2024-2025 State Employees' Community Campaign

# Agency Coordinator Manual

CAMPAIGN OVERVIEW	2
FAST SECC FACTS	2
CONTACT INFORMATION	2
WEBSITE AND GIVING PLATFORM HIGHLIGHTS	3
COORDINATOR RESPONSIBILITIES	3
ROLLOVER PLEDGE INFORMATON	4
AGENCY & INDIVIDUAL AWARDS	4
SPECIAL EVENTS	5
ADDITIONAL TIPS FOR SUCCESS	8
HOW TO GIVE ONLINE	9
RETRIEVING TAX INFORMATION	. 19

# CAMPAIGN OVERVIEW

### September 12 – November 8, 2024

The State Employees' Community Campaign (SECC) is the state's workplace charitable giving program that takes place every year. Over an 8-week period, employees donate to the charity of their choice through debit/credit card, payroll deduction, electronic check and special event donations. State employees have contributed millions of dollars to charities of their choice over the years—that collective generosity is incredible, and it couldn't have been achieved without the support of Coordinators.

Our objective this year is to raise \$1.5 million and to inspire at least 25% of the over 30,000 state employees to participate in SECC. Retaining current employee donors as well as recruiting new donors will be essential. We need your help to invite every single employee, without coercion, to contribute to the causes they care about. The information in this guide is designed to help you succeed in your leadership role as a Coordinator.

# FAST SECC FACTS

- Website and giving portal: The SECC website and giving portal is: www.charities.org/secc
- Dates: The 2024 SECC campaign runs September 12 November 8, 2024
- Participants:
  - o Donors: Any active state employee is eligible to participate in SECC
  - o Charities: More than 1,500 charities are recipients of funds raised during SECC
- 2024 SECC goals:
  - \$1.5 million raised
  - o 25% employee participation (whether through events, one-time donations or payroll deductions)
- <u>Giving methods</u>: Employees can give through payroll deduction, credit/debit card, electronic check, and special events. Individual pledges may not be made via paper check.
- Minimum donation: There is a \$2 minimum donation for credit/debit card or electronic check

# **CONTACT INFORMATION**

#### Indiana State Personnel Department – Campaign Oversight

- Veronica Woodcox, Assistant Communications Director, INSPD: vwoodcox1@spd.in.gov
- Julie Fletcher, Communications and Employee Engagement Manager, INSPD: jfletcher@spd.in.gov

#### America's Charities – Campaign Support and Funds Management

Becky Marx, Client Engagement Manager, <a href="mailto:bmarx@charities.org">bmarx@charities.org</a>

#### **Donor/Charity Support**

America's Charities Help Desk: <u>secchelp@charities.org</u>, (703) 957-7888, or <u>www.charities.org/support</u> To find answers to your Frequently Asked Questions (FAQs), visit <u>www.charities.org/secc</u>



# WEBSITE AND GIVING PLATFORM HIGHLIGHTS

The SECC website and giving portal (<u>www.charities.org/secc</u>):

- Allows state employees to set up payroll deductions to go to the charity of their choice online or 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.
- Employee donors with questions have access to the America's Charities Donor Services Team/Help Desk 24/7: <a href="mailto:secchelp@charities.org">secchelp@charities.org</a>, (703) 957-7888, or <a href="mailto:www.charities.org/support">www.charities.org</a>, (703) 957-7888, or <a href="mailto:www.charities.org/support">www.charities.org/support</a>)

#### **SECC Giving Portal Credentials**

Each employee may log in 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 (*must be all lowercase*) Example: The password for a person named John Doe is: **jdoe** 

**Reminder:** 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. Your responsibilities include:

- Attending 2024 SECC campaign coordinator trainings
- Encouraging employees to attend the statewide kickoff events (The Charity Fair at the Statehouse Market on September 12, 2024 and Paddle Battle on the canal on September 13, 2024)
- 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 planning
- Establishing contacts with field locations (if applicable)
- Ensuring all employees are invited to give but no coerced in any way
- Becoming familiar with SECC's giving portal and assisting coworkers with giving online
- Ensuring that all participating employees are thanked and recognized
- Maintaining donor confidentiality
- Keeping Agency Head advised on agency's campaign progress



# **ROLLOVER PLEDGE INFORMATON**

SECC relies heavily on employees rolling over their campaigns from year to year. As such, it's important to encourage employees to maintain/increase their previous contributions or start giving if they haven't before.

