

2023/2024 State Employees' Community Campaign

# Agency Coordinator Manual



<https://charities.org/secc>

## September 14 – November 10

Thank you for serving as a Coordinator of the 2023 Indiana State Employees' Community Campaign (SECC), the state's workplace charitable giving program. Your service as part of the SECC is greatly appreciated. Over the past 43 years, State employees have contributed millions of dollars to charities of their choice. That collective generosity is incredible, and it could not have been achieved without the support of Coordinators. Your leadership and commitment to public service is what sets this Campaign apart.

Our objective this year is to raise \$1.5 million. Paramount to achieving that goal is the retention of current employee donors and recruitment of new donors. This is the area where you and your fellow Coordinators can make the most impact. We need your help to invite every single employee, without coercion, to contribute to causes they love.

The following information is designed to help you succeed in your leadership role as a Coordinator.

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## CAMPAIGN OVERVIEW

The 2023 Indiana State Employees' Community Campaign (SECC) is a workplace giving program that offers Indiana state employees the opportunity to contribute to causes they care about to positively impact communities across Indiana and beyond.

The Indiana State Personnel Department (INSPD) oversees the campaign with support from America's Charities, a nonprofit that facilitates the campaign process up to and including the distribution of funds. State employees serve as coordinators, tasked with advocating for the SECC and non-coercively inviting all employees to give.

The SECC is conducted each year over a 8-week period in which employees are able to donate to the charity of their choice through debit/credit card, payroll deduction, electronic check, and special event donations. Employees are also able to roll over their prior year donations. Our goal is to inspire 20% of the 31,000 State employees to participate in the SECC and raise \$1.5 million total. Paramount to attaining this goal is the retention of current employee donors and the recruitment of new donors. This Coordinator's Manual is designed to support you in that endeavor. Strategies to reach these audiences will also be addressed during the coordinator training.



## FAST SECC FACTS

- **Website:** The SECC website and giving portal is: [www.charities.org/secc](http://www.charities.org/secc)
- **Dates:** The 2023 SECC runs September 14 – November 10
- **Participants:**
  - **Donors:** Any active State employee is eligible to participate in the SECC
  - **Charities:** More than 1,500 charities are participating
- **Goals:** 2023 SECC goals:
  - \$1.5 million raised
  - 25% employee participation
  - Payroll deduction
- **Theme:** Crossroads of Change
- **Giving portal:** May be accessed at [www.charities.org/secc](http://www.charities.org/secc)
- **Giving methods:** Employees may give using the convenience of payroll deduction, credit/debit card, electronic check, and special events – there are no paper pledges or paper checks this year
- **Minimum donation:** There is a \$2 minimum donation for credit/debit card or electronic check
- **Rollovers:** All 2022 pledges are automatically rolled over for the 2023 SECC
  - If a donor wants to keep last year's pledges the same this year, no action on their part is required
  - If a donor wants to maintain Champion giving levels of 30-minutes per-paycheck or more and have received a pay increase in the last year, they will have to adjust their giving based off of their current hourly rate. The adjusted rate will be visible to the donor in the giving portal when they select "modify an existing pledge."
  - Donors that want to change their pledge must go on the giving portal to access their giving history and make adjustments following the instructions below.

## CONTACT INFORMATION

Indiana State Personnel Department – Campaign Oversight

- [Julie Fletcher, Communications and Employee Engagement Manager, INSPD: jfletcher@spd.in.gov](mailto:jfletcher@spd.in.gov)
- [Kirolos Barsoum, Communications Director, INSPD: kbarsoum@spd.in.gov](mailto:kbarsoum@spd.in.gov)

America's Charities – Campaign Support and Funds Management

- Becky Marx, Client Engagement Manager, [secc@charities.org](mailto:secc@charities.org)

Donor/Charity Support

America's Charities Help Desk: [secchelp@charities.org](mailto:secchelp@charities.org), (703) 957-7888, or [www.charities.org/support](http://www.charities.org/support)

## 2023 SECC TIMELINE

To find answers to your Frequently Asked Questions (FAQs), visit the giving portal: [www.charities.org/secc](http://www.charities.org/secc)

- September 14, 2023: Start of Campaign and Charity Spotlight
- November 10, 2023: 7-week campaign period ends
- November 10, 2023: Campaign and extension period officially ends – all giving must be submitted by 11:59 pm ET, as well as all special event reports, and any other paperwork



