



Philly Gives Together

Captain's Training Manual

September 12 – November 25, 2022



The City of Philadelphia 2023 Employees' Combined Campaign

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September 12 – November 25, 2022

Thank you for serving as a Captain of the [City of Philadelphia 2023 Employees' Combined Campaign](#), the City's workplace charitable giving program. **We are grateful for you.** Your leadership and commitment to public service is what sets this Campaign apart. Since 1983, Philadelphia employees have raised more than \$38 million for impactful nonprofits through the Combined Campaign. That collective generosity is incredible, and it could not have been achieved without the staunch support of Captains.

Yet the need is greater than ever. The COVID-19 pandemic has strained every public resource available and the nonprofits serving our communities are stretched thin as they struggle to fulfill ever-increasing demands with ever-dwindling resources. With your help, Philly's employees will bring vital funds to the causes that support the most vulnerable among us through the Combined Campaign.

This year's goal is to raise \$400,000. 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 Captains can make the most impact. **We need your help to invite every single employee, without coercion, to contribute to causes they love.** This Captain's Manual is designed to support you in that endeavor. In the following pages you will find key information to help you succeed in your leadership role as Captain.

Campaign Overview

The City of Philadelphia 2023 Employees' Combined Campaign gives City employees the opportunity to contribute to charities they care about in order to positively impact communities across Philadelphia and beyond.

Fast Facts

- The 2023 Combined Campaign runs **September 12 – November 25, 2022**.
 - All **pledge forms** are due by **December 9, 2022**; we will not accept pledge forms after.
 - **Online** giving is available from September 12 until the end of day on **November 25, 2022**.
- The Campaign **website**, and starting point for all employees, is www.phila.gov/combinedcampaign. The giving portal, accessible from the Campaign website, is <https://bit.ly/phillygive>.
- Mark your calendar! Please plan to join our **VIRTUAL kick-off** celebration **on Tuesday, September 12 at 11am**. Soon you will receive an email with a registration link and additional details.
- 12 federations and funds and their charity members are participating this year, as well as a group of unaffiliated charities vetted by America's Charities.
 - In all, donors may choose from any of the more than **300** individual participating **charities**.
 - Each charity has been pre-vetted by America's Charities and meets eligibility standards.
- This year's **goal** is **\$400,000**. With your help, we can do it!
- City employees may give using the convenience of payroll deduction, credit/debit card, or check.
- **Contract employees** (those without a city-issued employee ID) may make one-time donations to the campaign via check or credit card. Checks from contract employees should be submitted in the same way employee checks and pledge forms are. If a contract employee would like to make a one-time donation using a credit card, they can do so using [THIS SITE](#).
- The Captains' job is to solicit non-coercively 100% of eligible donors—all employees paid through central payroll and all quasi departments. Your goal is to **ask everyone**.
- The 2023 Campaign **theme** is the same as last year: **Philly Gives Together**.
- We will have a **prize drawing each week** of the Campaign. See the prize information on page 5 for additional details.
 - Any donor who gives \$5 or more per pay period is eligible for the drawings.
 - Donors stay in the running until they win or the Campaign ends.
- The 2023 Campaign Co-Chairs are Mike Zaccagni, Chief Human Resources Officer for the City of Philadelphia, and Kimberly Ali, Commissioner, Department of Human Services.

Message from Mike Zaccagni, 2023 Co-Chair

I am excited to serve as Co-Chair of the 2023 City of Philadelphia Employees' Combined Campaign! In the 30 plus years I have served the City of Philadelphia, I have come to understand how essential our local charities are for providing critical services to the residents of Philadelphia, and many of us have witnessed first-hand the many ways in which our city is improved by their work.



The COVID-10 pandemic has put charities in a precarious and difficult position, as the need for the most basic of human services has increased exponentially, while resources have continued to dwindle. Many organizations have had to close their doors, leaving citizens desperately in need. As we kick off the 2023 Combined Campaign, I ask you to please open your hearts and consider supporting the most important work of our charities, so that they may continue to support and uplift the most vulnerable among us.

As we slowly emerge from years of hardship and isolation, it is my hope that we can come together to give together as coworkers and Philadelphians; continuing to support the Combined Campaign and the many charities it supports. If you are able to give, I hope that you will. **Every dollar makes a difference**, and every gift, no matter how small, will help create a brighter future for Philadelphia, and for us all.

With gratitude,

Mike Zaccagni

Director of Human Resources, City of Philadelphia, 2023 Combined Campaign Co-Chair

Message from Commissioner Kimberly Ali, 2023 Co-Chair

I am honored to be your Co-Chair for this year's Combined Campaign, and I am grateful for the opportunity to lead and inspire my fellow city employees and colleagues in supporting the Campaign, and the many local charities who benefit greatly from our efforts.



Times are increasingly challenging for communities such as ours. As DHS Commissioner, I have seen the devastating effects the COVID-19 pandemic has had on our families and children. As the federal government begins to roll back COVID safety nets and assistance programs, local organizations must step up to provide crucial services and resources. Charities, non-profits, and community organizations are charged with supporting our residents in the struggle for daily living. Your contribution to the Combined Campaign ensures that these organizations may continue their work, making Philadelphia a city of resilience and compassion.

