coworkers for help, even for small jobs.
- At the end of employee giving, call EarthShare for help with tallying pledge cards and reporting.



3. Managing the momentum

The most successful employee engagement and giving programs are those in which events and fun attention-getters happen throughout the campaign, not just on the first day. Use the following ideas to increase your success with employee giving, and put the “fun” in “fundraising.” Remember, this is an opportunity for **employee engagement** in the community that will help retain employees and make the workplace a better place to be!



Holding an employee volunteer day during the campaign builds team spirit, publicizes the campaign, and serves the community.

Give incentives
Offer “casual day” certificates to people who pledge, or offer to let them buy more certificates for an additional donation to Earth Share. Many companies offer a “grand prize drawing” that anyone who pledges or responds is eligible to win.

Play games

E-mail eco-trivia questions (like those shown at right) to your coworkers. Those who e-mail back the correct answer that day could win a prize. Publicize the winners and add a note about EarthShare giving. EarthShare has lots of eco-trivia questions, so you don’t have to write or research your own.

Encourage giving competitions

Play to your co-workers’ sense of competition. Invite departments to challenge each other in total employee giving or percentage of employees giving, and then award a trophy or special honor to the winners.

(continued, next page)

Eco-trivia question samples

Q: A leaking water faucet can waste how many gallons of water per day?

A: 6-10 gallons

Q: If every American replaced one light bulb with an ENERGY STAR compact fluorescent light bulb, it would be like removing the greenhouse gases of how many cars?

A: 800,000 cars

Q: In Oregon, how far does our food travel (on average) to reach our plate?

A: 1,500 miles



Educate co-workers about giving

People are encouraged to give when they know the difference their donation can make. EarthShare and the other funds and federations can provide you with examples of the work our charities do and their accomplishments. In a newsletter or email, you may also want to give co-workers an example of what gifts of various amounts can fund.

Host a pizza lunch in which an EarthShare member group shares information about an environmental topic that might interest your coworkers. EarthShare member groups can speak to employees about topics such as recycling, recreational hiking, reducing pesticide use, and logging policies. Call your EarthShare representative to request a class from our Green Bag Series (list of sessions online at earthshare-oregon.org -- click on "Employee Engagement", then "Green Bags".)

Leverage management

Get the CEO or top executives involved in encouraging employee giving in a visible way. Ask if some or all of them want to volunteer to give a gift to an employee who wins a prize drawing. The gift can be something that costs the executive very little, like taking an afternoon to be the employee's "assistant," taking the employee out for lunch, or whatever your company's leaders are interested in doing. Showing top management support for the campaign boosts success.

Reward & celebrate

Handing out goodies to employees who give is an effective way to encourage more participation and keep the energy level high during the campaign. Think of instances in which you could reward your coworkers, and make it happen. Celebrate the act of giving. Award gifts to campaign helpers or to employees who come to campaign events.

Some ideas for gifts are:

- Items or services donated by coworkers, such as a home-cooked meal, artwork or pottery, plants, babysitting, oil changes, etc.
- Hiking (NW Forest Pass) or State Parks passes
- Public transportation tickets or bike shop gift certificates
- An afternoon of golf, tennis, or other sport with a trainer or pro
- Tickets to sporting events, movies, theater, concerts
- Pedometers, bike lights, other active transportation incentives
- Gym/health club memberships
- Gift certificates for restaurants, coffee, groceries, ice cream, etc.

What a donation buys

\$3.50 per pay period sponsors a child to attend a Nature Education and Awareness program.

\$4.17 per pay period saves 9,000 pounds of carbon dioxide greenhouse gases with the installation of 60 energy-efficient lightbulbs.

\$10.50 per paycheck will pay for a staff scientist to train 30 water-quality monitoring volunteers who regularly sample the Columbia River.

More examples are found on EarthShare Oregon's website, in "Our Impact" in the "About Us" section.



4. Report your success

At the official end of the employee giving period, tally the pledges and report the information to EarthShare and other participating charities. We recommend that you use a spreadsheet to organize your results.

Organizing your results helps you by:

- Documenting the success of your campaign
- Helping you set goals for future campaigns
- Informing employees about how much was pledged
- Helping you check that calculated totals match the pledge forms received, both for you and for the participating funds and federations

Sample Campaign Report

Non-Profits	2016 500 employees			2015 550 employees			
	Total \$	# Donors	% Giving	Total \$	# Donors	% Giving	% Change
Black United Fund	\$3,000	60	12%	\$3,500	70	13%	+17%
EarthShare	\$3,750	75	15%	\$4,500	90	15%	+20%
United Way	\$2,500	50	10%	\$3,000	60	11%	+20%
TOTALS	\$9,250	185	37%	\$11,000	220	39%	+19%

If you have a combined employee giving program (involving other funds or federations), calculate the total pledges for each fund and federation and the overall total. Be sure to include your company's matching dollars, if any.

You do not need to track designated contributions to specific agencies within EarthShare Oregon or other funds and federations. You may want to track donations for your company's departments or sites. Give a copy of your report, with copies of pledge cards, to participating federations.

Expect some late-arriving pledge forms. Just ask your EarthShare representative to come pick them up and don't forget to add the extra donations to your total.



5. Wrapping up

The wrapping-up phase ties up all the loose ends, spreads goodwill, and ensures that you will have cooperation for the next employee giving program.

Thank participants

Let employees know about the effect of their generosity and thank them in multiple ways: emails, web or company intranet postings, newsletters.

Thank your helpers

Personally thank all the people who helped you manage employee giving. You can send them a hand-written note, send a special e-mail noting that employee's contribution, give them a certificate, take them to lunch or breakfast, or give them a small gift donated by the funds or federations. Ask HR to include a letter praising those employees' service in personnel files.

Evaluate your activities

Hold an evaluation meeting with your committee and the funds and federations involved to see if there are any improvements that could be implemented for next year. Also consider suggestions from coworkers and share them with the representatives from the funds and federations.

Share the good news

Employees always want to know how much money was raised. Send an email to all employees with the total amount raised and other employee giving results. This is a great time to offer volunteer opportunities for those who want to take that next step in helping the community. If you and your company think it's newsworthy, you can also send out a press release about the campaign and your results.

Give yourself credit

Above all, pat yourself on the back! You have managed an important effort that will make a difference in your community and in the lives of your coworkers. You have made it possible for them to improve the health and environment of Oregon for themselves and future generations. Good work!

