

2016/2017 State Employees' Community Campaign



Agency Coordinator Manual

www.insecc.org

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Whom to Contact

Statewide SECC Coordination:

Melissa Helsby Thomas

SECC Statewide Coordinator

Indiana State Personnel Department
402 W. Washington Street, Rm. W-161
Indianapolis, IN 46204
methomas@spd.in.gov

Responsibilities: Reports to the SECC Director. Coordinates the SECC statewide. Establishes campaign timelines, organizes kickoff and award meetings, arranges agency coordinator training, distributes campaign materials, monitors campaign progress, and acts as a liaison to the state agency coordinators.

Campaign Services/Fiscal Issues:

Maggie Snyder

SECC Campaign Manager

Indiana Association of United Ways
3901 N. Meridian St., Suite 306
Indianapolis, IN 46208
Phone: (317) 921.2004
Maggie.snyder@iauw.org

Responsibilities: Provides policy and procedural consultation to the SECC Director and statewide coordinator. Makes recommendations to SECC Administrative Committee. Prepares SECC materials and trains state agency coordinators. Acts as a liaison to charitable organizations, processes pledges, compiles campaign reports, provides campaign analysis, prepares payroll transactions for the Auditor of State, and distributes contributions to charities.

2016/2017 SECC Administrative Timeline

September 16	Kickoff
September 16	Weekly Campaign Reports due*
September 23	Weekly Campaign Reports due*
September 30	Weekly Campaign Reports due*
October 7	Weekly Campaign Reports due*
October 14	Weekly Campaign Reports due*
October 21	Weekly Campaign Reports due*
October 28	Campaign wrapping up
November 4	ALL pledges, Special Event Reports and paperwork MUST be turned in to the Statewide SECC Coordinator.
March 2017	Awards Ceremony for 2016/2017 SECC

***Weekly campaign reports should be turned in to Statewide SECC Coordinator in State Personnel. Please do not request a receipt for cash pledges. Make a copy of the outside of the envelope prior to taking to State Personnel. Success stories and pictures that Agency Coordinators would like to share with others should be sent to Maggie.Snyder@iau.w.org. Please include the name of the event and the names of people in the pictures. Pictures can be an incentive for employees to go to the SECC Web site.**

2016/2017 SECC At A Glance

- Dates:** September 16—November 4
- Participants:** Any 501(c)(3) nonprofit charity that can offer the donor a tax deduction is eligible to receive a contribution through the 2015/2016 SECC.
- Campaign Chair:** Kent Abernathy, BMV Commissioner
- Campaign Goal:** \$1.4 million
- Campaign Theme:** Everyone Makes a Difference
- Agency-Wide Awards:**
- Per Capita**
 - GOLD** \$75 and Up
 - SILVER** \$60 to \$74
 - BRONZE** \$50 to \$59
- Largest % Increase by Agency**
- 1-50** employees (Traveling trophy)
 - 51-250** employees (Traveling trophy)
 - 251+** employees (Traveling trophy)

Money raised through special events will not be included in the calculation for these awards.

Champion Award

Recognition will be given to an agency if 20% or more of its givers make a contribution at the **CHAMPION** LEVEL of giving. (**Champion** givers are state employees who contribute one-half hour's pay per check.)

Agency Coordinator Job Description

Position: Agency Coordinator

Reports to: Agency Head

Major Focus: SECC

Agency Coordinators, individually and collectively, are the most important people in the SECC. The success of the campaign in each agency is dependent upon the leadership of the Agency Coordinators. Under the direction of the respective Agency Head, an Agency Coordinator is responsible for the execution and successful conclusion of the campaign.

Responsibilities:

- Attends a SECC training session.
- Encourages employees to attend Kick-Off event.
- Works with the Agency Head to create a campaign plan with agency goals, strategies, and timetables.
- Ensures the implementation of the agency's campaign plan.
- Recruits a campaign committee and communicates campaign strategies, expectations and reporting requirements to its agency.
- Establishes assistants within central offices and liaisons at each field location (particularly important with large agencies).
- Ensures that every agency employee receives a campaign brochure and promotes the online use of e-Pledge.
- Reports campaign progress weekly and keeps Agency Head advised on agency's campaign progress.
- Submits pledge cards and cash to the State Personnel Department, 402 West Washington Street, Room W-161; Indianapolis, IN 46204; Attn: Melissa Thomas, SECC Coordinator, no later than Friday, **November 4. Please do not request a receipt for cash pledges.**

How to Run a Successful Campaign

You have been chosen for a very important job that will have a positive effect on thousands of people. Your efforts to raise money through the SECC will have lasting results all year long. Thank you for helping to reach the SECC goal of \$1.35 million.