#### To Roll Over 2023 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 is required**. The pledge will roll over in 2024. However, we encourage all employees to log in to the giving portal annually to ensure that their gifts are correct.

#### To Modify 2023 SECC Pledges

Employees are welcome to modify their pledges. To do so, they should follow the instructions in the "How to Give Online" section below or in the portal.

**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 & INDIVIDUAL AWARDS

#### Per Capita Awards (agency)

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

This calculation is 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 & Torchbearer Givers (individual)**

Champion givers are state employees who contribute one-half hour's pay or more per pay period. Torchbearers contribute at least \$1,000. An employee may receive one or both of these distinctions.

#### 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 2023-2024 to the 2024-2025 campaign (does include special event giving).

#### **Champion Award (agency)**

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

Note: Awards are given on an agency-by-agency basis. As Coordinators, you may also recognize divisions of your agency for outstanding performance.

#### IMPORTANT NOTE ABOUT EMPLOYEES ON AGENCY REPORTS



Employees are assigned to agencies by the State of Indiana. America's Charities receives employee information in mid-July and it's not updated again until the end of the campaign when the final reports are created. If an employee is not showing up on your agency list (or is showing up and shouldn't), please note that reports will ONLY show designated employees of your agency, which is determined by the State of Indiana. America's Charities is NOT able to make any changes to employee agency assignments or designations.

# SPECIAL EVENTS

There are statewide events planned for each week of SECC that are sponsored by a State of Indiana agency. You can also host your own special events. These events can be open to other state employees or only for your agency's employees

#### Getting started:

Depending on the size of your agency, it's ideal to recruit a committee of 5-7 people (from central office and field as applicable) to help execute events. The committee will brainstorm, handle promotion, do set up/tear down, get any necessary agency approvals, select the agency charity, secure events spaces (see below for instructions on requesting rooms from IDOA), etc. They'll also need to secure any necessary materials for the event as INSPD does not provide materials.

- If you need to set up one-time special event page for your event, submit the <u>Cognito form</u> to America's Charities so they can create the special event page and accompanying payment portal through Give Lively. **Processing can take up to a week** so we recommend submitting request at least two weeks in advance and America's Charities will send you the link and text code for donations once the site is complete.
- When promoting your event, flyers should only be hung on solid surfaces (not on painted or stained surfaces) and can't be hung facing the exterior or on exterior doors. You're also responsible for removing flyers in a timely fashion once the event is over.

#### Important guidelines to keep in mind:

- No gambling (this includes raffles, but auctions are allowed).
- No alcohol sales.
- No soliciting donations from private businesses.
- Participants and attendees must attend on their own time (not state time) which could mean attending on a lunch hour or flexing time as allowed by the employee's agency.
- Coordinators may use state time if they're working/running an SECC special event.



#### Questions to ask yourself when planning an event:

- Do we need an event website?
- Do we need to reserve space from IDOA?
- o Do we need volunteers to run the event or donate items?
- Will this event be internal only or promoted to other agencies to participate?
- Is there a deadline for signing up?
- How much do items/participation cost?
- o What's the projected profit/is it worth the time and effort required?
- Which charity will the funds go to?
- If it's an outdoor event, do you have a rain plan?

#### Reserving space from the Indiana Department of Administration (IDOA):

You'll need to submit requests with IDOA for spaces outside of your agency's office such as conference rooms, the space outside of the IGC-S cafeteria, Robert D. Orr Plaza, etc. You must have a <u>Standard Use Agreement</u> signed and on file at the Conference Center before submitting a room request and only need to do that part of the process once. Please submit the use agreement at least 24 hours before a room request form (only the person listed on the agreement can submit a room request). You'll then submit a <u>room request form</u> for each event to <u>Conference@idoa.IN.gov</u>.

If tables/chairs are requested for events, plan to sign out tables/chairs and transport equipment to the desired location. The cart needs to be returned immediately and picked up again to return the tables/chairs.

