



Fundraising Toolkit

How to raise funds and sustain a successful employee relief program

Whether you're launching a new program or looking to raise money for a well-established fund, peer-to-peer fundraising is an excellent way for your workforce to engage and connect with one another from down the hall or across the globe.

Through tax-deductible contributions, your employees have the opportunity to create positive and direct impact for their colleagues when disaster or hardship strikes. This type of support is invaluable for both those who give and those who receive the funds, creating a sense of belonging with each other, and within the organization.

So, how do you educate your employees about your new program?
What is the best way to encourage your employees to give?

Giving is a Growing Trend



In a (nearly) post-pandemic world, creating a culture of philanthropy proves to be good for people and good for business. Giving USA recently reported that

Americans gave \$471.4B to charity in 2020—a 5.1% rise over 2019.

It is significant to note that 69% of dollars contributed was from individuals and 4% from corporations. Many of your employees are already active donors to causes that matter to them, so how do you put the opportunity for them to contribute to their employee relief program in their options for consideration?

In 2022, total giving is **anticipated to rise 5.7 percent**. Corporations are expected to increase their donations in the next year. While foundations are expected to see a decline in giving in 2021, a **large spike (8.8%) is projected in 2022**. There is also a potential to see an increase in foundation growth in the tech world and among younger companies.

Now let's look at some of the generational trends in giving. Millennials, a large portion of today's workforce, are more likely to see giving as a part of their identity, but are less likely to trust organizational charities; they want to be actively engaged in the direction and use of their financial support. An employee relief program can provide that direct interaction they are searching for by keeping the funds handled and distributed within the company so they can see the direct impact.



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Millennials

26%

of U.S. population

11%

of total U.S. giving

Most are at early stages
in their careers or still in school

\$1,000

estimated median
charitable giving

56%

say their giving is
more **spontaneous**

Millennials are more
likely to say they give to make
a meaningful difference

Baby Boomers

23%

of U.S. population

43%

of total U.S. giving

Most are approaching
or in retirement

\$2,000

estimated median
charitable giving

72%

say their giving is
more **planned**

Boomers are more likely to say giving
is part of their values or that the cause or
organization is important to them

Employee relief programs can be a powerful tool
for creating employee engagement, connection,
and a sense of loyalty, as studies have also shown
that millennials and upcoming generations are more
interested in working at a responsible company that
cares about employee well-being.

Reasons for Giving

Understanding what drives employees
to give can help you structure your
communications and outreach around
employee relief in a way that generates
maximum impact for your program and,
ultimately, your people.

One study found that 96% of people who gave
to charity did so based on a **sense of morality
and ethics**, a desire to give back to society and
tackle inequality, using their own good fortune
to help others. The same survey revealed that
75% of donors gave because they believed in a
specific cause that they could support through
the charity.

Faith and religion drove 71% of people to
give while 61% said they gave due to **personal
experience** ranging from having directly
experienced the hardships of the developing
world, to suffering a loss of a family member
who battled a disease.

With this in mind, we have designed this guide to
help you introduce and implement a successful,
support-powered program for your workforce.

*"I give because of our CEO.
He champions so many programs,
but this one is dear to my heart.
My company is my work family.
If they struggle, I know there will be
assistance to help them."*

- Cynthia B., Donor



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Workplace Giving Tips



Establish the Basics

Peer-to-peer fundraising has been steadily gaining traction globally; however, for many individuals, this may be their first experience with it. As with any new system or process that you introduce to your workforce, it is best to keep things simple to increase the likelihood of adoption.

- ▶ **Implement easy-to-find, one-click paths to your donation page.** The more work it takes to get to the page, the less likely employees may be to donate.
- ▶ **Introduce payroll deductions to make giving effortless and sustainable.** Payroll deductions mean easier giving and are 5X more valuable to than one-time donations. By offering employees an option of having a percentage or flat amount taken directly from their paychecks, you provide an effortless way to give that takes no time out of an individual's day-to-day.
- ▶ **Make giving a part of your onboarding process.** Orientation is a perfect opportunity to build awareness around your employee relief program. Walking through the details of your program, including the concept, process and giving options, offers newcomers a chance to ask questions, understand its value, and set up donations from the start.
- ▶ **Make donating part of your business continuity planning efforts.** A key component to a business continuity plan is a disaster recovery plan. Establish a process surrounding communications language and cadence to be sent out in the event of disaster. This is an opportunity to inform your employees of the opportunity to directly help colleagues who are not able to work because of the situation at hand.
- ▶ **Offer PTO conversion.** Your payroll department or a third-party vendor, like our [partner PTO Exchange](#), can assist you with converting unused PTO dollars into a tax-deductible gift, ensuring unused leave never goes to waste.
- ▶ **Consider providing company matching, either year-round or during big news events, such as natural disasters.** Choosing to have the company give *with* your employees creates a sense of camaraderie. According to a recent workplace giving survey, 84% of donors are more likely to donate if a match is offered. It allows the company to lead by example, and of course, generate more overall dollars, leading to the biggest possible impact.