## WEBSITE AND GIVING PLATFORM HIGHLIGHTS

Accessed from [www.charities.org/secc](http://www.charities.org/secc), the SECC website and giving portal:

- Allows state employees to set up payroll deductions to go to the charity of their choice online.
- Allows state employees to give a one-time donation to a charity of their choice online.
- Meets the highest security standards. Donors can give with confidence knowing their information and contribution data are safe and protected.
- America's Charities' team of experts, led by Campaign Engagement Manager Becky Marx, supports the giving portal.
- Employee donors with questions or who assistance have access to the America's Charities Donor Services Team/Help Desk 24/7: [secchelp@charities.org](mailto:secchelp@charities.org), (703) 957-7888, or [www.charities.org/support](http://www.charities.org/support)

### **SECC Giving Portal Credentials**

Beginning on September 14, 2023 each employee may login to the giving portal using the following:

**Username:** First Initial + Last 6 digits of PeopleSoft ID

Example: The username for a person named John Doe with the PeopleSoft ID of 123456 is: **J123456**

**Password:** first initial + last name

Example: The password for a person named John Doe is: **jdое**

**Note:** Passwords are case sensitive and must be all lowercase. Do not include special characters such as #, \$, !, etc.

## COORDINATOR RESPONSIBILITIES

**Coordinators are the most important people in the campaign.** You organize and run SECC at your agency, and the success of your agency depends on your leadership. Under the direction of the respective agency head, you are responsible for the campaign from start to finish, including:

- Attending a coordinator training and learning processes for the 2022 SECC
- Encouraging employees to attend the statewide kickoff event
- Working with your agency leadership to create a plan to promote the Campaign and encourage employee giving; include measurable agency goals, strategies, and timetable
- Recruiting a campaign committee to execute plan; submit goal to Becky Marx: [secc@charities.org](mailto:secc@charities.org)
- Setting weekly goals for yourself regarding which departments you'll engage, what events you'll hold, etc., and track progress and ensure that strategies and goals are on course.
- Establishing assistants within central offices and liaisons at each field location (particularly important with large agencies)
- Ensuring all employees are invited to give; no coercion is used when making the ask
- Becoming familiar with the [SECC's new giving portal](#) and assist coworkers with giving online
- Ensure that all participating employees are thanked and recognized; maintain donor confidentiality
- Reporting Campaign progress weekly and keep Agency Head advised on Agency's Campaign progress
- Scheduling and attend virtual events
- Attending the Awards Ceremony & Reception



## COORDINATOR TALKING POINTS: CASE FOR SUPPORT

- SECC gives State of Indiana employees the opportunity to support and fight for causes close to their heart, and to encourage their co-workers to join the mission.
- Whether you have it in your heart to help rescue victims of child-sex-trafficking, provide food and shelter to our neighbors experiencing homelessness, bring an end to cancer or diabetes, support our nation's veterans, or to give to your local community center, animal shelter, theater, or church, payroll deductions are one of **the best** ways to create a better world for you, and for your family.
- Coordinating and planning statewide events gives you a platform to encourage others to give to a cause close to your heart through payroll deductions.

## COORDINATOR TALKING POINTS: SECC BENEFITS

The SECC provides donors with the opportunity to support the causes they care about and shape communities across Indiana and beyond. And it's so much more:

- Like Open-Enrollment season, the State Employees Community Campaign is your only chance during the year to set up payroll deductions that go directly to the nonprofit of your choice.
- The 2023 State Employees' Community Campaign (SECC) will run September 14 – November 10.
- Giving through a payroll deduction is one of **the best** ways to give to a nonprofit that you care deeply about. It is easy for you, and it is a reliable and consistent source of income for the cause that you care about.
- If you do choose to set up a payroll deduction, we encourage you to pledge the equivalent of 30-minutes of your time per-paycheck. Pledging at that level makes you a Champion, and you receive a special SECC pin at the end of the campaign.
- To set up a payroll deduction or give a one-time donation, visit: [www.charities.org/secc](http://www.charities.org/secc)
- If you gave at the Champion level last year, and wish to maintain giving at that level, please ensure that your giving continues to be at, or over, the equivalent of 30-minutes per-paycheck as a lot of salaries have increased due to the General Salary Adjustment at the beginning of the year.
- If you give, or pledge to give, over \$1,000 within the SECC calendar year, you will be cordially invited to a lunch to celebrate your generosity at the end of the campaign.
- The SECC's giving portal is intuitive and user-friendly. Anyone with access to the internet can make a secure donation.
- The SECC's new giving portal meets the highest security standards, which means donors can give with confidence knowing their information and contributions are safe and protected

## ROLLOVER PLEDGE INFORMATION

The SECC is primarily a rollover campaign, and as such, coordinators should focus on inviting all donors to give, particularly those who have never participated, or who participated in earlier years but not in 2022.

