

WORKPLACE GIVING

Encouraging employee engagement

Fidelity has helped many companies boost employee engagement through workplace giving programs. Whether you're just starting out or have a long-standing and successful program, we are here to help you. Our team can help streamline your administrative tasks while supporting the design of impactful programs. Below are some tips for keeping employees engaged and enthusiastic about your programs.

Match your employees' donations

By matching employee donations, you not only give your employees a reason to support charities, but also a reason to utilize the Fidelity Workplace Giving platform. Even a low match—perhaps $.50 provided by you for every $1 an employee donates—provides motivation. You can set a custom match amount, annual employee match cap, and overall budget cap easily on the platform.

Support a broad range of nonprofits

Several research studies have shown that the best-utilized workplace matching programs match donations to any nonprofits that their employees support. This allows employees to feel that you're helping make an impact on causes that matter to them. (Of course, the Workplace Giving platform always allows your company to reject any matches you do not wish to make.)

Pay fees so employees don't have to

Most companies that use Fidelity Workplace Giving cover the 1% platform fee on match-eligible donations. Your employees also have the option to cover their own credit/debit card or ACH fee for the nonprofit they're supporting. By covering the platform fee, you enable your employees to give more to the causes they care about.

Create campaigns

Plan giving campaigns focused on a particular issue, area or theme—Black History Month, Mental Health Awareness Month, etc.—and get creative! Consider increasing your match rate during these campaigns to boost participation. You can also spark friendly competition by inviting a few engaged employees to nominate three to five nonprofits. Encourage others to donate to these organizations over a set period, and at the end, make a larger company donation to the nonprofit that receives the most support.

Offer options

Not all employees are able to financially support the causes they care about, but many can volunteer their time or skills. Offering options to employees who volunteer is a great way to encourage engagement. Fidelity Workplace Giving makes it easy for you to manage volunteer programs, including "Volunteer Grants," where a company donates to a nonprofit in recognition of employees' volunteer service.

Campaign success

Consider both proactive and reactive campaigns. For instance, you may run a campaign with a special 2:1 match for big moments like Giving Tuesday or a special anniversary year at your company. When planning your annual budget, don't forget to leave room to support campaigns in response to disasters as we know many employees wish to provide relief. Successful campaigns typically have:

- Robust promotional communications (ex: emails, intranet posts, Zoom backgrounds, etc.)
- Support from senior leaders
- A goal to strive for!



You and your employees make an impact. We make it easy to do so.
Contact your Fidelity Managing Director for more information.

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