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# WORKPLACE GIVING

YOUR BUSINESS CAN  
MAKE A DIFFERENCE TO  
YOUR COMMUNITY





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## What is workplace giving?

Workplace giving is a way for employees to make donations to community organisations directly from their payroll.

In a pre-tax workplace giving programme, the donation is made before tax is calculated on their pay, giving the employee the benefit of an immediate tax deduction without having to keep receipts.





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## What are the benefits?

### Business benefits:

- build business reputation and profile within the community;
- be seen as an 'employer of choice';
- demonstrate community spirit;
- build close relationships with community organisations; and
- contribute to staff morale and loyalty.

### Employee benefits:

- receive an immediate tax deduction without the need to keep receipts for tax purposes;
- donations come automatically from their weekly, fortnightly or monthly wage;
- make a donation decision privately—without pressure from fundraisers. It is up to the individual to decide if they wish to participate, how much they wish to donate and to which organisation;
- know that the donation is received at minimal cost by the community organisation—less money is spent on fundraising and more can be used for the actual cause;
- make an important contribution to the community; and
- make a connection with the community, which could lead to further opportunities to be involved with the community organisation through volunteering or social activities.

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## What are the benefits? *Continued*

### Community organisation benefits:

- receive regular, stable and on-going funding;
- receive donations as a lump sum reducing processing costs;
- potentially reduce expensive fundraising activities;
- access to a pool of potential volunteers;
- make business connections providing an opportunity to highlight their work;
- make community connections to grow the support base for their organisation and their work; and
- achieve greater community outcomes, do more 'good work' and help more people.



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## What is the Prime Minister's Community Business Partnership?

[The Prime Minister's Community Business Partnership](#) (the Partnership) is a group of prominent Australians from the community and business sectors, appointed by the Prime Minister to advise and assist the Government on issues concerning community business collaboration.

The Australian Government Department of Family and Community Services has developed this Workplace Giving Kit as an initiative of the Prime Minister's Community Business Partnership.



THE PRIME MINISTER'S  
COMMUNITY  
BUSINESS  
PARTNERSHIP

[www.partnerships.gov.au](http://www.partnerships.gov.au)

Visit the Partnership's website for more information.





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## How do I get started?

- Step 1** First you should make sure that there is support within your organisation for a giving programme—particularly within senior management. Senior management support is essential to ensuring the success and employee take-up of your programme. You might want to set up a meeting to discuss how workplace giving can benefit your business and staff members. You can request further copies of this Workplace Giving Kit to distribute to staff members by ringing **1800 050 009** and quoting reference number 1984, or by emailing [enquiry@workplacegivingaustralia.org.au](mailto:enquiry@workplacegivingaustralia.org.au)
- Step 2** Identify leaders in your organisation who may be able to assist you to champion the introduction of a workplace giving programme. It may be people who are formal leaders in the organisational structure—board members, managers, team leaders—or it may be leaders such as the president of the social club, enthusiastic staff members etc. Consider different approaches—formal minutes and proposals, or informal emails and discussion—to gauge the level of interest for workplace giving.
- Step 3** Once you have the support of senior management and key leaders it will be important to continue to keep them engaged as you roll out the initiative. Be clear about how you would like the leaders of your organisation to support this initiative eg. involvement in launching the programme, a quote endorsing the programme, championing the programme to their team members etc.
- Step 4** If there does seem to be interest in your organisation you can then consider the two main options for establishing a workplace giving programme—either an in-house programme (using internal resources to develop it), or use the services of an external advisory organisation, to assist you in the development of your programme.





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## Establishing a programme in-house

An in-house workplace giving programme is delivered through your existing payroll system, where your payroll is responsible for contacting and providing the donations directly to the not-for-profit organisations your staff choose to support.

The Australian Taxation Office's technical guide '[How to set up a Workplace Giving Program](#)' will provide you with the technical information on how to establish a giving programme in-house.

This CD ROM has specific templates to assist businesses that are [establishing an in-house workplace giving programme](#) including:

- the Australian Taxation Office's technical guide '[How to set up a Workplace Giving Program](#)';
- templates for employee pledge forms;
- example staff survey (to find out which community groups your staff would like to support);
- example email text to staff; and
- a draft employee flyer.

The CD ROM also includes specific templates for those businesses that want to [relaunch or promote an existing program](#):

- example email text to raise awareness of the programme;
- draft article to adapt for newsletters, intranet, bulletin board etc.; and
- staff survey to confirm/focus your existing programme on the right types of organisations.