Giving connects us with our fellow neighbors – from senior citizens in need of securing their benefits to school children having after school programs. Our contributions help immigrants get organized, workers fighting for better wages, women accessing homeless shelters, and cultural programs impacting our youth. When we give together, we connect in very meaningful ways.

Thank you in advance for your generosity, and for taking the time to connect and give. Our city and our region improve every day because of the work you do on your job to serve people. Your donations supporting the organizations and charities on the front lines continue to demonstrate that we are truly a city of brotherly love and sisterly affection.

Thank You!

Kimberly Ali

Commissioner, Department of Human Services, 2023 Combined Campaign Co-Chair

Campaign Management Organization

As they have for the past several years, [America's Charities](https://www.americascharities.org/) – a nonprofit which inspires employees and organizations to support each other and the causes they care about – is the Campaign Management Organization (CMO), in charge of planning and implementing the Combined Campaign, supporting Captains, and managing donated funds. The CMO works with you and other Captains to develop and execute fundraising strategies and ensure the Campaign's success. You may reach Becky Marx, the lead Campaign Manager, any time at bmarx@charities.org or 215-586-3299.

Captain's Role and Responsibility

Your responsibility as Captain is to educate your co-workers about the Combined Campaign and invite them to participate. You may engage your co-workers in groups or individually to solicit pledges, or organize volunteers to engage multiple units or locations. Captains set departmental goals, distribute supplies, organize fundraising events, assist donors with their donations both online or by pledge form, and generally provide project management and administrative support. Below is the overview of a Captain's role and responsibilities:

- Attend Campaign training
- Engage employees, educate your co-workers on the benefits of the Campaign, invite them to give
- Provide visible support for the Campaign; promote and publicize the Campaign
- Keep in contact with Becky Marx, the Campaign Manager; monitor progress and offer assistance and encouragement to other Captains
- Collect any paper pledge forms, make sure they are filled out correctly, and turn them in with completed batch form to the **designated drop off locations at Window 18 or MSB Room 1530**. You can also mail them c/o America's Charities at 14200 Park Meadow Drive, Suite 330S, Chantilly, VA 20151

Talking Points: Why Give Through the Campaign

- The City of Philadelphia 2023 Employees' Combined Campaign is a way for City employees to make a difference in communities across Philly and beyond.
- Funds help feed the hungry, shelter the homeless and animals, protect our environment, assist youth and the elderly, and much more.
- More than 300 charities are eligible for your donation.
- Set it and forget it; pledge now and pay in 2023.
- Payroll deduction allows you to have a big impact without taking a big chunk out of your bank account, since you can take a little bit out of each paycheck all year long.
- Raising funds through the Combined Campaign is the most effective way for a charity to raise sustainable support for its programs and services. Since the Campaign is a single, coordinated appeal, rather than hundreds of individual fundraising drives, it significantly reduces the administrative burden on charities.

Talking Points: Why Give Now

Last year was particularly crushing for the charitable community. From the very start of the COVID-19 pandemic, nonprofits were there, on the ground, providing critical relief and support to people, families, and communities across Philadelphia and beyond — especially those hardest hit.

There was no time to fundraise or scale up to deliver those programs. Charities had to act immediately. To do so, most had to redirect their resources to cover those costs – all the while, foregoing important fundraising and partner development events that would normally help sustain their programs.

Even as you read this, demand for charities' programs and services continue to surge. The charities participating in the Combined Campaign are struggling to fulfill ever-increasing demand with ever-dwindling resources. They need our help.

Distributing Campaign Materials

At the start of the Campaign, you will receive the following materials, which you will need to pick up. You should share with the employees of the departments to which you're assigned. It is vital that you distribute materials to every employee with whom you come in contact. These materials are also available on the website, www.phila.gov/combinedcampaign, and giving portal, <https://bit.ly/phillygive>:

- **Contributors' Guide:** includes messages from this year's Campaign Co-Chairs Mike Zaccagni and Commissioner Kimberly Ali; the charity code directory, listing all causes and their affiliated code; help and support information; and the pledge form instructions.
- **Pledge forms:** One for each employee (pledge forms will NOT be pre-populated with employee names and ID numbers)
- **Batch forms:** You can use any inner office envelope
- **Catholic Charities Appeal Parish forms:** For contributions to 21-0000 (individual parishes can also be designated through the online giving portal)

Five Steps to Plan Your Campaign

1. Develop a Plan

- **Establish a Campaign timeline** for your fundraising activities. This year the Campaign will run September 12-November 25, 2022. Plan your activities early.
- **Set goals** based on past Campaign results and dollars/percent participation. Ask the CMO for your department's history.
- **Implement strategies to meet your goals.** Ask your Department Manager to assist. If needed, speak with the CMO lead about the best way to utilize your time and efforts and decide what works best for your department.

2. Establish Support from the Top. Work with Top Management to:

- Endorse the Campaign through emails or speak at virtual meetings.
- Attend Campaign events and invite your department employees.
- Thank and recognize volunteers and donors throughout the Campaign.