For those who did pledge to their favorite causes in 2022, we have already imported their historic payroll pledge information into the giving portal.

### **To Rollover 2022 SECC Pledges**

If employees are happy with their current giving – both the dollars pledged and the cause(s) they support – **no action on the part of employees are required.** The pledge will roll over in 2023.



### **To Modify 2022 SECC Pledges**

However, all active employees with donations automatically deducted from their paychecks this year (due to 2022 SECC pledges) are welcome to modify their pledges. To do so, follow the instructions in the “How to Give Online” section below.

**IMPORTANT: All employees who donate – whether making a new contribution or modifying an existing pledge - MUST click “Finish” at the end of the giving process to complete the giving process.**

## **AGENCY AWARDS**

### **Per Capita**

- Gold: \$75 and Up
- Silver: \$60 to \$74
- Bronze: \$50 to \$59

Calculation based on total number of dollars raised by individual employees (not including special events) divided into the total number of employees in the Agency.

### **Champion Givers**

State employees who contribute one-half hour's pay or more per pay period.

### **Largest % Increase by Agency**

- 1-50 employees: traveling trophy
- 51-250 employees: traveling trophy
- 251+ employees: (traveling trophy)

Largest percentage increase from total dollars raised from 2021-2022 and 2022-2023; does include special event giving.

### **Champion Award**

Agencies with 20% or more of its employees contributing at the Champion giving level

Others:

- Torchbearer Society: Leadership level givers at \$1,000+

Note: Awards are given on an Agency-by-Agency basis. As Coordinators, you may recognize divisions of your Agency for outstanding performance. See list on website.

### **IMPORTANT NOTE ABOUT AGENCY EMPLOYEES**

Employees are assigned to agencies by the State. Employee information, including salaries and agency assignments, is received by America's Charities in mid-July. Any changes to employment that occur after mid-July, 2023 will not be reflected in the online portal or on agency reports until the campaign ends. Once the campaign ends, an updated roster is received, and any employment updates are made prior to finalizing the end of campaign reports.

If an employee is not showing up on your agency list (or is showing up and shouldn't), note that reports will ONLY show the employees that are designated employees of your agency, regardless of where they are located to work.

America's Charities is NOT able to make any changes to employee agency assignments or designations, those changes must be made through the State.



## HOW TO RUN A SUCCESSFUL CAMPAIGN

Your role as coordinator for the SECC is incredibly important. Your actions directly impact the people, places, and ecosystems of Indiana, the nation, and the world. We appreciate your energy, enthusiasm, as we collectively work to attain our \$1.5 million goal! The following are proven practices for running a successful campaign. For further information or ideas, reach out to Becky Marx at [secc@charities.org](mailto:secc@charities.org).

### 1. Get top level support

- a. Meet with your agency head or department supervisor; get agreement from him/her to endorse the campaign and champion it to staff.

### 2. Recruit a committee to help you

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

### 3. Set a challenging goal

- a. Review last year's history.
- b. Try to raise 5-10% more than last year.

### 4. Emphasize payroll deduction as the easiest and most effective way to give

- a. Ask everyone to consider giving one-half hour's pay per paycheck (this makes them a champion giver and can increase your Agency's chance of being a Champion Agency)
- b. See the "Case for Support" and "Talking Points" sections above for messaging you can use to discuss the value of payroll deductions and benefits for donors *and* charities alike

### 5. Target special giving groups

- a. See "Agency Awards" section for additional details.

### 6. Decide on a fundraising technique

- a. One-on-one conversations
- b. Special events
- c. \*Invite a charity to speak to staff – contact Becky Marx at [secc@charities.org](mailto:secc@charities.org) to coordinate (please allow up to a week for arrangements to be made)
- d. \*Small and large group meeting– If in-person, hold the meeting in a shared space. If virtual, hold the meeting using Zoom, Teams, or Google Meet.
- e. The important thing: EVERYONE is invited to give and no coercive tactics are used

### 7. Keep your efforts to the point and maintain enthusiasm throughout

- a. Follow through, report results, SAY THANKS.
- b. Use the giving portal, [www.charities.org/secc](http://www.charities.org/secc)
- c. Make sure every employee has been reached.
- d. Thank volunteers and contributors for their support.