#### Submitting money from events:

SECC does not use paper pledge forms and prefers for donations to be made online. 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. All of the options for submitting money are as follows:

- 1. **One-time special event pages:** This is the best way to submit money during the campaign. These pages are only open for the duration of a single event during the campaign and allow any employee to pay through the accompanying payment portal. Instead of having to collect money yourself, it goes straight to America's Charities to be added to the campaign total.
  - It takes approximately one week for these pages to be created so we recommend requesting them two weeks ahead of most event so you can include the site in promotional materials as needed (instructions to request are below). The fee for making donations through this page are:
    - 1. 0.8% (cap of \$5) for ACH/Bank Transfer
    - 2. 2.2%+\$0.30 for most major credit cards
    - 3. 3.5% for American Express cards.



- 2. **Coordinator-only special event page**. You can also deposit cash or funds from sites like Venmo into your own account and then use your personal payment method on the coordinator-only special event page. This page is only for coordinators to use and is live for the entirety of the campaign. The fees for this page are the same as the one-time special event page.
- 3. The last option is to deposit the cash collected at an event and send a check to make your contribution. You MUST complete the <u>Special Event Check Submission Form</u> PRIOR to mailing any checks.
  - Make checks out to: America's Charities-Fiscal Agent
  - 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 agency's totals.

#### Requesting a one-time special event page

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.

- Please allow up to a week for processing (we recommend submitting a request two weeks prior to your event when possible),
- You're welcome to submit for multiple events at the same time, but please submit a new request form for each event.
- The code will provide donors with a link to a unique, mobile-friendly giving page that is specific to your event. <u>Click here</u> to see an example.

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

- Event start, end date and 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 so 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 percentage of event donations will be allocated to each designated charity.
- Event fundraising goal (optional)



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. Here are some more tips to keep in mind:

- In promotion of the 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," on your agency's final report.

# ADDITIONAL TIPS FOR SUCCESS

- 1. Get top level support
  - a. Meet with your agency head or department supervisor; get agreement from them 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 and try to raise 5-10% more than the previous 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 increases your Agency's chance of being a Champion Agency.

#### 5. Promote the event

- a. To have your event included in Around the Circle (which goes out every Wednesday), email Veronica Woodcox (<u>VWoodcox1@spd.in.gov</u>) with details by the prior Monday.
- b. To have your event included in the SECC email that goes out every Monday, email <u>spdcommunications@spd.in.gov</u> by the prior Wednesday.
- c. Find Canva templates for event flyers that you can edit <u>here</u> (you'll need to create a free account to view/edit them).

#### 6. Target special giving groups

- a. See "Agency Awards" section for additional details.
- 7. Keep your efforts to the point and maintain enthusiasm throughout
  - a. Follow through, report results, SAY THANK YOU to donors, volunteers, etc.
  - b. Make sure every employee has been reached.



# HOW TO GIVE ONLINE

# **MAKE YOUR PLEDGE IN FIVE EASY STEPS!**





#### State employees who participated in the 2023 SECC Campaign

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

- Are <u>happy with your current giving</u> (dollars pledged and causes supported), **no action on your part is required**. Your pledge will automatically roll over for the 2024 SECC campaign.
- Want to <u>check on or modify your pledge</u>, you may do so on the new giving portal using the **instructions below**.
- Check and discover your rollover pledge is <u>not designated to any specific organization(s)</u>, 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.

Home Give - Events

**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 2023 SECC Campaign

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.



Sign In & Register

# Step 1: Login and Setup Your User Profile

- To get started, visit <u>www.charities.org/secc</u> and click the blue and yellow "Donate Now" button. You'll be taken to the "Log On" page.
- 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** <u>NOTE:</u>

rd" Please enter your username and password. Register if you don't have an account. Lost your Password? User Name or Email Password Remember Me Sign In

Log On

Passwords are case sensitive and must be all lowercase. Do <u>not</u> include special characters such as #, \$, !, etc.



- Once you're logged in, your username will display in the upper right corner of the screen.
- For login assistance, contact the Help Desk at <u>secchelp@charities.org</u>, call (703) 957-7888, or visit<u>www.charities.org/support</u>
- 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.