Follow these steps to run a successful campaign. For further information, see details on the SECC website, www.insecc.org.

1. Get top level support

- * Meet with your Agency Head or Department Supervisor; get agreement from him/her to endorse the campaign

2. Recruit a committee to help you

- * Don't try to do it alone; get help from co-workers

3. Set a challenging goal

- * Review last year's history
- * Reach toward higher achievement

4. Emphasize payroll deduction as the easiest way to give

- * Ask everyone to consider giving one-half hour's pay per pay check

5. Target special giving groups

- * Torchbearer Society
- * Non-givers
- * Champions

6. Decide fund-raising technique

- * Group meeting *Ask everyone to give!*
- * Educational fundraising

7. Keep campaign short and enthusiasm high

8. Follow Through, Report Results, Say Thanks

- * Use SECC e-Pledge
- * Make sure every employee has been reached
- * Turn in paper pledge forms
- * Thank volunteers and contributors for their support.

The Employee Group Meeting

TIME	CONTENT	PRESENTER
1 Min	Welcome * Greet employees. * Distribute brochures. * Outline purpose of meeting. * Introduce Agency Head, a Supervisor, or management's representative to endorse the SECC campaign.	Agency Coordinator
2 Min	SECC Endorsement * Explanation of support by Agency Head or Supervisor. * Endorsement by employees who have used services from charities eligible to receive contributions through the SECC.	Agency Head, Supervisor or Senior Management
15 Min	SECC Speaker * Introduce speaker(s) * SECC Message	Charity Rep and/or Agency Coordinator
4 Min	Campaign Information and Closing Remarks * Explain e-Pledge and ease of payroll deduction. * Encourage employees to make their charitable contribution through the SECC. * Offer to answer questions individually after group is dismissed. THANK EMPLOYEES FOR THEIR SUPPORT!	Agency Coordinator

Employee Meetings or Rallies

- * Hold the meeting away from the normal work area.
- * Arrange to have fellow employees share their experience with a participating charity.
- * Arrange to have a Charity Representative speak at your meeting to talk about the clients they serve and the programs they provide. *Call Maggie Snyder at 317.921.2004 to arrange a charity speaker for your meeting.*

Continuous Giving

Guidelines:

State employees who contributed through a payroll deduction in 2014 and who wish to continue that contribution are **not** required to make a new pledge. Their prior payroll deduction pledge will remain in effect for the 2016/2017 campaign unless it is changed by the contributor making a new payroll deduction pledge or by the contributor contacting SECC to terminate pledge.

- * **Completion of a new payroll deduction pledge will NOT ADD to last year's contribution, but WILL REPLACE IT.**
- * **Making a one-time contribution will not stop a payroll deduction.**

Implementation, confirmation and affirmation of continuous pledges may take different forms in different state agencies. However, the following items should be addressed:

- * Send a thank you email to each continuous contributor, assuring their awareness of the continuous pledge (see SECC Web site for Coordinator Resources/Sample Letters).

You can obtain a list of your continuous givers by logging in to the SECC e-Pledge System and, from the Reports menu item, running the Response Report for the previous year.

- * Encourage continuous givers to visit the SECC Web site, **www.insecc.org**. Charities that received a contribution in prior years and their SECC Charity Codes are easily searchable on that Web site. There is also a link to the e-Pledge Web site.
- * Continuous contributors may also review their giving history by logging into their e-Pledge account.