\*Sample agenda for a 30-minute staff meeting with a charity speaker (6c/6d above):

Length	Content	Speaker
5 minutes	<u>Welcome</u> : Greet employees, outline meeting purpose, provide short SECC overview ('fast facts' above), introduce Agency Head or supervisor	Coordinator
3 minutes	<u>Endorsement</u> : Endorse Campaign, provide 3 SECC details (all charities pre-vetted for legitimacy, secure website, long-term impact, etc.)	Leadership
2 minutes	<u>Charity Intro</u> : Provide charity mission statement, speaker's bio	Coordinator
7 minutes	<u>Impact Statement</u> : Describe programs/services, what SECC funds benefit specifically, dollar-buy and impact statements, etc.	Charity Representative
5 minutes	<u>Q&amp;A</u> : Facilitates question/answer session with attendees	Coordinator
8 minutes	<u>Closing</u> : Thank speakers, reinforce what charity speaker said, invite giving right now (if virtual, share screen and walk through giving portal), thank participants, end meeting	Coordinator

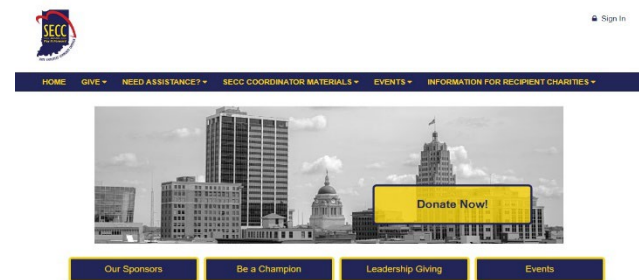
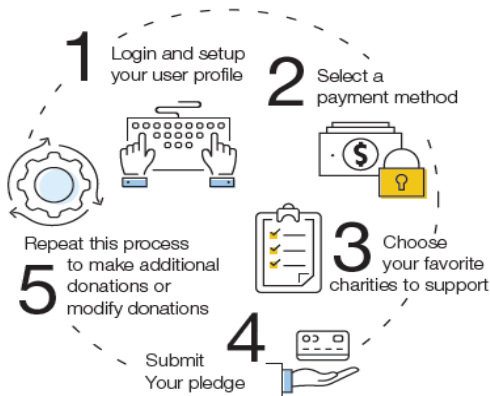
After the meeting, Coordinators should:

- Make themselves available to answer questions
- Send an email thanking participants for attending, inviting them to give right now



# HOW TO GIVE ONLINE

## MAKE YOUR PLEDGE IN FIVE EASY STEPS!



### State employees who participated in the 2022 SECC

If you are an active State employee with existing payroll deductions and you:

- Are happy with your current giving (dollars pledged and causes supported), **no action on your part is required**. Your pledge is automatically rolling over for the 2023 SECC.
- Want to check on or modify your pledge, you may do so on the new giving portal using the **instructions below**.
- Check and discover your rollover pledge is not designated to any specific organization(s), you need to **choose one or more new charities** to support. Follow the instructions below to “Modify a Gift from This Campaign.”
  - Once you select **"Modify a Gift from this Campaign"** and **select new charity(ies)** to support, your pledge **will no longer be considered "Undesignated."**
  - If you **do not modify your undesignated pledge**, it will remain classified as **"undesignated"** until you modify your gift in a future campaign. Undesignated pledges are distributed proportionally among the participating charities based upon the percentage of funds designated to each charity.

**NOTE:** For possible reasons why the charities you previously selected are not designated this year, see the Rollover Pledge Background section below. Only payroll donations rollover.

### State employees who did NOT participate in the 2022 SECC

If you are an active State employee who wants to give to causes you care about by payroll deduction, debit/credit card, or electronic check, please follow the instructions below.