#### **Edit Profile** Your pledge so far: \$0.00 Contacting Preferred Email thibby@charities.org Profile Information O CANCEL AND START OF h.hm. Prefix MOC BibbyTest1 Address Information Address Line 1 Enter Address Line 3 Address Line 2 Enter Postal Cod stal Code City

#### Donors WITH Giving History:

If you participated in the 2023 SECC Campaign, 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.



<u>NOTE:</u> 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 roll over.**
- b. You gave to a charity that is not eligible to participate in the 2024 SECC campaign. Participating charities must be verified to have a 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, <u>click here</u> or contact Caroline Bailey, Indiana United Ways: 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 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. 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, go back and select a different payment method, for example "Credit Card," then choose the charities you want to support by credit card, and complete the donation process for those charities.



#### **Payroll Deduction:**

- The amount you enter is the amount you would like deducted from your paycheck <u>each pay period</u>.
- 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.

- Payroll		\$0.00 ×	Your pledge so far:
Recurring payroll deductions will be Amount Per Period Pay Periods	deducted from your first paycheck in January	2020.	\$312.00 TOTAL ANNUAL GIFT Payment Methods:
	O Add payment method		\$ \$312.00 PAYROLL \$12.00 × 26
< Previous		Continue >	O CANCEL AND START OVER

- 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.
- 4. 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 either calculate their Champion amount manually or cancel the pledge in progress and begin a new one.
- 5. In the next step, you will allocate the total annual gift amount between your designated charities.

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

- The amount you enter is the <u>total annual gift</u> 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.



<ul> <li>Credit Card</li> </ul>				\$0.00	×	Your pledge so far:
All credit card fees will incur a per to	ransaction fee of	3.5% by your carrier.				\$500.00
Total Annual Gift	\$ 0					TOTAL ANNUAL GIFT
	\$10.00 minimu	n				Payment Methods:
Credit Card Type	○ Visa ○ Master0	ard				\$ \$500.00 CREDIT CARD
	<ul> <li>America</li> <li>Discove</li> </ul>	nExpress r				
Credit Card Number						CANCEL AND START OVER
Credit Card CCV						
Expiration Date	Month	1 -	Year	19	·	
	Add pay	ment method				
< Previous				Continue	>	

#### **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 information, click the icon next to "Bank Account."
- 3. 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

Search by Charity Name	
Write-In	
	Wri



# To find charities to support: Click the "Find a Charity" button.

Search by Charity Name	R	ALS	R	8
Search by City	Alpha's Glov Ones Pregnancy C	ALE Association, District of Colu	ALS Association-DC/MD/VA Cha	Alzheimer's and Aging Research
Search by State/Territory	8		6	8
Select	Alzheimer's Association - National	Alzheimer's Disease Research	Alzheimer's Disease Research Fo	Alzheimens Foundation of America
learch by EIN				
	H4 1 2 3 4 0 5 7 8 0	10		22 40 41 200 1
Recommended agencies	H4 1234 <b>3</b> 6789	10 > M		33 - 40 of 728 ite
Recommended agencies Search ected Charities Abheimer's Foundation of America	1 2 3 4 <b>3</b> 6 7 8 9	10 > M		33 - 40 of 728 Ite
Recommended agencies Barch Acted Charities Addeimen's Foundation of America	H 4 1 2 3 4 <b>(3)</b> 6 7 8 9 Herida of Animois	10 > M		33 - 40 of 726 Iter
Recommended agencies Search Acted Charities Addeemer's Foundation of America	H 4 1 2 3 4 <b>(3</b> 6 7 8 9) Triends of Animals	10 > M		33 - 40 of 726 Ite
Recommended agencies sected Charities Abheimer's Foundation of America	₩ • 1 2 3 4 <b>③</b> 6 7 8 9	10 : • M		33 - 40 of 728 ite

- 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. You can typically find EINs at https://www.guidestar.org
- 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."
- Click the orange "Add to Designations" button. The organization(s) you selected will now display on your list of designations.
- 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.