SECC FAQs

1. Is the SECC the United Way campaign?

The State Employees' Community Campaign (SECC) is not the United Way. The SECC is your workplace fund raising campaign and is authorized by a Governor's Executive Order. It is **your** fund raising campaign operating under rules developed by your fellow employees. We, the Indiana Association of United Ways (IaUW), are the Agent for the SECC, and the State contracts with us to provide fiscal and campaign services for the SECC. We keep all SECC contributor funds in a separate bank account so they are not co-mingled with any other money. We are audited annually by independent auditors to make sure we are doing our job correctly and accurately.

2. How do I find a list of charities?

Using your computer's browser, navigate to <http://www.insecc.org> and click on the link for Charity Codes. You may search for a charity's SECC code number by entering a word or two that is part of the charity's name.

3. Why is the charity that I want to donate to not listed on the SECC site?

Charities listed on the SECC web site have been researched and verified that they have a 501(c)(3) ruling from the IRS. They are then assigned an SECC code number and added to the database. If the charity you want to donate to is not listed, you may write-in the name of the charity, address and/or phone number. Once we receive the pledge with the information, we will verify that the charity has their 501(c)(3) ruling from the IRS. If the charity has the proper credentials, it will be assigned an SECC code number and will appear on the searchable charity codes list. If the charity does not have a 501(c)(3) IRS ruling, we will notify you that the charity does not qualify under the SECC Guidelines and you will be asked to choose a different charity.

4. If I contribute \$100 to a charity, how much does the charity receive?

State employees are allowed to use the Auditor of State's payroll system to contribute to charity, but the State does not use any public or State money to support the operation of the SECC. Therefore, the charities that benefit from contributions through the SECC must pay their share of the SECC's costs. Those costs include printing SECC materials, processing and tracking pledges, creating the payroll transactions for the auditor of State's payroll system and making quarterly payments to charities.

The administrative percent for the 2016/2017 SECC is projected to be no more than 8%. However, we also distribute to the charities their share of the interest income earned while SECC contributions are in the bank, increasing the net amount a charity realizes from contributions through the SECC.

If you fulfill a contribution of \$100 to a charity, the charity will net more than \$92 through the 2016/2017 SECC.

5. If I make a payroll deduction pledge now, when will withholding start?

Withholding will start with the first payroll in 2017.

6. When are charities notified of my contribution?

We issue a "final" report on the amounts pledged and the amounts designated to each charity no later than January 15 of the year in which pledges are collected. We then send a notification letter to each charity accompanied by a list of their donors and their amounts pledged. If a state employee checks the "request acknowledgement box" when entering their pledge using the SECC e-Pledge system or when completing a paper pledge form, we also release the employee's home address to the charity.

7. How do I know that the charity I specified received my contribution?

When using the SECC e-Pledge system or if you complete the SECC

paper pledge form, we recommend that you check the “request acknowledgment box”. By checking that box you authorize us to release your address to your charities so that they may send you a thank-you letter. The minimum contribution that can be acknowledged is \$26.

8. If I make a contribution now, when will my charity receive my money?

We are required to make distributions to charities in the month following the end of each calendar quarter. For the 2016/2017 SECC we will cut checks in April, July, and October of 2017, with the final disbursement due in February, 2018. We withhold up to 8% of the amount pledged from the first disbursement and we add the charity’s share of the interest income earned to the last disbursement. One-time contributions (cash, check, and credit card) are fully disbursed in the April check.

9. When the charity receives an SECC disbursement, will they get a breakdown of the check showing my contribution?

We offer charities access to an online portal that allows them to see a breakdown of each check they receive.

10. Is my contribution through the SECC tax-deductible?

Yes. Because you must direct your SECC pledge to a 501(c)(3) charity and because the Indiana Association of United Ways itself has a 501(c)(3) ruling from the IRS, if you itemize when you file your federal income taxes, to the extent allowed by law, your charitable contribution is tax-deductible in the year it is paid.

For example, if you make a pledge through the SECC to one or more charities in the Fall of 2016 and pay your pledge in 2016 by check, cash or credit card, that contribution may be claimed as a deduction in tax-year 2016. However, if you make your SECC pledge in the Fall of 2016, and pay it through payroll deduction in 2017, that contribution would be claimed as a deduction for tax-year 2017.

If you have questions or concerns about the deductibility of your contribution through the SECC, you should consult your tax professional for advice.

