



# PRESGiving

Employee Charitable Campaign

# ACTION

GUIDE



IT



STARTS



WITH



US

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# WE'RE GLAD YOU'RE HERE

## Dear Captain,

As the Individual Giving Director, I would like to extend my heartfelt gratitude for your commitment to PRESGiving. YOU have joined forces with the organization that is consistently making an impact in our shared communities, but we couldn't do this without **YOU!**

You and your team are about to embark upon a journey that will change your life. It is rare that a person has the ability to see the impact and make a difference in the lives of so many in their community.

Enjoy the experience, embrace it and celebrate every success with your fellow Captains and team!

The funds you help raise on behalf of Presbyterian Healthcare Foundation and United Way will fund the programs that are changing lives right here, in our community and state every day.

Thank you again for joining us, now let's do this!

Sincerely,  
*Nyra Klauer*

Nyra Klauer  
Presbyterian  
Healthcare Foundation

# What is PRESGiving?

## Elevator Speech

Our incredible employees are generous and determined people who are passionate about addressing the needs in our communities and improving the lives of those we touch every day.

From the start, our community has been the core of who we are and what we do. Presbyterian was built on a foundation of giving more than 100 years ago. Many of the programs and services that exist today were made possible by donor support.

“It starts with us” is the motto for our PRESGiving Employee Charitable Campaign and by making a personal contribution together with more than 3,800 other employees, you are committing to making progress a priority.



### **PRO TIP**

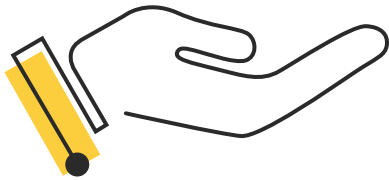
Focus on the impact that can be made when we all give!

# A LOOK AT 2022 SO FAR

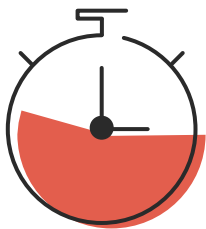
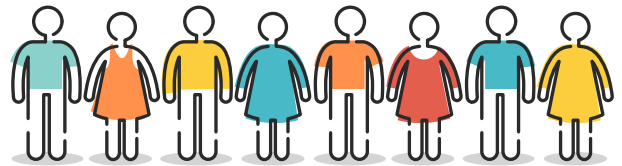
OVER

**\$2.4m**

contributed by employees across  
the communities we serve



**3,810** employee donors



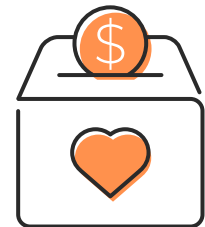
**5,161**

PTO hours donated

MORE THAN

**570**

funds supported



WHEN ASKED WHY THEY PARTICIPATE

# OUR CAPTAINS SAID:



**“Having a culture of compassion and generosity is vital in making a positive impact.”**

*– Janelle*

**“I love that we have the ability to help others we may have never met. Joining together for an amazing cause.”**

*– Amanda*

**“If something I can do makes a difference for someone else – then it's worth doing.”**

*– Marlynda*

**“I believe it's time to give back some of what has been so freely given to us. I know I'm not the only one, and believe more would find this endeavor rewarding once they learn what it's about.”**

*– Leo*



# HERE

## is where you come in



### Changemaker.

It's a powerful word, and most of us wouldn't describe ourselves that way. But what if that's exactly, by its definition, who you are? By joining this special five-week PRESGiving Campaign you've signed up to make a change. As a PRESGiving Captain, you've committed to lead the charge, to be an example of what change can look like through work and impact in our shared community and in turn, in New Mexico! YOU ARE A CHANGEMAKER, and we are so grateful for your support and service!

Change in our community starts with employees like YOU, looking for ways to give back and make our shared community stronger and healthier. By coming together to uplift others we will make an impact and that's where change happens.

While PRESGiving is a year-round campaign, Presbyterian Healthcare Foundation

(PHF) partners with United Way of Central New Mexico (UWCNM) each fall to bring our employees together on a mission committed to offering a wide spectrum of giving opportunities within Presbyterian and out in our communities through UWCNM.

Employees make direct donations to any not-for-profit organizations whether it's Presbyterian or a United Way beneficiary. Those who give play a big part in lifting up families who desperately need resources, supporting our smallest patients through big, life obstacles and assisting our colleagues and care teams when they need it most.

We'll share updates and impact stories about how your donation has been put to use, knowing that 100% of your tax-deductible gift is directed toward improving the health and lives of fellow New Mexicans.



### PRO TIP

Tell a story, ask for a story. Maybe you have one of your own, or maybe your co-workers do, too. The key is to engage in a way that feels right for you.