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## Engaging an advisory organisation

The second option for developing a workplace giving programme (and one that is usually favoured by businesses with more than 200 employees) is to consider engaging an advisory organisation to assist you in establishing a programme. Advisory organisations can assist in developing, launching and managing workplace giving programmes, including managing the delivery of funding to community organisations, and the communication to your staff.

These organisations may operate on a fee for service basis. There are several established not-for-profit advisory organisations including;

[The Australian Charities Fund \(ACF\)](#), [Charities Aid Foundation \(CAF\)](#), and [United Way Community Funds of Australia](#) (or in Melbourne, [the Lord Mayors Charitable Fund](#)).



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## Engaging an advisory organisation Continued

### The Australian Charities Fund



Australian founded and led, The Australian Charities Fund assists employers with the development and implementation of workplace giving, and broader community investment programmes within large organisations.

Launched in January 2003, its mission is “to facilitate unprecedented levels of Australian giving”. As of January 2005, annual donation levels ran at \$5.4 million, supporting more than 130 charitable organisations in 12 different areas of social need.



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## Engaging an advisory organisation *Continued*

The Australian Charities Fund provides support to employers including programme design, employee surveys, community organisation selection, employee communication and ongoing programme management. Participating employers cover the cost of The Australian Charities Fund's services, ensuring that 100 per cent of employees' donations are received by the community organisations.

For more information on The Australian Charities Fund, visit [www.australiancharitiesfund.org.au](http://www.australiancharitiesfund.org.au) or phone (02) 9024 8630.



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## Engaging an advisory organisation Continued

### Charities Aid Foundation (CAF)



CAF Australia was launched in March 2000 to bring donors and the community sector together.

CAF offers complete workplace giving programme services to employers, employees and not-for-profit organisations. The outcomes benefit all parties involved so those in need receive the maximum impact.

Great success has been achieved. In just two years, CAF Australia has granted more than \$2.8 million from corporate payroll giving programmes to over 380 different causes.

For more information on CAF, visit [www.cafaustralia.org](http://www.cafaustralia.org) or phone (02) 9929 9633.



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## Engaging an advisory organisation *Continued*

### United Way Community Funds of Australia



**United Way**

Community Funds of Australia

*Your way to make a difference*

United Way Community Funds of Australia is a national network of independent community funds, which, for more than 80 years, have been helping those who are disadvantaged throughout Australia. Today the 10 United Way Community Funds of Australia distribute \$5.4 million annually to directly support grassroots activity in local communities.

United Way Community Funds of Australia helps companies develop, implement and sustain their workplace giving and other community engagement activities. Importantly these activities connect staff to the communities in which they live and work allowing them to experience the difference they are making. United Way Community Funds of Australia ensures each donation is invested wisely in the community by conducting regular community needs analysis, and due diligence on each community organisation to be supported by workplace giving.

For more information on United Way Community Funds of Australia, visit [www.unitedway.asn.au](http://www.unitedway.asn.au) or phone (02) 9299 5507.

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## Engaging an advisory organisation Continued

### Issues to consider

In deciding whether to use the services of an advisory organisation you may want to consider:

- how much staff time/resources can be dedicated to establishing an in-house programme?
- how much support will there be for a workplace giving programme from employees? (ie. will it be difficult to convince people, will there be a need for greater promotion, or are people already interested in workplace giving?)
- can your payroll system support the distribution of funds to many, or only a few community organisations?
- would your organisation support the engagement of an advisory organisation?



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## What does it cost to establish a workplace giving programme?

The cost of establishing a workplace giving programme usually depends on the size of your business, and the nature of the giving programme you want to establish, however generally it costs very little to establish workplace giving.

Administratively, once a programme is established it also isn't expensive to maintain, as it becomes a normal payroll function.

The non-administrative costs (such as the promotion of the programme to your staff) can often be managed within an existing area of your organisation already dealing with internal communications.

The main cost in establishing a workplace giving programme is the staff time required to consult with employees and manage the programme. Other costs may include fees from an advisory organisation if the programme is not in-house (some advisory organisations take a percent of the amounts donated, while others charge an administration fee).





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## Developing a shortlist of community organisations

### 1. The first option

There are three main approaches for deciding on community organisations to benefit from your business' workplace giving programme. The first option is to allow staff to choose which community organisation/s they want to support. Staff often prefer this option (as they are able to support which ever organisation/s they want to), however it can sometimes involve more work for your payroll staff (depending on what type of payroll system you have).