11. How do I get written substantiation of my contribution for tax purposes?

If you claim a charitable deduction and your tax return is audited, you will be required to have a written, contemporaneous receipt from the charity(s) to which you contributed or the IRS will disallow the deduction. So, we recommend that you keep all documents in a safe place with your tax records.

If you are a state employee that paid your pledge by cash or credit card, the Indiana Association of United Ways, as SECC fiscal agent, will mail you a written tax-receipt on January 31.

If you are a state employee that paid your pledge by payroll deduction, your final pay voucher along with the e-Pledge printout (click the Print button on the final e-Pledge screen and/or check the box to request a confirmation to be e-mailed to you) or the second copy from your completed paper pledge form. These documents satisfy the IRS requirement. If you would also like to have a tax letter from the SECC, you must request one before **April 15, 2017** and we will mail it to you.

12. Do charities get any percentage of undesignated dollars? Who decides the distribution of undesignated dollars?

There are no undesignated dollars in the SECC. Under the SECC's rules, all contributions must be directed to a charity of the employee's choosing. Again, state employees can contribute to any not-for-profit organization that has a 501(c)(3) ruling from the United States Internal Revenue Service, but you **must** specify where you want your contribution to go. If you do not enter a valid SECC code number or write-in a charity's name and address, we will not be able to process your pledge, and we will notify your SECC coordinator to contact you.

13. If a charity has an allocation from SECC, do designated dollars increase the allocation?

The SECC is just a mechanism to give you access to the State's payroll deduction system. The SECC itself is not a charity. So, there is no SECC allocation, no admissions process, no undesignated funds. You tell us where you want your contribution to go and, as long as it is a charity with a 501(c)(3) ruling, they get your money, less the administrative fee, plus the interest income your money earned while it was banked.

14. If I made a payroll contribution to a charity last year and I want to keep it the same, do I have to do anything?

Under the rules of the SECC, payroll deduction contributions to charities are continuous until you make a change in writing. If you want your payroll deduction contribution to go to the same charity and there is no change in the amount, you don't need to do anything. If you do make a new pledge and it is paid by payroll deduction, you will need to remove the prior year's designation(s) that you wish to change before you add a new or changed designation.

15. How do I stop a payroll deduction pledge?

The only way to stop a payroll deduction pledge is to either use the SECC ePledge System and indicate No Gift on the Pledge Screen or, during non-campaign time, notify the SECC Fiscal Agent in writing. To log on to SECC ePledge, using your computer's browser, navigate to www.insecc.org and click on the link for Make A Pledge. To contact the SECC Fiscal Agent, see page 24 in this Manual.

16. Will a cash (one-time) contribution stop a payroll deduction pledge?

If you make a one-time contribution (cash, check, or credit card), it will **not** stop a previously made payroll pledge.

17. How many charities can I contribute to?

There is no limit.

18. Is there a minimum contribution amount?

Yes, under the rules developed by your co-workers, the minimum payroll deduction pledge is \$1 per pay per charity. The minimum one-time contribution (cash, check or credit card) is \$5 per charity. However, we recommend that you consider making a payroll contribution equal to one-half hour's pay per check. State employees that contribute a half-hour's pay per check are recognized as **CHAMPIONS**.

19. What is *The Torchbearer Society*?

We call our leadership giving recognition program *The Torchbearer Society*. Membership in *The Torchbearer Society* is open to those individuals who have the commitment to make a leadership contribution of \$1,000 or more through the State Employees' Community Campaign. There are three recognition levels based on the amount of your annual SECC contribution:

Torch Lighters contribute \$1,000 to \$1,499 annually
Guiding Lights contribute \$1,500 to \$2,499 annually
Shining Stars contribute \$2,500 or more annually

In 2015, 208 state employees made such a generous commitment. If you would like to join them, simply make a contribution of \$1,000 or more through the SECC. You will be contacted about how you would like to be listed as a member of *The Torchbearer Society*.

20. What is a **CHAMPION**?

Champions are people who put forth extra effort to reach a goal. A giving recognition program of the SECC, CHAMPIONS are state employees who pledge one-half hour's pay per check to make their community a better place for everyone.