#### **Step 1: Login and Setup Your User Profile**

- To get started, visit [www.charities.org/secc](http://www.charities.org/secc) and click the blue and yellow “**Donate Now**” button. You will be taken to the “Log On” page where you can enter in your credentials.
- In the “Username” and “Password” fields, enter in your credentials as follows:

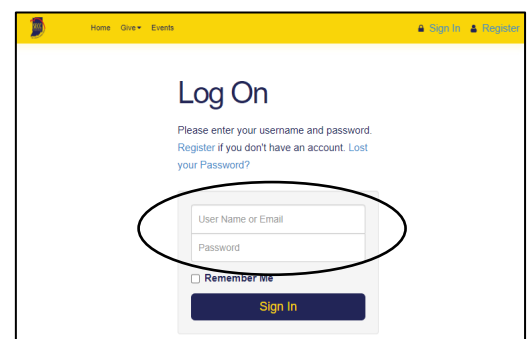
**Username:** First Initial + Last 6 digits of PeopleSoft ID

Example: The username for a person named John Doe with the PeopleSoft ID of 123456 is: **J123456**

**Password:** first initial + last name

Example: The password for a person named John Doe is: **jdoe**

**NOTE:** Passwords are case sensitive and must be all lowercase. Do not include special characters such as #, \$, !, etc.





- Once you are logged in, your username will display in the upper right corner of the screen.
- For login assistance, contact the Help Desk by [secchelp@charities.org](mailto:secchelp@charities.org), phone (703) 957-7888, or web [www.charities.org/support](http://www.charities.org/support)
- Then click **“Donate Now”** to start the pledge process.
- You will next be asked to **“Edit your profile.”** Information you enter will be provided to the nonprofits you support through this Campaign so they can acknowledge your gift upon your request. The email address listed in your profile is also where the confirmation email will be sent upon completion of your donation. You should keep a copy of this email for tax purposes.
- Select **“Continue”** when you have finished updating your contact information.

**Donors WITH Giving History:**

If you participated in the 2022 SECC, your online payroll giving history has already been loaded into the giving site. You have two options: start a new pledge or modify an existing pledge.

- If you would like to support a new charity this year, select **“Start a New Gift and Designations.”**
- If you discover that your rollover pledge is not designated to any specific organization(s), or you would like to make changes to your payroll gifts from last year, select **“Modify a Gift from This Campaign.”** Then skip down to the **“Donors WITHOUT Giving History”** section and follow the instructions from there.

**NOTE:** Once you select **“Modify a Gift from this Campaign”** and select new charity(ies) to support, your pledge **will no longer be considered “Undesignated.”** If you **do not modify your undesignated pledge, it will remain classified as “undesignated”** until you modify your gift in a future campaign. Undesignated pledges are distributed proportionally among the participating charities based upon the percentage of funds designated to each charity.

**IMPORTANT: All employees who donate, whether making a new contribution or modifying an existing pledge, MUST click “Finish” at the end of the giving process to complete their transaction online.**

**Rollover Pledge Background**

If any prior year donations are not reflected in your giving history, or your pledges are no longer designated to any specific organization(s), it may be due to one of the following reasons:

- a. You gave by a payment method other than payroll deduction such as credit/debit card, electronic check, or paper check. Only payroll donations, and no other giving methods, rollover.
- b. You gave to a charity that is not eligible to participate in the 2023 SECC. Participating charities must be verified to have valid 501(c)(3) ruling from the IRS. If your charity is not eligible this year, your contributions will be classified “undesignated,” i.e., not designated to a verified SECC charity. Undesignated funds will be distributed proportionally among the participating charities based upon the percentage of funds designated to each charity.

To obtain pledge history prior to 2021, [click here](#) or contact Caroline Bailey, Indiana United Ways: [secc@iuw.org](mailto:secc@iuw.org) or 317-660-8408.



### Donors WITHOUT Giving History:

- After clicking “**Donate Now**,” you will be asked to “**Edit your profile**.” If you opt-in at the end of the giving process, information you enter will be provided to the charities you support through the SECC so they can acknowledge your gift. The email listed in your profile is also where your confirmation email will be sent upon completion of your donation. You should keep a copy of this email for tax purposes.
- Select “**Next Step**” when you have finished updating your contact information.

## Step 2: Select a Payment Method

You may support your favorite nonprofits online via the following payment methods:

- **Payroll Deduction**
- **Credit Card or Debit Card**
- **Electronic Check**

Click “**Add**” to choose a payment method. You will then see a screen prompting you to set up your gift payment frequency and amount based on the payment method you selected.

**NOTE:** To donate using multiple payment methods, please complete all donations for each payment method in separate transactions. For example, if you select “Payroll Deduction,” choose all the charities you would like to support via payroll deduction and complete the donation process. After you submit your payroll deductions donations, then go back and select a different payment method, for example “Credit Card,” then choose the charities you would like to support by credit card, and complete the donation process for those charities.