3. Recruit a Team (Co-Captains)

- Find enthusiastic employees who support the Campaign to serve on your team to:
 - Attend trainings with you.
 - Assist you in Campaign planning.
- When planning your Co-Captain trainings, ask for a charity speaker to attend and give a virtual five-minute presentation.
- If you have employees at multiple locations, it is best to have a Co-Captain located at each.

4. Promote and Educate

- At your next department staff meeting, schedule the CMO lead, Becky Marx, to speak for five to seven minutes or help you schedule a charity speaker.
- Publicize your Campaign dates and events through emails, employee newsletters, bulletin boards, etc. – contact the CMO lead to leverage charity impact and dollar-buy statements.
- Schedule a kick-off event.
- Have your commissioner or director send a general endorsement email to all employees.
- Provide incentives for donating online at specific intervals.

5. Make the Ask and Say "Thank You"

NOTE: The #1 reason people do not give is because they were never asked. Please ask everyone!

- Send a personal "thank you" note to your Campaign team
- Have top management send organization-wide thank you(s) and acknowledgement emails

Six Tips for Success

1. Your goal is to ask everyone.

- Giving every person the chance to contribute and share in the City of Philadelphia 2023 Employees' Combined Campaign will consistently strengthen the Campaign with each passing year.
- However, stress to solicitors that coercing employees is unacceptable, and can only hurt the Campaign.
- No one is required to give; giving is a choice, not an obligation.

2. Make your pledge first! If your co-workers know that you believe in and support the Campaign, they're more likely to pledge.

3. Promote the Campaign by publicizing group meetings and special events – have FUN with the Campaign!

4. Work with the CMO. Becky Marx and the America's Charities team are here to answer your questions, provide materials, strategize with you, etc.

5. Be positive and explain the benefits of giving to a charity through the workplace. Stress the importance of each person's contribution to the community and how every gift makes a difference.

6. Say thank you. Whether your co-workers indicate they will make a gift or not, thank them for their consideration.

Incentives: Weekly Drawing and Prizes

There are several incentive items being offered as a way of thanking donors for their participation in the Campaign, including a **Combined Campaign Prize Contest**. When you donate \$130 (that's just \$5 per pay period!) or more to the Combined Campaign, you will automatically be entered in this year's weekly prize drawings! Prizes this year include gift cards, branded and autographed items from our local professional sports teams, tickets and more! Visit www.phila.gov/combinedcampaign for prize details and winners throughout the Campaign.

Charity Speaker Request

Plan your meetings or charity fairs in advance. Contact the CMO lead, Becky Marx, to help schedule a speaker for your virtual event. To request a speaker for your campaign event, please visit this link: [CHARITY SPEAKER REQUEST](#) to submit your event details. Requests should be submitted at least two weeks prior to your campaign event.

Donor Giving Instructions

1. Online: Payroll deduction, credit/debit card, electronic check
2. Pledge Form: Payroll deduction, check, credit card

Online Giving Is Best (and SO EASY!)

PLEASE NOTE: Every effort should be made to encourage employees to give online through the [giving portal](#), rather than through pledge form. We are able to more quickly and accurately process online donations and calculate Campaign progress and totals. Plus, online giving provides the donor with an immediate tax receipt and enables their pledge history to be online in subsequent years. Pledge forms are available only for those without access to the internet.

We recognize change is hard and some have used pledge forms for years, but this is where your expertise comes in. Please become familiar with the giving portal, <https://bit.ly/phillygive>, so that you can help others. America's Charities is here to support you – there are no bad questions! Please use this manual as a resource and feel free to contact the Campaign Manager, Becky Marx, at bmarx@charities.org or 215-586-3299, if you need anything. We welcome your feedback and comments on the management of the Campaign.

Online Giving Instructions



Login and Setup Your User Profile

1. Click **"Sign in"** from the top right corner of the site and enter the following credentials:

City Employees:

Username = First Initial of First Name + First Initial of Last Name + Employee ID

(Example: A person named John Doe with the Employee ID of 123456 would use the username **JD123456** or **jd123456**)

(*Note: Enter information as it appears on your pay stub. No space between names and not case sensitive.*)

Password = P + Employee ID (Example: **P123456**)

(*Note: Password is case sensitive. "P" should be capitalized. Enter ID as it appears on your pay stub.*)

Quasi Employees:

Username = First Initial of First Name + First Initial of Last Name + Unique ID (Example: **JD234567** or **jd234567**)

(Note: Enter information as it appears on your pay stub. No space between names and not case sensitive)

Password = P + Unique ID (Example: **P234567**)

(Note: Password is case sensitive. "P" should be capitalized. Contact your payroll office to obtain your Unique ID.)

2. Once you are logged in, your username will display in the upper right corner of the screen.
3. Click **"Give Now"** to start the pledge process online.
4. First, you will 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.
5. Select "Continue" when you have finished updating your contact information.



Select a Payment Method

You may support your favorite nonprofits via Payroll Deduction or a one-time donation by credit card.

1. Click **"Add"** to choose your payment method.

Payroll Deduction:

Enter in the amount you would like to pledge per pay period.