SECC e-Pledge

1. Log on to the SECC Web site: www.insecc.org
2. You can check to see if your charity has a 501(c)3 ruling and search to see if it already has an SECC Charity Code.
3. Click on “Pledge Now.”
4. SECC e-Pledge will guide you through the entire process from start to finish.

SECC e-Pledge is fast. It’s easy. It’s secure.

The SECC e-Pledge Log in Screen:

Enter your SECC e-Pledge **User ID**. It is the first letter of your first name plus the last 6-digits of your PeopleSoft number.
(SECC e-Pledge is not in any way connected to the PeopleSoft system.)

Enter your **Password**. It is the first letter of your first name, plus the first two letters of your last name (skip special characters like an apostrophe) plus your 4-digit birth year.

Click the Log in button and you will arrive at the SECC e-Pledge home page.

SECC Home Page:

From the home page you can make a pledge, check your giving history, and as an administrator, run reports.

Account History:

When you click on the link for Account History you will be able to review your prior years’ contributions.

Follow the directions on the Account History screen to renew or change your previous pledge.

The campaign years in the report are listed as 2016/2017 because the pledge is made in 2016 and paid out in 2017.

Making A Pledge:

Click on the link for “Pledge Now” and indicate whether you want to make a contribution by payroll deduction, credit card or not at all.

If you want to contribute by cash or check you must complete a SECC paper pledge form. Attach the cash or check to the pledge form and give it to you coordinator.

If you do not wish to contribute to the 2015/2016 SECC click the radio-button for “I do not wish to make a pledge this year” so that your coordinator knows that you have made a decision.

Click the Next button after making a giving method decision and click Next again on the information screens that follows.

Choosing The Charities To Which You Want To Contribute:

You must now choose the charities you want to contribute to.

You may search for a charity’s SECC code number by entering a word or two that is part of the charity’s name. Click the Search button and you will see all charities with that word in the name.

We do not recommend clicking the View All button since there are approximately 2,400 charities with codes in the SECC database and it takes a long time to scroll through them.

After you click the Search button, on the next screen, select the charities to which you wish to give and enter the amount. After entering a pledge amount, click the Add button.

You may need to scroll down to see all the choices.

Enter the amount per pay if you are giving by payroll deduction or the total amount if giving by credit card.

After clicking the Add button, you will be returned to the Search screen. You may choose to contribute to as many charities as you wish by repeating the process.

If you want to write-in the name and address of your charity, you may scroll down and click the Write In button.

The Write In screen will allow you to type in the amount you want to contribute to the charity, as well as the charity's name and address.

Click the Add button after you have entered the information.

When you are finished choosing your charities, click the Next button at the bottom of the Search screen.

Finishing your pledge:

On the next screen, if you would like the SECC e-Pledge system to email you a confirmation, check the confirmation box. Enter your email address in the space provided. We strongly recommend you request a confirmation.

We also suggest that you check the box to receive an acknowledgment so that we may release your address to the charities you donated to. Click the Next button.

On the Review and Confirm screen, carefully review your pledge decisions.

If you want to make a change to your pledge or the charities you chose, click the Previous button. **Do not** use your browser's Back button.

If your information is correct, click the Confirm button. Your pledge will be recorded.

If you click the Cancel button, you will return to the home page and no pledge will be recorded.

On the “For your records” screen, you can print a copy of your pledge and then log off.

We strongly recommend that you print a copy of your pledge and put it in a safe place; it will serve as your written receipt for tax purposes.

That’s it. You’re done making a pledge. Don’t forget to **log off** and **close** your browser window.

Reports:

As an administrator, you will have a Reports menu item. State employees that are not administrators will not have the Reports menu. If you log in and do not see the Reports menu, please contact Maggie Snyder to clarify your status as a SECC Coordinator.

When you click on the Reports menu, you will be able to run a number of different reports that will make your job easier. We will discuss how to run those reports at Coordinator training.

Reports use abbreviations to describe the columns. The following are a few you will see:

DC – Designated Contribution. All SECC contributions need to be designated to a charity.

Ack – Employee has requested an acknowledgement from the charity they have contributed to and their name and address has been released to the charity.