### **Payroll Deduction:**

1. The amount you enter is the amount you would like deducted from your paycheck each pay period.
2. Once you enter an amount, it will automatically use the number of pay periods to calculate your total annual gift. That information will display on the right side of your screen under the “**Your Pledge So Far**” section.
3. The “Amount Per Period” is your suggested Champion level gift amount based on your current salary (note: updated salary information is imported prior to campaign launch). If you were a Champion giver last year and you received a salary increase at any point in the last year, you will need to update your pledge amount to maintain Champion level status.

**Note:** once the payroll deduction amount is modified by the donor, the suggested Champion level giving amount will not repopulate in the box. **We recommend donors write down the suggested amount per period prior to making any adjustments.** If a donor wishes to see their suggested Champion giving amount after the original amount is changed, they will need to cancel the pledge in progress and start a new one.

4. In the next step, you will allocate the total annual gift amount between your designated charities.

### **Credit Card or Debit Card:**

1. The amount you enter is the total annual gift amount you would like to donate. That information will display on the right side of your screen under the “**Your Pledge So Far**” section.



2. In the next step, you will allocate that total annual gift amount between your designated charities.

**Electronic Check:**

1. The amount you enter is the **total annual gift** amount you would like to donate.
2. For information on how to locate banking
3. information, click the icon next to **“Bank Account.”**
4. **Be sure to check the box at the bottom to authorize the transaction.**

Once you have finished entering your payment method preferences, click **“Continue”** to find charities to support. You can always return to this step later in the process to adjust the total amount you would like to donate.

**3: Choose Your Favorite Charities to Support**

**To find charities to support:** Click the **“Find a Charity”** button.

1. A pop-up box will appear. Use the charity name, city, state/territory, or Employer Identification Number (EIN) search features to find a specific organization, or click through the alphabetical list.
2. You can select as many charities to support as you would like. As you find charities you want to support, click **“Add”** and they will appear highlighted in blue under **“Selected Charities.”**
3. Click the orange **“Add to Designations”** button. The organization(s) you selected will now display on your list of designations.
4. You may also write-in a charity not in the list. Enter **“Write-In”** in the Search by Charity Name box and click on the logo. A pop-up box will appear where you may enter your charity’s information. The SECC fiscal agent will verify the charity prior to distribution funds distribution.

**NOTE:** You will not be able to complete giving process without designating a charity.

5. Next, you will have the opportunity to allocate your total pledge amount between the organizations you have added to your list of designations. To specify how much money to donate to each, use the slider tool or enter the exact amount in the donation box next to the charity.

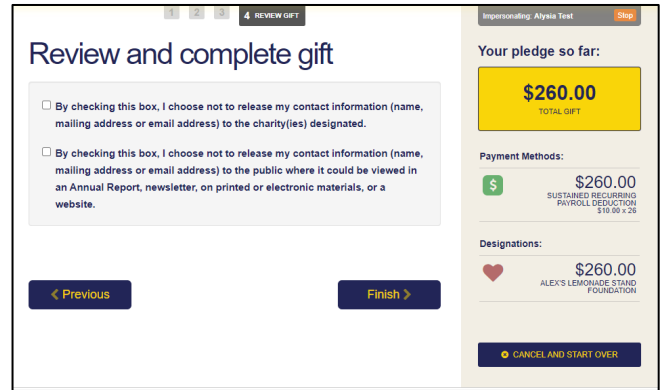


To adjust the total annual amount you would like to pledge, click the **“Previous”** button to return to the payment method screen. The charities you selected will all remain saved on your list until you are ready to submit your pledge.

When you have finished allocating your donation between charities, click **“Next Step.”**

### Step 4: Submit Your Pledge

1. You will have one final chance to review your gift and designations, and will also be able to select whether your gifts remain anonymous or grant permission to have your contact information shared with the charity(ies) you supported through the Campaign.
2. Click **“Finish”** to submit your pledge.
3. A confirmation email will be sent upon completion of your donation to the email address listed in your profile. You should keep a copy of this email for tax purposes.