Name	Enter the charity's name
Phone Number	[
Web Site URL	http://www.domain.org
EIN	Enter Federal Employer ID Number
Street Address	Enter street address
City	Enter City
State/Province	Enter State
Postal Code	Enter Postal Code



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

- 1. 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.
- 2. 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.
- 3. When you have finished allocating your donation between charities, click "Next Step."

go?			\$	312.00
To begin, click 'Find a C directory	harity' to access the on	line charity	Payment Me	thods:
Note: In the green bar be amount. Please enter th	elow, you will see your t e total annual gift amou	otal annual gift nt you would like	6	\$312.00 BAYROL BTR/00.x
o designate to each of y nay also use the sliding	your chanty(les) in the b tools to designate your	oxes below, You desired	Designations	u.
percentage to each char preakdown of your gift t	rity(ies). To the right of y hrough the Maryland Ch	our screen is the arity Campaign.	M AL	\$200.00
	\$312.00			\$112.00
Select your designation	preference below.			FRENDS OF ANIMAL
		8		
©AFA.	64%		O CANC	EL AND STAFT OVER
CAFA Alzheimer's Foundation of Amarica	64%)	\$ 200	0 CANC	EL AND START OVER
Alstheimer's Foundation of Amatica	64%	\$ 200 \$	0 CANC	EL AND START OVER
Alzheimer's Foundation at Amarica	64% 30%	<ul> <li>200</li> <li>200</li> <li>201</li> <li>201</li></ul>	0 CANC	EL AND START OVER
Asheimer's Foundation of Amarica Friends, of Annuals	64% 30%	<ul> <li>200</li> <li>200</li> <li>201</li> <li>202</li> <li>203</li> <li>204</li> <li>204</li></ul>	O CANC	EL AND START OVER



# Step 4: Submit Your Pledge

 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.

1 2 3 4 REVIEW GIFT	Impersonating: Alysia Test Stop
Review and complete gift	Your pledge so far:
By checking this box, I choose not to release my contact information (name, mailing address or email address) to the charity(ies) designated.	\$260.00 TOTAL GIFT
By checking this box, I choose not to release my contact information (name, mailing address or email address) to the public where it could be viewed in an Annual Report, newsletter, on printed or electronic materials, or a website.	Payment Methods: \$260.00 SUSTAINED RECURRING PAYROLL PUCTION \$10.00 x 26
	Designations:
Previous Finish >	\$260.00 ALEX'S LEMONADE STAND FOUNDATION
	CANCEL AND START OVER

- 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 any time during the campaign enrollment period. To cancel or modify a credit card or electronic check donation, please contact America's

Choose your gift options	Your pledge so far:
Select one of the following to give:	\$26.00
Modify a Gift from This Campaign Gift and Designations	Payment Methods:
Select the current gift you want to modify:	\$ \$26.00 SUSTAINED RECURRING PAYROLL DEDUCTION S1.00 × 28
© 2021 Gift 1: <b>\$26.00</b>	Designatione
PAYMENT TYPES:	Designations.
S Sustained Recurring Payroll Deduction \$26.00	\$26.00
DESIGNATIONS:	INDIANAPOLIS
♥ \$26.00 to 100 Black Men of Indianapolis	
AFFINITY GROUPS:	CANCEL AND START OVER
YOUR INFORMATION:	
O Do not release to charity	
O not release to public	

Charities at secchelp@charities.org, (703) 957-7888.

- 1. Log into the pledge site and click "Donate Now."
- 2. You will be given two options:
  - a. **"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.

- 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, (703) 957-7888, or www.charities.org/support
- b. **"Start a new gift and designation."** Select this option if you would like to make a new credit card or new payroll donation.

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."
- If you do not modify your undesignated pledge, it will remain classified as "undesignated" until you modify your gift in a future campaign.
- 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 2024.

**<u>Need Help?</u>** For assistance, please:

- Email: <u>secchelp@charities.org</u>
- Call: (703) 957-7888
- Visit: <u>www.charities.org/support</u>





## **RETRIEVING TAX INFORMATION**

Contributions to SECC are tax deductible within the limits allowable by Federal and Indiana State law. 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, after 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.