Ldr – Contribution has reached the Torchbearer Society level (\$1,000 or more)

Pub – After the campaign, all Torchbearers are asked if they would like their name published on the Torchbearer Roster. This is set to a default of N until each person is contacted.

Fun(d)-Raising Ideas

Please note: Special Events should only be used to raise *awareness* and create enthusiasm. The most effective way for employees to give is through payroll deduction.

Hold Employee Meetings or Rallies

- Hold the meeting away from the normal work area.
- Invite a speaker from a nonprofit organization to talk about their programs or have a fellow employee share their experience. (Contact Maggie Snyder for assistance.)

Publicize Your Event

- E-mail messages, agency newsletters, posters, banners, thermometers. Keep everyone updated on campaign progress.

Use a Theme

- Under the Sea, Hot Air Balloons, etc. Can be agency-specific.

Encourage Contests

- Some examples are Jeopardy, Office Olympics, Corn Hole, scavenger hunt or Agency Walk/Run with team competition.

Other Ideas

- Executive car wash, Dunk Tank, Bonus Jeans Day.

Lotteries and raffles are not permitted in the SECC campaign.

Events that involve preparing food are not encouraged because of health and safety concerns.

Report special event results on the SECC Special Events Report Form. It can be downloaded from the SECC Web site, www.insecc.org. Click on the link for Coordinator Resources.

All coins should be converted to paper currency, check, or money order. Please do not request a receipt for cash.

SECC Reminders

Encourage all employees to visit the SECC Web site by emailing them the URL www.insecc.org.

Employees can review their giving history and make a new pledge, choose either payroll deduction or a one-time donation.

- Choose your charities and amount. If your charity already has an SECC Charity Code, select it and enter the amount in the space provided. If your charity does not already have an SECC Code, enter the name, address, and amount in the space provided for write ins.
- Check the box for acknowledgement if you want to receive a written thank you from the charities you chose.
- Click the confirm button.
- You **must** choose a charity in order for your pledge to be processed.
- The minimum donation to any single charitable organization is \$1.00 per pay period, or \$5.00 for a one-time gift. One-half hour's pay per check is the recommended amount.

If you would like to contribute by writing a check or giving cash (not recommended), blank pledge forms are available on the Web site. Make checks payable to the SECC. Attach the check or cash to the pledge form and send to Melissa Thomas, Indiana State Personnel.

Bill-me and one-time payroll deductions are not an option.

Pledge forms are read by a scanner; please remind co-workers to not write outside of the boxes provided!

Do not leave any section blank. Without the following, the card will be returned:

- Name
- Method of Payment box checked
- Charity(s) indicated
- Signed and dated

Do not write anything other than numbers in the amount or charity code boxes. Dollar signs (\$), dashes (--), or lines will stop the scanner and slow processing of your results.

Tearing up, crossing through a pledge card, or writing a note on the pledge card will **NOT** stop a payroll deduction. Likewise, making a one-time contribution will not stop a payroll deduction.

An employee MUST indicate “no pledge” on the ePledge screen or notify SECC in writing if he or she wishes to stop a payroll deduction.

For those agencies located in the IGC:

Normally, when putting up signs in the Indiana Government Center, you need to file a request through the Department of Administration. However, they have always permitted signs to go up around SECC time without making this request. We do ask that you **not** tape any signs to exterior doors or painted/varnished doors and walls. Also, please make it a point to take down all of your signs once your event is over. If you are holding a bake sale, you need to hold it in your agency area, not in the atrium, cafeteria area, etc. While the SECC does not encourage bake sales, we are not going to be the cookie police.

Resources

Please see additional information on the SECC Web site. Some useful information you might want to access is listed below.

- * SECC Web site: www.insecc.org
- * This Coordinator Manual
- * SECC FAQs for State Employees
- * SECC Ten Steps to Success
- * How To Make a Pledge
- * Sample Letters
- * Per capita listings
- * Last year's results
- * How to handle objections and concerns
- * And more!!

How do I contact the SECC?

SECC Fiscal/Campaign Services
IaUW
3901 N. Meridian St. Ste 306
Indianapolis, IN 46208
Voice: 317-923-2377, ext-198; FAX: 317-921-1397
email: SECC@iauw.org
www.insecc.org