

## DIY Tool: Project Plan

Implementation Step	Due by	Notes
<b>GET SET-UP</b>		
<ul style="list-style-type: none"> <li>Identify a program co-ordinator</li> </ul>		
<ul style="list-style-type: none"> <li>Brief and engage the leadership team</li> </ul>		Organise a meeting with leaders and share the business case ( <a href="#">download</a> ) for establishing workplace giving and the key steps for program launch and growth
<ul style="list-style-type: none"> <li>Decide matching policy</li> </ul>		<a href="#">Download</a> matching options
<ul style="list-style-type: none"> <li>Set a program target</li> </ul>		Aim for 30-50% staff participation
<b>Choosing charities</b>		
<ul style="list-style-type: none"> <li>Survey your employees</li> </ul>		<a href="#">Download</a> survey template to identify the causes/charities they care about
<ul style="list-style-type: none"> <li>Choose your charity partner(s)</li> </ul>		<a href="#">Download</a> charity selection template. Use charity search function on Our Community's website: <a href="http://www.ourcommunity.com.au">www.ourcommunity.com.au</a>
<b>Action payroll requirements</b>		
<ul style="list-style-type: none"> <li>Set up payroll requirements</li> </ul>		Discuss payroll set up and sign up process. <a href="#">Download</a> the payroll processing roadmap and donation form.
<ul style="list-style-type: none"> <li>Provide charity bank account details to Payroll</li> </ul>		Ask each charity for ABN, bank account, key contact and financial contact details

<b>PROMOTE</b>		
<b>Develop marketing collateral</b>		
<ul style="list-style-type: none"> <li>Develop promotional materials</li> </ul>		Download <a href="#">brochure</a> , <a href="#">donation form</a> , <a href="#">posters</a> , <a href="#">FAQs</a> , intranet content
<b>Launch the program</b>		
<ul style="list-style-type: none"> <li>Develop launch plans</li> </ul>		Involve CEO/leaders in launch event. Set date, time, venue. Invite staff and charity partner(s) Ask your Champions to help co-ordinate the launch
<ul style="list-style-type: none"> <li>Distribute marketing material</li> </ul>		Display posters/banners, launch intranet, desk drop brochures/donation form, email signature, videos/animations, collective giving banners
<ul style="list-style-type: none"> <li>Hold launch event</li> </ul>		Consider involving charity partners in the event
<ul style="list-style-type: none"> <li>Begin employee workplace giving deductions</li> </ul>		
<ul style="list-style-type: none"> <li>Communicate results to employees</li> </ul>		Thank donors for their sign-up and re-distribute donation form to all staff
<b>Grow the program</b>		
<ul style="list-style-type: none"> <li>Include workplace giving into the recruitment and induction process</li> </ul>		
<ul style="list-style-type: none"> <li>Introduce opt-out for new staff</li> </ul>		For more information on opt-out, go to WGA's website
<ul style="list-style-type: none"> <li>Develop a plan to promote the program</li> </ul>		Share donation impact. Use charity feedback brief Get involved in Workplace Giving Month (June). For inspiration, visit <a href="http://www.1Mdonors.org.au">www.1Mdonors.org.au</a> Include other opportunities to support charity partners - workplace fundraising events, volunteering, ways you can share professional expertise or provide in-kind support