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Communicate about your program regularly

Communication is the key to all relationships. Remind your employees regularly that they have an easy way to make an impact, be open about how their donations provide direct support for basic life necessities, and be thorough with clear instructions on how to give.

► **Release an official announcement about the program, its purpose and how it works.** For individuals to be inspired to donate, they must first understand the program at large. Creating initial awareness and an open line of communication for questions can make all the difference when it comes to adoption. A lot of contributions aren't made because no one makes the direct ask! At the end of this document, please find three templates to aid in announcing your program.

► **Talk candidly about the impact of employee donations to colleagues.** Disaster or hardship can strike at any time. Nearly everyone has been through or has heard of someone who has been through a tough time. Discussing what types of events qualify for the relief fund helps humanize the need for programs like these. [Click here to share any of E4E Relief Impact data.](#)

► **Share impact stories to solidify how employees' dollars equate to big changes in real lives.** As your program grows, collect stories from impacted employees *and* from employees who have contributed to the program (your new Fund Advisor Dashboard makes it easy to identify employees willing to share!). These testimonials are powerful for everyone: for those who have donated, those who are considering it, and those who have been impacted by disaster or hardship. Testimonials will remind everyone in the company that this is more than just a place of business, it's a community of connected individuals who care about one another's well-being. While you're building your bank of internal testimonials, you can share some successes we have collected over the years. Find sample donor testimonials [here](#) and sample impacted employee testimonials [here](#).



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Ensure executive awareness and buy-in

The C-suite can be an excellent source of support for an employee relief program. When company leaders invest their time in learning about a new initiative and gather the impact stories, there is an organic “word of mouth” to the rest of their peers and team. Their buy-in can make all the difference in encouraging employees to learn more, ask questions and participate.

- ▶ **Ensure your leaders are aware of funding options beyond cash.** We can help you convert a wide range of assets to power your relief efforts. Options include publicly traded securities, mutual fund shares, life insurance policies, real property and closely held business interests. Our parent organization, Foundation For The Carolinas, has extensive experience working with donors to make an impact through gifts of illiquid assets. For more information, contact your Relationship Manager.
- ▶ **High-level awareness of the program will trickle down and encourage employees to give.** In short, people may feel more inclined to give if they see their managers doing so. It will instill a feeling of community from top-to-bottom.
- ▶ **Encourage your senior leaders to talk about the concept of employee relief and why it matters to the company as a whole.** If the higher-ups are making it clear that employee relief is a necessary, important, worthwhile cause, the rest of the company will take note. It will provide an added boost if the message connects leadership to employee well-being during times of crisis.
- ▶ **Make an employee relief update part of quarterly or other regular briefings so that it's always top of mind.** Regularly discussing program updates, successes and opportunities keeps the program top of mind throughout the organization. This is also important since the company is ever-changing; promotions, new hires and departmental restructuring are a regular part of business.
- ▶ **Consider Board and C-suite pay donations, or foregoing some portion of executive salaries.** Company leaders choosing to share their own income with employees has been a growing trend. One popular example is the CEO and Board of Hyatt Hotels and Resorts who chose to [give up part of their salaries during the COVID-19 crisis to support their staff.](#)



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Establish campaign champions

Find the advocates for your program. Whether it's an employee who has been impacted or simply someone who sees the value in it from day one, these individuals will generate buzz and excitement.

- ▶ **Campaign champions are passionate about the program and can galvanize others to feel the same.** This is the same as finding the best person for any other position in the office. Passion is the most effective way to gain support, and people will be more likely to get involved if the word is coming from someone who truly cares.
- ▶ **Look for established internal groups:** Engage your Employee Resource Groups to serve as champions and cascade information through those established internal networks. Consider Alumni or Retiree networks for past employees who feel connected to your company.
- ▶ **Previous grantees make powerful campaign champions, so encourage them to get involved.** These individuals know firsthand how much of a difference the program can make. Hearing from those who have been directly impacted will send a much more powerful and emotional message that will drive donations.
- ▶ **Empower your campaign champions to find new ways to talk about employee relief.** Encourage creative conversation to find exciting and interesting ways to spread information. Find resources on our website about employee relief to inspire ideas and new avenues.



Be creative

Giving can be fun! Implementing interactive and engaging aspects to the process can build team spirit and make donating feel exciting.