# WAYS TO MAKE A DONATION



## PresSource

Visit [PresSource](#) >  
[My Benefits](#) > [Charitable Giving](#).

Payroll deduction gifts  
are effective immediately.



## Online Giving

Visit [PRESGiving.com](#) or  
search [PRESGiving](#) on  
[PresNet](#) and fill out the form.

These gifts are effective  
the first pay period of 2023.



## By Mail

Return the pre-campaign  
mailing form each employee  
received in the mail.

These gifts are effective  
the first pay period of 2023.

# GIVING OPTIONS

# EXPLAINED

Donors can choose to fulfill their pledge with either payroll deduction or PTO.

## PTO

When a donor chooses PTO hours as the donation method, the number of hours pledged (in 2022) will be deducted in one lump sum from the donor's PTO balance in September 2023.

When you donate your PTO, you have the opportunity to direct your support to one or a combination of four Presbyterian programs:

- Patient Assistance
- Clinical and Nursing Education
- Area of Greatest Need
- LCMC Unrestricted Fund

If you choose multiple programs, hours will be distributed equally across the funds you've selected.

For more information on PTO gifts, view page 16.

## Donations through Presbyterian Healthcare Foundation (PHF)

If you choose to support Presbyterian's work of improving the health and lives of New Mexico families by donating through PHF, you may do so directly and 100% of your gift will benefit the area of work you are most passionate about.

## Donations through United Way of Central New Mexico (UWCNM)

You can choose to support United Way directly and help fulfill their mission of bringing people and resources together to improve lives and strengthen our communities. If you donate to an outside not-for-profit organization through United Way, 10 percent of your total donation (up to \$1,000) will be invested in the UWCNM's Community Fund. This fund focuses on improving and empowering New Mexico's residents through education, health, basic needs, and financial stability. All gifts less than \$24 will be invested in this fund.

## Legacy Giving

Many people like to leave a gift to a charity in their will, trust or by beneficiary designation. Have you considered making a gift to benefit future generations? Contact Rick Scott at [rscott4@phs.org](mailto:rscott4@phs.org) or (505)724-7509.



### PRO TIP

Emphasize past campaign success. Last year our PRESGiving employee donors contributed \$2.45 million!

# LET'S GET STARTED!

- Become familiar with the campaign by visiting **PRESGiving.com**.
- Update your **email signature** to include the captain badge accessible from the virtual toolkit.
- Schedule a **10-min talk** for your team meetings during an existing meeting or by scheduling a special time.
- Send an email about **CAMPAIGN KICK-OFF** to your department using the invitation flyer in your toolkit.
- **Review weekly e-newsletters** for campaign progress, reminders and updates.
- Email or text our **shareable graphics** to your team members once a week with a personal message asking them to participate. Don't forget to include the **campaign website link**.
- Distribute, email or hang **campaign flyers**.
- Change your **virtual meeting background** to our custom PRESGiving captain design.
- **Join the conversation!** Chat with other captains, share your successes and discuss challenges in our captains' Teams group.

HOW TO RUN A

# Successful Campaign

**Focus on hope, not obligation.**  
**Our communication celebrates employees, ignites the human spirit and expresses gratitude.**



**You can help us do that by:**

- Being positive and inspirational.
- Being clear and brief.
- Keeping your message simple and focusing on no more than 2-3 points.
- Tying in real stories of impact and making your message relatable to the people you are speaking to.



**PRO TIP**

A sincere thanks goes a long way! Thank everyone you talk to, even if they don't give.



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# EVENTS TO LOOK FORWARD TO

## **VIRTUAL CAPTAINS KICK-OFF** **OCTOBER 25**

- Online event including inspirational speakers, games and more.
- Registration links and more details will be emailed.

## **CAMPAIGN KICK-OFF** **NOVEMBER 1 – 3**

### ● **Morning Window: 6 a.m. – 1 p.m.**

Make a gift or confirm your current one. When you do, you'll receive a PRESGiving retractable badge reel in the mail. In addition, your name will be automatically entered into the "pop quiz" email series and will be released over a 3-day window. In-person details coming soon.

### ● **Email Pop Quiz Series: Starting Tuesday, November 1 at 1:30 p.m. through Thursday, November 3 at noon.**

Employees who participate using the online form on November 1 from 6 a.m. – 1 p.m. will receive five emails, each with a one-question quiz. Answer it correctly for your chance to win one of our raffle prizes.

- **Be one of the first 50 employees** to submit the online giving form in the morning window and receive a free pair of PRESGiving dress socks.