As you enter in the per pay period amount, you will see the annual amount you are pledging on the right under "Your pledge so far."

Note: The City of Philadelphia Combined Campaign requires donors to give a minimum of \$2 per pay period per charity (\$52 per charity annually).

A screenshot of a web dialog box titled "Choose a payment method by clicking its Add button to set up gift payments." It contains two options: "Payroll" (Payroll based payment method) and "Credit Card" (Credit card based payment method). Each option has an orange "Add" button. A "Close" button is at the bottom right.A screenshot of the "Set up gift payments" page. The main section is titled "Set up gift payments" and "Choose and edit one or more gift payment methods". It shows a "Payroll" method selected with a value of "\$0.00". Below this, there is a "Please Note" section stating that donors must give a minimum of \$2 per pay period per charity. There are input fields for "Amount Per Period" (with a dollar sign icon) and "Pay Periods" (set to 26). At the bottom, there is an "Add payment method" button. On the right side, a sidebar shows "Your pledge so far:" with a total of "\$0.00" and a breakdown by "Payment Methods:" showing "\$0.00" for "PAYROLL". At the bottom of the sidebar is a "CANCEL AND START OVER" button. The main page has "Previous" and "Continue" navigation buttons.

Credit Card:

This will be a one-time credit card gift. All credit card fees will incur a per transaction fee of 3.5% by your carrier. Credit card transactions are immediate. In the event of an error, you will need to contact your credit card company to cancel the transaction.

Set up gift payments

Choose and edit one or more gift payment methods

Credit Card

\$0.00

All credit card fees will incur a per transaction fee of 3.5% by your carrier.

Total Annual Amount

\$ 0

Credit Card Type

☐ Visa

☐ MasterCard

☐ AmericanExpress

☐ Discover

Credit Card Number

Credit Card CCV

Expiration Date

Month

1

Year

18

Add payment method

Previous

Continue

Your pledge so far:

\$0.00

TOTAL GIFT

Payment Methods:

\$

\$0.00

CREDIT CARD

CANCEL AND START OVER

2. **Once you have selected the amount you would like to pledge per pay period or by one-time credit card payment, and you agree with the annual total you are pledging to the right under “Your pledge so far,” click “Continue” to find charities to support.**

Set up gift payments

Choose and edit one or more gift payment methods

Payroll

\$130.00

Please Note - The City of Philadelphia 2019 Employees' Combined Campaign requires donors give a minimum of \$2 per pay period per charity.

Amount Per Period

\$ 5.00

Pay Periods

☒ 26

TOTAL:

\$130.00

Add payment method

Previous

Continue

Your pledge so far:

\$130.00

TOTAL GIFT

Payment Methods:

\$

\$130.00

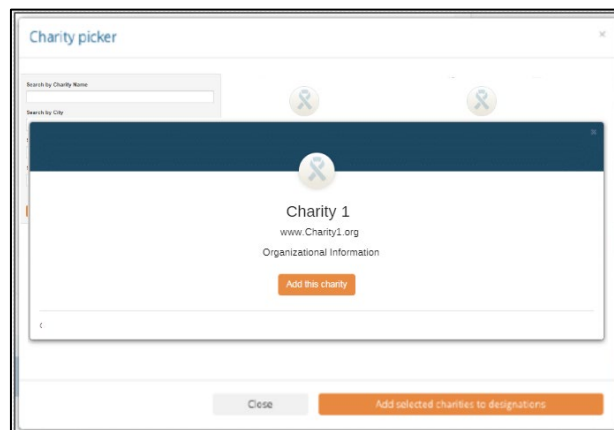
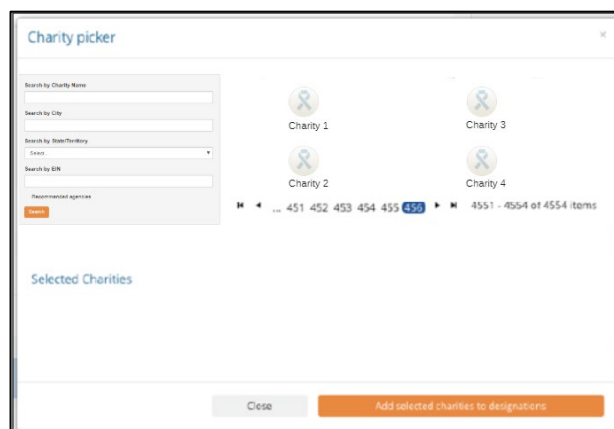
PAYROLL
\$5.00 x 26