The only limitation is that to receive the tax deduction employees must ensure the organisation/s they wish to donate to has tax deductability status ie. DGR status [deductible gift recipient](#).

### 2. The second option

The second option involves developing a short list or panel of selected community organisations for your business to support through workplace giving. The most important step involved in shortlisting organisations is to find out which organisations your staff care about.

People may not join a workplace giving programme if they cannot donate to the causes they are interested in, but often employees will not know about community organisations that address these causes. It is recommended that you take the time to survey employees to find out about the causes they would like to donate, and the community organisations that they are interested in.

A sample survey template has been included on this CD for those establishing a new programme.

A second survey has been included for those with an existing programme to check back with your staff to see if they are happy with the organisations you are already supporting.

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## Developing a shortlist of community organisations Continued

Click here to access the [survey template for a new programme](#).

Click here to access the [survey template for an existing programme](#).

After the surveys have been completed an analysis of the responses should indicate which type of areas, or causes would be good to focus on for the shortlist. The next step is to find out specific organisations for consideration. [The Prime Minister's Community Business Partnership](#) website has a link to a database of not-for-profit organisations with deductible gift recipient status that is searchable by cause. Please note it is not a complete database of all organisations with DGR status, but might be a good place to start.

### 3. The third option

The third option is to offer a combination of the above, by providing a panel of community organisations for your staff to choose from, as well as allowing those who wish to donate to a different organisation the option to list it at the end of the pledge form. Again it is strongly recommended that the panel of community organisations to be developed in consultation with your staff through a survey, and that you check back with your staff after the initial survey to see if they are happy with the suggested organisations.

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## How can I check Deductible Gift Recipient (DGR) status?

### What is Deductible Gift Recipient status?

A Deductible Gift Recipient (DGR) is a charity or other organisation that is approved by the Australian Taxation Office as entitled to receive tax deductible donations. Not all charities are DGRs and a great variety of organisations, for example libraries, universities, etc, can be DGRs.

Once you know the name or Australian Business Number (ABN) of an organisation you are considering donating to, the DGR status can be checked on the [Australian Business Register \(ABR\)](#) website, or by ringing 1300 130 248.

It is the employer's responsibility for ensuring that participating community organisations have ongoing DGR status. Organisations that are listed on a database assessable through [www.partnerships.gov.au](http://www.partnerships.gov.au) database also have DGR status—please note this database is not a full list of all organisations with DGR status.





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## How long do employees have to commit to donate for?

The concept of workplace giving is that it is both a private and flexible way of donating. Employees need to know that the programme is voluntary and that they are able to change their donation to suit their circumstances.

However workplace giving usually caters for people who wish to make longer-term commitments to organisations rather than one-off donations, and a workplace giving programme may not be manageable if each employee wishes to alter the amounts they are donating each pay period.

Most organisations suggest employees commit to a minimum of 2 to 4 pay cycles for an individual donation. Annual donations need to total \$2 or over to be tax deductible.





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## How can I promote our programme?

Workplace giving promotion should be planned out to gain the maximum exposure, and hopefully the maximum number of employees who wish to participate in your programme. Communications may need to be tailored to cater for different business locations, senior management, call centres, retail sites etc.

Communication tools you may wish to use include:

- intranet advertising;
- staff newsletters;
- staff meetings where senior management have the opportunity to deliver the message and endorse the programme;
- staffroom notice boards;
- emails to staff;
- establishing team champions, informing them and asking them to take the messages back to their team;
- flyers on desks/chairs at strategic times of the year (tax time, coinciding with another business event, launch);
- screen savers, or login pop-up messages;
- payroll slips;
- information packs for new employees;
- information sessions; and
- presentations by the community groups supported in the programme.

As well as asking employees to sign on to workplace giving, communication also needs to keep people enthused.

Community organisations can often help in this regard by providing feedback about what they have achieved with the donations, newsletters, update emails or presentations to staff.

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## How can I promote our programme? *Continued*

As a manager of a workplace giving programme it is important to find ways to provide feedback and information to staff such as:

- the number of people who have joined the programme;
- the amount of money raised through workplace giving;
- which community organisations have been supported; and
- the community outcomes that have been achieved, (as specific as possible eg. hospital equipment purchased, youth camps funded, school books paid for, number of trees planted etc).

Most important of all is to ensure people receive a thank you for their donation. Some community organisations are able to send newsletters and information directly to your staff member (if your staff members are happy to be identified to the organisation). Other times the programme manager may be able to forward feedback to donors through newsletters and emails to thank them for their donation. It is important to ask staff if they are happy for their details to be passed on to the community organisations they support. Often they would prefer not to receive direct communication as this can include requests for additional funding and is produced at a cost to the community group.