- ▶ **Introduce interdepartmental competitions based on participation and/or dollars raised.** By making giving a game, it can ignite the competitive spirit of individuals, teams and departments that results in more giving overall. It creates an opportunity for deeper bonding between colleagues and networking amongst employees who may not interact regularly through their positions.
- ▶ **Hold giving lotteries where those who donate become eligible to win a prize.** Who doesn't love a raffle? The opportunity to win will be added motivation, especially for first-time donors who may not have given otherwise.
- ▶ **Highlight donors on company social pages or intranet.** Giving to help those who have fallen on hard times is a noble act, and acts of goodwill deserve praise. Getting the word out will help donors feel more appreciated and will motivate those who have not donated yet.
- ▶ **Participate in high-publicity fundraising days such as Giving Tuesday.** Employees will be more encouraged to get involved when the company dedicates a specific day(s) to focus on the cause. These fundraising days will also keep your employee relief fund prioritized and top of mind. For your company, it doesn't have to be a day – you can create a time during the workday, a month or otherwise to see what works best!



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Executive Fundraising Communication Template

Dear fellow leaders of [Company Name],

I'm pleased to share that we have officially established an Employee Relief Fund for [Company Name] to provide charitable grants to colleagues during times of disaster or hardship (edit for program). We recognize the important opportunity as a company to respond compassionately to crisis in the lives of our colleagues. To administer this program, we have partnered with E4E Relief, a 501c3 public charity which has two decades of experience serving as the national leader on efficient, sustainable employee relief programs.

We will officially launch the [Program Name] on [Insert Date], at which time more details will be provided to all staff on program parameters. For now, I'm requesting your support in seeding the first donations to get our fund off the ground. The company has made an initial donation of \$[###,###], and we would like to formally challenge you all to raise an additional \$[###,###]. No one is obligated, but as leaders of this great company, this is a powerful way we can all help the [Company Name] family and provide some much-needed peace of mind for our colleagues during times of uncertainty. Any amount will make a difference.

How to donate:

The donation portal is live here: [Insert Link]. You may donate via credit card on the donation portal, or, in the event you would like to make a stock donation, wire money or directly speak with a donation expert – you can reach out to E4E Relief Donor Services at 704-973-4564 or donorservices@e4erelief.org.

How it will help:

Donations received for the [Program Name] fund will go towards future grants to our fellow employees who experience an unanticipated hardship such as [Insert examples] from your program (ex. large scale disaster, spouse losing their job unexpectedly, house fire or illness).

The fund, administered by a third party to ensure both confidentiality and equity in distributions, will provide financial assistance to [Company Employees] (provide specific employee info such as full-time, part-time, on approved leave, etc, as applicable), who are experiencing a financial hardship resulting from an emergency, hardship or disaster, including support for [provide specific examples based upon program].

Thank you for your continued leadership and support. [Insert name of company contact] will be helping lead this effort for our organization. Please let [insert name and contact info] or me know if you have any questions.

Let's rise to this occasion together.



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Peer-to-Peer Fundraising Communication Template

Dear [Colleague],

Hopefully you've seen the recent announcements about the launch of [Program Name] to provide charitable grants to colleagues during times of disaster or hardship (edit for program). I wanted to share why I think this program is important and encourage you to join me in making a donation to the fund.

Life can be full of difficult and unexpected events. We never know when misfortune will come our way. For me, being part of [Company Name] is like being part of an extended family. [Program Name] exists to help the [Company Name] family by providing some much-needed peace of mind for our colleagues when they are affected by disaster or hardship.

The fund, administered by a third party to ensure both confidentiality and equity in distributions, will provide grants to [Company Employees] (provide specific employee info such as full-time, part-time, on approved leave, etc, as applicable) who are experiencing a financial challenge resulting from an emergency, hardship or disaster, including support for [provide specific examples based upon program (ex. large scale disaster, spouse losing their job unexpectedly, house fire or illness)].

Donations are voluntary and tax-deductible, and any amount will make a difference. [Company Name] is covering the administrative cost of the program, ensuring the dollars you and I donate will go directly to support basic necessities for our fellow employees.

You can find more information about how to donate [insert link or reference]. I've elected to have (\$10) contributed from each paycheck. It's not much, but it will add up over time, and I feel privileged to have a chance to support this worthy cause. I hope you will join me in making a donation.

Thanks for your consideration, and feel free to reach out to (fund advisor) if you have any other questions about our relief program.



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Donations Follow-up Template

As our organization looks for ways to keep employees engaged and provide a rapid response to disaster and hardships, employees can make a contribution to the relief fund that will go directly towards helping their colleagues meet basic needs in crisis. Donating to the fund is voluntary and no amount is too small. The fund's success and ongoing sustainability will rely on employee generosity. [Company Name] is covering the administrative cost of the program, ensuring dollars donated by employees go directly to support fellow employees. Employees are able to donate via payroll deduction, credit card, check, or stock. All donations will be matched by [Company] (if applicable). You can make a credit card donation by visiting [insert program URL].



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