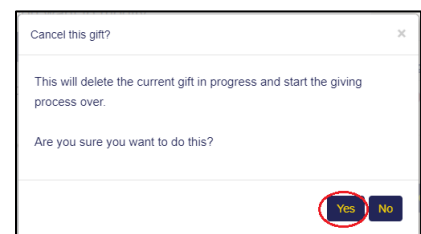
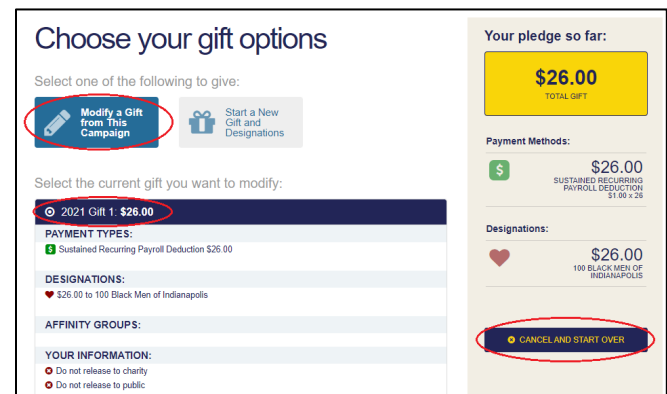


**IMPORTANT: All employees who donate, whether making a new contribution or modifying an existing pledge, MUST click “Finish” at the end of the giving process to complete their transaction online.**

### Step 5: Repeat Process to Make Additional Donations or to Modify Your Gift

If you would like to make additional donations or edit your pledge, you may edit your payroll donations anytime during the Campaign enrollment period. To cancel or modify a credit card or electronic check donation, please contact America’s Charities at [secchelp@charities.org](mailto:secchelp@charities.org), (703) 957-7888.

1. Log into the pledge site and click **“Donate Now.”**
2. You will be given two options:
  1. **“Modify a gift from this Campaign.”** Choose this option if you would like to edit a payroll deduction pledge you already submitted. By choosing to modify a gift, you will open your existing pledge for edit.
    - o You **MUST** complete all steps of the pledge process to return the gift to a completed status, **otherwise the gift will not be processed.** Modifications to credit card or electronic check donations must be made by contacting America’s Charities: [secchelp@charities.org](mailto:secchelp@charities.org), (703) 957-7888, or [www.charities.org/support](http://www.charities.org/support)
  2. **“Start a new gift and designation.”** Select this option if you would like to make a new credit card or new payroll donation.
3. Once you select an option, follow steps 1-4 from this guide to complete your pledge.



#### How to Cancel Your Payroll Pledge

1. Log into the pledge site and click **“Donate Now.”**



2. Select "Modify a Gift from this Campaign" and select the current gift you want to modify.
3. On the right-hand side, click on "Cancel and Start Over."
4. If you do not modify your undesignated pledge, it will remain classified as "undesignated" until you modify your gift in a future campaign.
5. A pop-up window will ask you to confirm deletion of your current gift. Click "Yes" if you would like to delete your payroll pledge. **Your payroll pledge will end after the final pay period of 2023.**

**Need Help?** For assistance, please:

- Email: [secchelp@charities.org](mailto:secchelp@charities.org)
- Call: (703) 957-7888
- Visit: [www.charities.org/support](http://www.charities.org/support)

## SPECIAL EVENTS

Virtual events and text-to-give are a great way to encourage giving through the SECC. Below are instructions for setting up events:

- Coordinators must obtain approval before holding any fundraising events.
- Coordinators are in charge of administering fundraising events. They should notify the State Personnel Department to keep them informed and to see if they are available to participate, or in case they need guidance.
- Coordinators wishing to set-up an event will use a tool called a Cognito form to request a special fundraising page for their event.
- America's Charities will then set-up your fundraising web page using a tool called Give Lively.
- Once your fundraising page is set up, we will email you the link to your event's page, which you can then share to collect donations for your event.
- The SECC does not use paper pledge forms and prefers donations are made online using the various methods outlined in the previous section. As such, **please make every effort NOT to collect cash contributions**. In the event that cash is collected from a special event, you may mail a check, cashier's check, or money order **ONLY** directly to America's Charities.
  - **You MUST complete the [Special Event Check Submission Form](#) PRIOR to mailing any checks.**
- Once you have completed the Special Event Check Submission Form, please mail checks to America's Charities, Attn: Indiana SECC, 14200 Park Meadow Drive, Suite 330S, Chantilly, VA 20151.

**DO NOT mail cash.** Any checks mailed without completing the Special Event Check Submission Form may not be correctly attributed to your department's totals.

### Requesting a Special Event Fundraising Site

Coordinators should request a special event site by submitting a virtual request form via this link:

#### [Special Event Fundraising Site Request](#)

**Coordinators must submit a separate form for each event.**

- For planning purposes, please allow up to a week for processing.
- The code will provide donors with a link to a unique, mobile-friendly event-specific giving page. [Click here](#) to see an example or view the screen grab on the next page.