CANCEL AND START OVER

Step 3

Choose Your Favorite Charities to Support

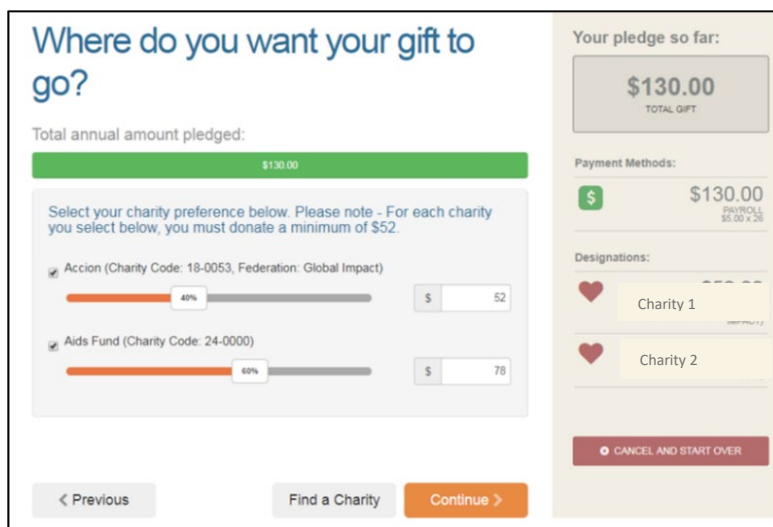
1. To find charities to support, click the “Find a Charity” button.
2. The Charity Picker screen will appear. Search by charity name, city, or state, or filter by federation to find a specific organization, or click through the alphabetical list.
3. You can select as many charities to support as you would like. As you find charities you want to support, click “Add” and they will appear highlighted in blue under “Selected Charities.”
4. Click the orange “Add selected charities to designations” button. The organization(s) you selected will now display on your list of designations.
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.



Want to Change the Total Pledge Amount for Your Charity Designations?

The amount you selected during the payment method step will be allocated between the charities you have selected. **Please Note: You must give a minimum of \$52 to each charity annually.**

To adjust the total 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 designated nonprofits, click “Continue.”



The screenshot shows the 'Where do you want your gift to go?' screen. It displays the 'Total annual amount pledged' as \$130.00. Below this, there are two charity options with sliders and input boxes for allocation: 'Accion (Charity Code: 18-0053, Federation: Global Impact)' with a 40% slider and a \$52 input box, and 'Aids Fund (Charity Code: 24-0000)' with a 60% slider and a \$78 input box. On the right, a summary box shows 'Your pledge so far: \$130.00 TOTAL GIFT'. Below this, it shows 'Payment Methods: \$130.00' and 'Designations: Charity 1, Charity 2'. At the bottom, there are buttons for '< Previous', 'Find a Charity', 'Continue >', and a red button for 'CANCEL AND START OVER'.

Step 4 Submit Your Pledge

You will have one final chance to review your gift and designations, and you will also be able to select whether your gifts remain anonymous or if you grant permission to have your contact information shared with the charity(ies) you supported through this Campaign.

Click “Finish” to submit your pledge.

Review and complete your gift

☐ By checking this box, I choose not to release my contact information (name, mailing address or email address) to the charity(ies) designated.

☐ 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.

< Previous
Finish >

Your pledge so far:

\$130.00

TOTAL GIFT

Payment Methods:

\$

\$130.00

PAYROLL \$5.00 x 26

Designations:

♥

\$52.00

Charity 1

♥

Charity 2

CANCEL AND START OVER

Step 5

Repeat this Process to Modify Your Donation

Credit card transactions are immediate. In the event of an error, you will need to contact your credit card company to cancel the transaction. However, if you would like to edit a payroll donation, you may do so.

1. Log into the Campaign website and click “Give Now.”
2. You will be given an option to “Modify a gift from this Campaign”
 - Choose this option if you would like to edit a pledge you already submitted. By choosing to modify a gift, you will open your existing pledge to edit. You will need to complete all steps of the pledge process as outlined above to return the gift to a completed status.

Thank you for pledging through the Combined Campaign! **Philly Gives Together**

Pledge Form Instructions

The directions for completing the pledge form are included on the form itself. Please review carefully. For assistance, please contact help@charities.org or www.charities.org/support

Collect and turn-in pledge forms on a weekly basis. This is very important. The timely return of pledges means that payroll deductions can be promptly processed and helps us track the progress of the Campaign. Please make sure all batches of paper pledge forms have a **COMPLETED batch form**. This does not have to be placed on the front of the envelope but paper clipped to the batch of paper forms you are turning in. When pledges are collected they need to be placed in an envelope or an interoffice envelope marked for the Combined Campaign.

Captains and Co-Captains please make sure all department information is on the form.

- If an employee wants to donate to more than five (5) charities they can use a second pledge form, and check the box in the upper right hand corner. Then fill in all of their information including their employee ID number, and paper clip together.

Captains and Co-Captains should review all pledge forms that are submitted. Please make sure:

- All employee information is included
- Ensure department number is entered and correct

- All payroll deductions need to be a minimum of \$2 per pay period, per charity. This is a City Payroll rule; they will not deduct from payroll for less than \$2 per pay period, per charity
- Ensure they have selected either payroll deduction or check as their payment method
- If an employee checked the “Checks” box, please make sure that check is attached to the pledge form made out to the “Combined Campaign” for the amount indicated
- Confirm pledge form is signed

To Return Pledge Forms

Campaign Co-Captains: You are to turn your report envelopes into your Campaign Captain. That is the individual who has given you your supplies for the Campaign.

For Campaign Captains: Report envelopes are to be taken to one of these locations:

- MSB Building, 1401 JFK, Lower Concourse, Window 18. Hours of operations 8 am-Noon.
- MSB Building Room 1530, Combined Campaign Desk.