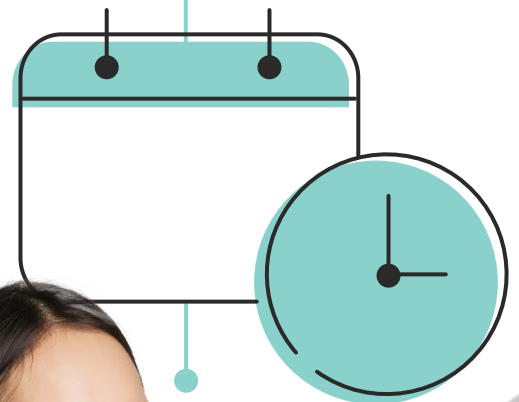
## **PRESGiving Gives Back Week** **NOVEMBER 14 – 18**

- A week dedicated to giving back to our employees.
- Our team will surprise random departments at PKH, PH and RMC with special goodies and treats to say thanks to those who give back to our community.



### **PRO TIP**

Work with your team to connect you and set up meetings.



**Whether you are comfortable making an ask or if you find it intimidating, here's how to strategize a plan that works for you.**

MAKING  
THE

**ASK**

### **CRAFT YOUR PLAN**

- Who are you going to talk to, how will you reach out to them and what will you share about the campaign?
- Prepare your message and know what you want to say. Refer to the virtual captain toolkit for resources such as conversation starters, flyers and more.
- Make sure all your co-workers know how they can participate.
- Familiarize yourself with donation types: Payroll Deduction and PTO Pledges.

### **EXECUTE**

- Make sure you have a deliberate goal for each email, meeting or conversation. For example, is the purpose of your communication educational, informational or perhaps a dedicated ask for a donation?
- Be clear about your ask.
- Be specific about how gifts are used to further the mission of different funds.
- Always include the campaign website link when you can.
- Encourage employees to return the pre-campaign mailer in the return envelope received.
- Follow up within 7-10 days.
- Personalize your ask in individual emails and outreach.
- Report results to your team.
- Thank them for their time and consideration, especially if they are giving or have made a gift. A little thanks can go a long way!



# CAMPAIGN REWARDS

Support a cause of your choice and receive some perks as a thank you to...

# YOU!



## ● BARISTA BUCKS PUNCH CARD

Employees who donate via payroll deduction or PTO will receive the option to enjoy a Barista Bucks punch card to be used only in the 2023 year or pay it forward to a frontline worker to enjoy instead. (See flyer for more details.)



## ● DALE 4 SALE

The department/team with the most campaign participation will win a few hours with Dale Maxwell, who will interact with your department and personally thank you for your generosity.



## ● I GIVE CARDS

Employees who give will receive the “I Give” card to display in their personal workspace. These will be sent in each employee’s confirmation email after they complete the online giving form. Current donors who do not interact with the online giving form will be sent their “I Give” card in an email at the start of the campaign.



## ● EMAIL SIGNATURE BADGE

Proudly display your PRESGiving support by including a special donor badge in your email signature.



# EARN EXCLUSIVE CAPTAIN REWARDS

This year, when you reach a total of **20 POINTS**, you'll receive an exclusive, captain-only prize package. It's the ultimate way to give back, do what you love – and get rewarded while doing it!



**1**

**POINT**

Make your own payroll deduction or PTO gift

**1**

**POINT  
PER CAPTAIN**

Recruit a **NEW** captain in a **NEW** department for this year's campaign

**2**

**POINTS**

Return as a captain for two or more consecutive years

**3**

**POINTS  
PER PRESENTATION**

Schedule a PRESGiving representative for a department presentation

**5**

**POINTS  
PER DONOR**

Obtain a **NEW** payroll deduction or PTO donor

**10**

**POINTS**

Increase your department's total giving by 10%

Captain Rewards may include items of value including discounts on goods or services, gift cards and products. By accepting this package, you agree to pay any taxes associated with the value of these items. This amount will be communicated at the time of opt-in.

# PTO PRESGiving FAQs

As Presbyterian employees, we have the wonderful opportunity to use our Paid Time Off (PTO) to make a charitable donation.

The details of this process can be a bit confusing so we want to provide this Q&A to help answer some common questions.

## How Are PTO Hours Pledged?

PTO donations are pledged in hours. For example, you can pledge 1 to 200 hours. These hours are then “sold” and converted to dollars that are used to support a designated Presbyterian program through Presbyterian Healthcare Foundation. To facilitate your PTO donation, visit the Online Pledge Form at [PRESGiving.com](https://PRESGiving.com) or search PRESGiving on PresNet.

## What Programs Can I Support Through PTO Donations?

There are currently four Presbyterian programs you can choose to support with your PTO donation. They include Patient Assistance, Clinical and Nursing Education, Area of Greatest Need and the LCMC Unrestricted Fund. Your PTO donation will be deducted in one lump sum and routed directly to Presbyterian Healthcare Foundation for processing in September 2023.