Other communication considerations should include timing and frequency. It is important that staff are aware of the workplace giving programme and are encouraged to consider whether this is something they wish to participate in. However workplace giving is a voluntary programme and while it is an effective way to give, people shouldn't feel pressured to join.

It may also be beneficial to consider promoting workplace giving with other events such as:

- employee volunteering events;
- information fairs;
- business anniversaries;
- links to voluntary or other community business programmes; or
- new employee information.

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## How can I promote our programme? *Continued*

Keep monitoring your promotions to make sure that they are reaching their intended audience, and don't be too passive about promoting the programme—for example if you put information on the intranet, staff need to know that they can find it there.

Also keep in mind that the main motivation to participate in workplace giving is the end results for the community organisation and the community. Think about ways to promote the community organisations and their work, rather than just the giving programme itself.



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## Examples of business communications



Zurich (with assistance from United Way Community Funds of Australia) has developed a simple flyer which includes their pledge form and provides their employees with information on their workplace giving programme, 'Community Connections'.



Mallesons Stephen Jaques (with assistance from Australian Charities Fund), promote their workplace giving programme to their employees in a number of ways, including asking their staff to consider donating the equivalent of a cup of coffee a week to a community organisation through workplace giving.

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## Examples of business communications Continued



Ernst & Young (with assistance from CAF Australia) provide practical examples of the difference their employees can make through workplace giving, including having their donation matched dollar for dollar.

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## What is employer matching?

Some employers choose to support workplace giving in their organisation by offering to match employee donations.

This type of support often increases the take-up of workplace giving as there is an added incentive for employees to donate. Staff realise that by donating one dollar, the organisation receives two—effectively doubling the amount of 'good' that can be done in the community.

Employers should carefully consider the concept of matching donations. It may be more appropriate for an employer to make a one-off donation to a community group, or to limit the amount available for matched giving.

It is also something that may need to be discussed with the company board or shareholders.





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## Where can I go for more help?

The Australian Government Department of Family and Community Services has funded a Workplace Giving Support Programme to accompany this kit and make the process of developing a workplace giving programme even easier. The support programme has been developed as a collaboration between the [Prime Minister's Community Business Partnership](#), the [Australian Charities Fund \(ACF\)](#), [Charities Aid Foundation \(CAF\)](#), and [United Way Community Funds of Australia](#). The support program provides access to free resources such as workshops, fact sheets, website resources, and an email advisory service.

## Website

The Prime Minister's Community Business Partnership website has workplace giving fact sheets, workshop details, registration forms and other useful information. Visit [www.partnerships.gov.au](http://www.partnerships.gov.au)

## Workshops

Free workplace giving workshops are being provided in a number of locations around Australia during 2005–06. To find out more about the workshop schedule and programme please visit [www.partnerships.gov.au](http://www.partnerships.gov.au)

## Email Support

If you have a specific question on implementing or relaunching a programme, the business case, where to get started, choosing community organisations or any other workplace giving issues, you can email the free workplace giving advisory service at [enquiry@workplacegivingaustralia.org.au](mailto:enquiry@workplacegivingaustralia.org.au)





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Workplace giving templates

## Workplace giving templates

### Employee Flyer

An employee flyer has been developed for you to communicate important information about workplace giving to your staff. The flyer is in a template form so that you can add your business logo and specific information on who they should contact in your organisation for more information.

#### Employee flyer template

### Pledge Forms

Two pledge form templates have been included on this CD ROM. The first is for programmes that offer staff an open choice for which organisation they want to support.

#### Open choice pledge form

The second is for programmes that have a panel of community organisations pre selected for staff to support (see staff surveys for choosing the organisations).

#### Pledge form with a panel of organisations

Your business may want to customise the above templates to offer a combination of a panel and open choice.

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## Workplace giving templates Continued

### Templates for setting up a new programme

If you are developing a new workplace giving programme you may wish to use these templates. They are able to be modified and changed to suit your needs.

[Staff survey template for a new programme](#)

[Draft article template for a new programme](#)

[Draft staff email template for a new programme](#)

### Templates for reinvigorating an existing programme

These templates have been developed for those organisations who may already have a workplace giving programme in place, but would like to work to raise awareness, increase participation, or check that the programme supports the organisations your staff care about.

[Staff survey template for an existing programme](#)

[Draft article template for an existing programme](#)

[Draft staff email template for an existing programme](#)

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