Pledge Form Batching

Please make sure all pledge forms have been batched with a completed form attached to the pledge forms and not attached to the envelope.

Mailing Pledge Forms to the CMO: If you are mailing a batch directly to America’s Charities, make sure that the completed batch form was included with pledge forms. Please make sure you have made a copy of all pledge forms retained for your records and inform the CMO lead, Becky Marx at bmarx@charities.org, when the envelope is mailed.

Combined Campaign Captains will be able to batch and mail their pledges to: **America’s Charities, Attention: Philly Combined Campaign**, 14200 Park Meadow Drive, Suite 330S, Chantilly, VA 20151

Please make sure to have a completed batch form attached to the pledge forms. All instructions are on the batch form. Captains do not need a special envelope to drop off batched pledge forms. The only information needed on the envelope: Combined Campaign, department #, and name of Captain. **The batch form should be inside the envelope attached to the pledge forms.**

All checks or Money Orders need to be made out to “Combined Campaign” regardless of whether the employee donation is for one charity or more. Attach the check or money order to the pledge form.

NO CASH will be accepted. If your department had a fundraiser, cash needs to be converted to a check or Money Order made out to “Combined Campaign” and attached to a pledge form under your department number. On the pledge form, you can fill in the Charity Code for the organization your fundraiser supported.

Note that there will be a delay in including paper pledges in your department pledge totals, ***please allow at least 2 weeks for paper pledges to be processed.***

You can access your reports, including reports for your department, as well as the Contributors’ Guide and other materials as needed, on the giving portal. Please see below for instructions.

Captains’ Reports

America’s Charities Reporting Portal Guide Instructions

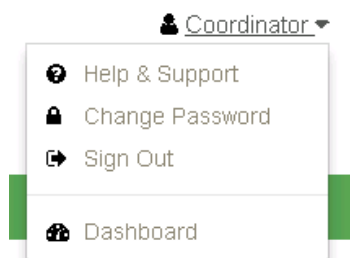
America’s Charities provides a robust reporting portal to help Captains be successful in charitable giving campaigns. The reports provide coordinators with the data they need to manage incoming pledges and track against goals.

User Access

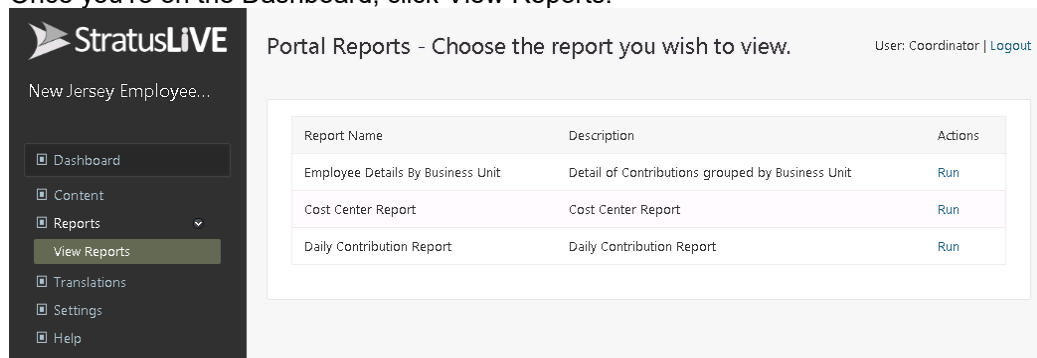
America’s Charities will work with you to determine who should have access and at what level. Coordinators can be limited to a single Business Unit, multiple Business Units, or can view the entire organization. A Business Unit can be an agency, department, team, etc. Business Unit access is hierarchal. For example, if an organization has an Accounting department, with Accounts Payable and Accounts Receivable teams underneath, a coordinator who has access to the Accounting department will have access to all data from both teams underneath.

Dashboard

To access reports, you'll need to login to the giving site. Once you're logged in, click your username in the top-right corner and choose Dashboard from the menu.



Once you're on the Dashboard, click View Reports.



Employee Details by Business Unit Report

This report provides pledge details for each donor, grouped by Business Unit. To run the report, select the options in the fields shown below. For the Sub-selection, if you choose *All* it will only show data for the Business Units that you have access to.

A screenshot of a web form for selecting report parameters. It includes three dropdown menus: 'Campaign Period' (set to 2018), 'Selection' (set to BusinessUnit1), and 'Sub-Selection' (with a list of options including *All*, Absecon Public School District, Atlantic Cape Community College, and Atlantic City School District). At the bottom, there are three buttons: 'View Report', 'Save Report', and a 'CSV' dropdown menu.

Once you've selected your option, click View Report. You can also choose to 'Save Report' as a CSV, Word, Excel, or PDF file.