## What is the Value of My PTO?

PTO is valued based on your rate of pay multiplied by the number of hours you choose to donate. In order to ensure that you are not liable for taxes at the end of the year, Presbyterian payroll then deducts taxes on your behalf at the current taxable rate of 35.55%. The net amount is then applied to your PTO pledge.

**For example,** if your rate of pay is \$10 and you pledge 40 hours, your net donation would be  $\$10 \times 40 \text{ hours} \times 0.6445 \text{ (tax rate)} = \$257.80$ .

## Can I Make a Multi-Year Pledge?

Yes! You can make a multi-year PTO pledge designating the number of hours you'd like to give in each year.

## What is the Deadline For PTO Donations For PRESGiving?

Due to IRS regulations, PTO pledges must be made by December 31, 2022. These pledges will be deducted in September of 2023.

## Can I Change the Number of Hours After My Pledge is Made?

You can always reduce the number of pledged hours or cancel your PTO pledge if you find that you no longer have sufficient PTO hours in your bank or simply no longer wish to donate. After December 31, 2022, however, IRS regulations prevent increasing the number of PTO hours that you can donate in the current year. Careful planning is required to make sure that you don't hit the maximum cap of 360 hours in your PTO Bank and cease accruing PTO until hours are utilized.

## Can I Donate PTO Hours to Employees in Need?

Although you can support the Employee CareFund with cash donations through PRESGiving, PTO donations to the CareFund cannot be done through PRESGiving. PTO can be donated to employees in need through the Employee Leave Bank administered by Presbyterian Human Resources. Due to the nature of these PTO donations, they are not tax-deductible to the donor. For more information, visit the Employee Leave Bank page on PresNet or contact AskHR at (505) 923-8750.

# PTO Calculation Guide

The calculations below are intended to provide employees with an illustration of available PTO for donation in 2023.

## ANNUAL PTO ACCRUAL RATES

for Full-time Employees

### PTO Eligibility Years

	< 1 year	years 1 < 5	years 5 < 10	10+ years
staff/manager	200 hours/year 7.08 hours/pay period*	200 hours/year 7.69 hours/pay period	240 hours/year 9.23 hours/pay period	280 hours/year 10.77 hours/pay period
director	240 hours/year 8.61 hours/pay period*	240 hours/year 9.23 hours/pay period	280 hours/year 10.77 hours/pay period	280 hours/year 10.77 hours/pay period
senior leader	280 hours/year 10.15 hours/pay period*	280 hours/year 10.77 hours/pay period	280 hours/year 10.77 hours/pay period	280 hours/year 10.77 hours/pay period

\* Presbyterian puts 16 hours of PTO into the PTO Banks of newly eligible full-time employees during their first week of employment. The number of PTO hours earned for the remaining pay periods of the first year is adjusted to result in the stated first year Annual Accrual Rate. This applies to employees whose start date is September 8, 2018, or later.

## NET PTO ACCRUAL AT THE TIME of the PTO Draw in 2023

### CALCULATION

# of PTO Hours Earned 1/1/2023–9/2/2023 Draw – Holiday Hours = Net PTO Accrual at PTO Draw in 2023

	< 1 year	years 1 < 5	years 5 < 10	10+ years
staff/manager	134.52 PTO–32 Holiday= <b>102.52 Net Hours</b>	146.11 PTO–32 Holiday= <b>114.11 Net Hours</b>	175.37 PTO–32 Hours= <b>143.37 Net Hours</b>	204.63 PTO–32 Holiday= <b>172.63 Net Hours</b>
director	163.59 PTO–32 Holiday= <b>131.59 Net Hours</b>	175.37 PTO–32 Holiday= <b>143.37 Net Hours</b>	204.63 PTO–32 Hours= <b>172.63 Net Hours</b>	204.63 PTO–32 Holiday= <b>172.63 Net Hours</b>
senior leader	192.85 PTO–32 Holiday= <b>160.85 Net Hours</b>	204.63 PTO–32 Holiday= <b>172.63 Net Hours</b>	204.63 PTO–32 Holiday= <b>172.63 Net Hours</b>	204.63 PTO–32 Holiday= <b>172.63 Net Hours</b>

\*\*There are 18 pay periods and 32 hours of holiday time from January 1, 2023 – September 2, 2023. The above calculation assumes that the employee takes PTO for those holidays. Net PTO Accrual is in addition to PTO Hours currently in your PTO Bank.

To calculate your net PTO value, multiply your hourly pay rate by the number of hours you are planning to donate, then multiply that value by 0.6445 (the net taxable rate).

**For example,** if your rate of pay is \$10 and you make a pledge of 40 hours, your net donation would be \$10 x 40 hours x 0.6445 (tax rate) = \$257.80.

YOUR  
**PRESGiving**  
CONTACT



**NYRA KLAWER**

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