**When submitting an event request form, please be prepared to include the following information:**

- Event start and end date
- Virtual event name (event name promoted to employee donors)
- Description of your event
  - The information submitted here is copied and pasted verbatim on the unique event landing page, thus Coordinators should take care in describing the event to donors.
  - Remember to include all key facts: where, when, and why the event is being held; how donors can participate; any giving deadlines or minimum donation requirements; the benefits of giving; and so on.
- To which charity(ies) the event funds should be designated.
  - You can choose to have funds designated to up to a maximum of five charities or select “Undesignated” if you do not wish to highlight any specific charities. Undesignated funds will be distributed proportionally among the participating charities based upon the percentage of funds designated to each charity.
  - If designating more than one charity, please enter what percent of event donations will be allocated to each designated charity.
- Event fundraising goal (optional)

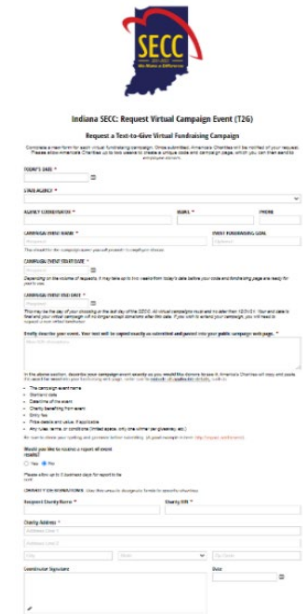


Photo 1: Special Event Request Form

- Using that information, America’s Charities will set-up the text-to-give campaign, then email the coordinator who submitted the form the site link, unique code, and five-digit text number to share with donors.
- In promotion of the virtual event, coordinators should provide the site link, five-digit number and unique campaign code to participants/donors.
- After donors’ text the unique code to the five-digit number, they will receive a reply text with a secure link to a virtual event campaign page where they can donate via credit/debit card or bank account.
- After donating, they will receive a tax receipt immediately.
- After the text-to-give campaign’s end date, upon request, America’s Charities will provide a summary report to the coordinator within two weeks.
- Donations from the event will be recorded as a single donation (total funds raised through the event) and listed as a “Special Event,” with reference to the batch number (from the request form), on the Reporting Portal.

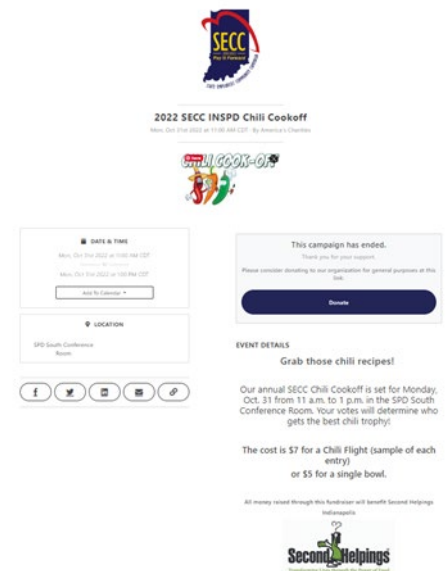


Photo 2: Special Event Sample Site

**RETRIEVING TAX INFORMATION**

Contributions to the SECC are tax deductible within the limits allowable by Federal and Indiana State law. The SECC provides no goods or services in exchange for your contribution.



- Donors will be acknowledged for direct contributions made during the calendar year. To ensure receipt of an acknowledgement, donors need to provide their home or email address. Donors will be emailed their tax receipt during the tax season following the campaign year.
- If the contribution is made by payroll deduction, ask donors to keep a copy of the confirmation email along with his/her final pay stub, which confirms the amount of contributions withheld. If the contribution was made using the online giving portal, the pledge confirmation email serves as the receipt. A tax receipt will be provided by America's Charities, regardless of the gift amount, upon the end of the calendar year during which payroll deductions took place.
- Inquiries about obtaining a donor's tax receipt may be directed to America's Charities at (703) 957-7888.
- Direct donors to consult their tax advisor. Neither the Indiana State Personnel Department nor America's Charities provides tax advice.

## GO FORTH AND CONQUER!

**Thank you** for being a champion for social good, for communities across Indiana, and for the SECC. We are grateful! Please contact Becky Marx at [secc@charities.org](mailto:secc@charities.org) if you need help.