Employee Details by Business Unit Report

Data As Of: 10/10/2018 5:21:27 PM

Page 1

Business Unit Name	Employee Id	Full Name	Suggested Gift	Current Total Gift	Previous Total Gift	New	Net Difference	Out-standing	Incomplete Contributions
IT	1234	James Anderson	\$0.00	\$1,000.00	\$0.00	Y	\$1,000.00	N	
	12345678	David Thompson	\$0.00	\$0.00	\$0.00	N	\$0.00	N	
	A123456789	Jenny Hampton	\$0.00	\$910.00	\$0.00	Y	\$910.00	N	
	Total		\$0.00	\$1,910.00	\$0.00		\$1,910.00		
Marketing	1234	Sarah Jones	\$0.00	\$0.00	\$0.00	N	\$0.00	N	
	12345678	Tom Smith	\$0.00	\$0.00	\$0.00	N	\$0.00	N	
	Total		\$0.00	\$0.00	\$0.00		\$0.00		
Sales	123456789	John Doe	\$0.00	\$3,134.00	\$0.00	Y	\$3,134.00	N	\$0.00
	Total		\$0.00	\$3,134.00	\$0.00		\$3,134.00		\$0.00
	Grand Total:		\$0.00	\$5,044.00	\$0.00		\$5,044.00		\$0.00

Cost Center Report

This report provides an overview of all Business Units. There are no settings for this report, just click 'Run' to view the report.

Cost Center Summary Report

Data As Of: 10/10/2018 5:18:34 PM

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Business Unit 1	Business Unit 2	Business Unit 3	Total Pledge	Num Emps	Num Donors	Percent Participation	Per Capita Gift	Average Gift
IT	N/A	N/A	\$1,000.00	3	1	33.33 %	\$333.33	\$1,000.00
IT	Help Desk	N/A	\$910.00	1	1	100.00 %	\$910.00	\$910.00
Marketing	N/A	N/A	\$0.00	2	0	0.00 %	\$0.00	\$0.00
Sales	N/A	N/A	\$3,134.00	1	1	100.00 %	\$3,134.00	\$3,134.00
Totals:			\$5,044.00	7	3	42.86 %	\$720.57	\$1,681.33

Need Help?

Contact the following for assistance:

- CMO lead, Becky Marx, at 215-586-3299 (cell), or bmarx@charities.org
- Donor support at 703-222-3861, dial "3" when prompted, or help@charities.org

6 Steps to Complete and Submit Your Paper Pledge Batch Form

Pledge forms should be submitted to your Captain weekly

INSTRUCTIONS

1. Review each pledge form for completeness and accuracy

- Make sure there is a signature
- Ensure the address is complete if included
- Make sure the correct pay period frequency is selected, and the pledge amounts are calculated correctly
- Verify per pay period deduction amount is correct
- Verify total annual gift amount is correct

Pledge forms that are incorrect or incomplete will not be processed.

2. Organize Pledge Forms

- Use a separate form for each department
- Sort pledge forms by pledge type:
 - Payroll Deductions
 - Personal Checks/Money Order – attach checks with the corresponding pledge forms
 - Fundraising Event – attach checks to the batch submission form

3. Complete the Paper Pledge Batch Submission Form for each type of donation: Payroll Deduction, Checks/Money Orders, and/or Fundraising Activities

- Complete the top section with:
 - Date: Use the date the pledge forms were collected
 - Batch number: Create the batch number (your department # _today's date)
 - Example: 01_10112018
 - For each batch submitted, the Captain will receive an email confirmation
 - If there are any errors, an email will be sent before the batch is processed
 - If the batch is prepared without errors, an email will be sent assigning the batch with a three digit identifier. This three digit identifier will serve as a way to track your batches throughout the Campaign
 - Example: 001_01_10112018
- Department name and number
- Captain's name and contact information

4. Complete Batch Summary Section:

- Enter the number of pledge forms enclosed in the batch and the total annual amount pledged

5. Complete the Final Section:

- Sign and date
- Submit completed form to America's Charities with the pledge forms and corresponding checks or money orders attached

6. Mail to America's Charities: (or drop off at one of the three locations listed)

- Philadelphia Combined Campaign, c/o America's Charities 14200 Park Meadow Drive, Suite 330S, Chantilly, VA 20151

Contact Becky Marx, at 215-586-3299 or bmarx@charities.org if you have any questions.



2022-23 City of Philadelphia's Combined Campaign Paper Pledge Batch Submission Form: **Payroll Deduction**

Please complete this form according to the instructions provided below. Thank you!

DATE	BATCH# (This is your department# _today's date, Example: 01_10112019)		
DEPARTMENT NAME		DEPARTMENT NUMBER	
CAPTAIN	EMAIL	PHONE	
PLEDGE FORM DELIVERY METHOD	MAILED TO AMERICA'S CHARITIES <input type="checkbox"/>	DATE:	
	DROPPED IN DROPBOX <input type="checkbox"/>	DATE:	

INSTRUCTIONS

For all paper pledge forms, group batches by same pledge type: Payroll Deduction, Personal Check/Money Order, or Fundraising Event Money. Tally the # of Individual Contributors and Total Annual Amount. Print and sign this form and submit this form with the paper pledge forms to America's Charities.

PLEASE NOTE: Submit only one type of pledge form per batch: Payroll Deduction, Personal Check/Money Order, or Fundraising Event. *Complete a new batch form with each submission.*

All checks should be made payable to Philadelphia Combined Campaign. Cash must be converted to A Money Order or Check. America's Charities will not accept cash.

