# Congratulations on launching your Workplace Giving benefit




Today, you're showing your employees that you appreciate the ways they make a difference in their communities and around the world. And you want to help them in their efforts—however you can.

This document provides you with the information and resources to help launch and promote your Workplace Giving benefit to your employees.

## Step 1: Create key audiences

Identify your key audiences, their needs, and the desired outcome for each.

| AUDIENCE | OUTCOME |
|---|---|
| **Managers/senior leadership** | Use the Workplace Giving benefit as another way to increase employee engagement and recruiting. |
| **All employees** | View the Workplace Giving benefit as another way the company is committed to creating a culture of giving within the workplace. |
| **Industry** (prospective employees, media, trade groups) | Increase the perception that your company is a leader in its industry because it offers such a unique and modern benefit. |

## Step 2: Create key messages

The Workplace Giving benefit messaging you share with your employees should convey that giving is important to the organization and can help promote the mental health and wellbeing of your employees.
Key messages include:

- The well-being of our employees is important to us
- We put our company's values front and center and find new ways to connect with employees
- We understand employees value opportunities where they can give back at work
- Offering the Workplace Giving benefit is one way to increase team building and foster positive working relationships with coworkers

## Step 3: Create key communications and timeline

To promote the Workplace Giving benefit, we recommend using the following five phases:

**Pre-launch —** Let employees know that you're adding a new benefit.

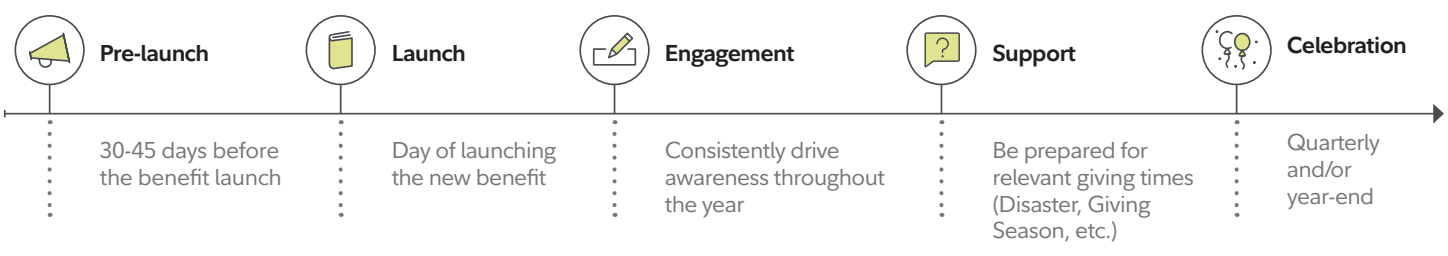
**Launch —** Introduce the new benefit and explain how it works.

**Engagement —** Increase awareness of your giving program throughout the year.

**Support —** Help employees see the importance of giving at relevant times.

**Celebration —** Recognize and celebrate how much your employees' donating and/or volunteering efforts have made a difference.

The timeline you follow to roll out your Workplace Giving Benefit should follow a schedule that provides the right resources for your employees at the right time. As an example, your roll out schedule could look like this:




## Step 4: Create content

To help make sure that your Workplace Giving benefit can be successful, Fidelity has created templated communications to inform and promote your program to employees. You can use the provided language or make copy adjustments based on the key messages outlined in this document if necessary.

PRE-LAUNCH[2] – let your employees know that you'll soon be adding this great new benefit*

| Key Points | Communications |
|---|---|
| • Announce your decision to add a workplace giving benefit and your commitment to creating a corporate culture of giving<br>• Generate excitement amongst your employees | • Email Message<br>• Digital Signage/PowerPoint Slide<br>• Newsletter/Social Media content |

*Can be sent 30-45 days prior to launch

LAUNCH[2] – Get ready for a new way to give**

| Key Points | Communications |
|---|---|
| • Promote the launch of your new workplace giving benefit<br>• Employees can choose from more than 1M vetted charities to support<br>• Show employees how easy it is to use the Workplace Giving benefit with video tutorials | • Email Message<br>• Digital Signage/PowerPoint<br>• Newsletter/Social Media content<br>• Employee Video Tutorials – Managing your Profile, Make a Donation and Volunteering (Includes email to promote tutorials) |

** Can be sent day of launch

ENGAGEMENT[2] – Increase engagement of your giving program

| Key Points | Communications |
|---|---|
| **Monthly Thematic Giving** - create a culture of giving with monthly donating/volunteering themes | • Thematic email messages<br>• Digital Signage/PowerPoint Slide<br>• Newsletter/Social Media content<br>• Monthly Giving Calendar (includes suggested charities for each theme) |
| **Year-round engagement** - Reinforce giving and/or volunteering throughout the year | • Volunteering Toolkit* (including virtual)<br>• Thematic Giving Toolkit*<br>• Volunteer Grant Toolkit* (includes an employee flyer) |
| **Promotional Materials** - Remind employees of the availability of your workplace giving program at a benefits fair or during open-enrollment | • Email Message<br>• Digital Signage/PowerPoint Slide<br>• Employee Flyer |

*Toolkit includes email, digital signage/powerpoint slide, and newsletter/social content

SUPPORT[2] – Promote giving at relevant times during the year

| Key Points | Communications |
|---|---|
| **Disaster Relief** - Help make it easier for employees to support events and causes during times when help is most needed. | • Email Message<br>• Digital Signage/PowerPoint Slide<br>• Newsletter/Social Media Content |
| **Giving Season** - Offer support during the most charitable times of the year | • Email Message<br>• Digital Signage/PowerPoint Slide<br>• Newsletter/Social Media Content |

CELEBRATE[2] – Recognize and celebrate how much your employees' donating and/or volunteering efforts have made a difference

| Key Points | Communications |
|---|---|
| Celebration Materials – Show how much your company has made an impact<br>Your commitment to giving back to others | • Email Message<br>• Digital Signage/PowerPoint Slide<br>• Newsletter/Social Media Content |

**GIVING MADE EASY**

The NetBenefits® app is a convenient way for your employees to make donations. They can scan a QR code or text the word "DONATE" to 343-898.



## Visit the Fidelity Plan Sponsor WebStation® (PSW®) employer portal

The information and resources to assist you to effectively communicate and launch the Workplace Giving benefit, including the materials highlighted or notated above, are available on the **Workplace Giving section of PSW**. Visit now or contact your Fidelity representative with any questions.

[2]Content available on the Plan Sponsor Webstation.
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