SUBMISSION: Submit batches to one of two locations below.

- MSB-Concourse-Window 18
- MSB-Combined Campaign Desk, Room 1530

Remember: # of Individual Contributors must match the total paper pledge forms included with the report.

PAPER PLEDGES	<i>Only include one pledge type in this report. Enclose all required documents listed.</i>	# of Individual Contributors	TOTAL ANNUAL AMOUNT SUBMITTED IN THIS REPORT
Payroll Deduction	<i>(Ensure pledge form includes amount and is signed)</i>		\$

REMINDER CHECKLIST

Review each pledge form for:

- Entered Employee ID Number and Department Code #
- Entered Agency Code and Charity Name
- Accurate Per Pay Period Amount per Designation and is at least \$2.00 per pay period
- Accurate Total Pay Period Deduction Amount
- Signed and Dated

Captain Signature

Date



2022-23 City of Philadelphia's Combined Campaign Paper Pledge Batch Submission Form: **Personal Checks**

Please complete this form according to the instructions provided below. Thank you!

DATE	BATCH# (This is your department# _today's date, Example: 01_10112019)		
DEPARTMENT NAME		DEPARTMENT NUMBER	
CAPTAIN	EMAIL	PHONE	
PLEDGE FORM DELIVERY METHOD	MAILED TO AMERICA'S CHARITIES <input type="checkbox"/>	DATE:	
	DROPPED IN DROPBOX <input type="checkbox"/>	DATE:	

INSTRUCTIONS

For all paper pledge forms, group batches by same pledge type: Payroll Deduction, Personal Check/Money Order, or Fundraising Event Money. Tally the # of Individual Contributors and Total Annual Amount. Print and sign this form and submit this form with the paper pledge forms to America's Charities.

PLEASE NOTE: Submit only one type of pledge form per batch: Payroll Deduction, Personal Check/Money Order, or Fundraising Event. *Complete a new batch form with each submission.*

All checks should be made payable to Philadelphia Combined Campaign. Cash must be converted to A Money Order or Check. America's Charities will not accept cash.

SUBMISSION: Submit batches to one of two locations below.

- MSB-Concourse-Window 18
- MSB-Combined Campaign Desk, Room 1530

Remember: # of Individual Contributors must match the total paper pledge forms included with the report.

PAPER PLEDGES	<i>Only include one pledge type in this report. Enclose all required documents listed.</i>	# of Individual Contributors	TOTAL ANNUAL AMOUNT SUBMITTED IN THIS REPORT
Personal Checks/Money Order	<i>(Ensure pledge form includes amount and is signed)</i>		\$

REMINDER CHECKLIST

Review each pledge form for:

- Entered Employee ID Number and Department Code #
- Entered Agency Code and Charity Name
- Accurate Check Amount per designation
- Accurate Total Check Amount
- Check(s) attached directly with the corresponding pledge form
- Signed and Dated

Captain Signature

Date



2022-23 City of Philadelphia's Combined Campaign Paper Pledge Batch Submission Form: **Fundraising Event**

Please complete this form according to the instructions provided below. Thank you!

DATE	BATCH# (This is your department# _today's date, Example: 01_10112019)		
DEPARTMENT NAME		DEPARTMENT NUMBER	
CAPTAIN	EMAIL		PHONE
PLEDGE FORM DELIVERY METHOD	MAILED TO AMERICA'S CHARITIES <input type="checkbox"/>	DATE:	
	DROPPED IN DROPBOX <input type="checkbox"/>	DATE:	

INSTRUCTIONS

PLEASE NOTE: Submit only fundraising event monies with this batch. Tally the # of Individual Contributors and Total Annual Amount. Print and sign this form and submit this form with the fundraising event monies to America's Charities.

All checks should be made payable to Philadelphia Combined Campaign. Cash must be converted To a Money Order or Check. *America's Charities will not accept cash.*

SUBMISSION: Submit batches to one of two locations below.

- MSB-Concourse-Window 18.
- MSB-Combined Campaign Desk, Room 1530

BATCH SUMMARY	<i>Only include fundraising event monies in this report</i>	<i># of Individual Contributors</i>	TOTAL AMOUNT SUBMITTED IN THIS REPORT
Fundraising Event	<i>(List designations below, checks payable to Philadelphia Combined Campaign)</i>		\$

FUNDRAISING EVENT MONEY PLEDGE		<i>Use this area to designate special event funds to specific charities.</i>
AGENCY CODE	CHARITY NAME	AMOUNT
-		\$
-		\$
-		\$
-		\$
-		\$
-		\$
-		\$
TOTAL FUNDRAISING AMOUNT		\$

REMINDER CHECKLIST

Review each pledge form for:

- Entered Agency Code, Charity Name, and Amount per Charity in the box above
- Total Fundraising Amount equal to Check Amount
- Check(s) attached directly to Batch Submission Form

Captain Signature

Date

Thank you for advocating for the Combined Campaign!

www.phila.gov/combinedcampaign

#PhillyGivesTogether

