

2025 City of Philadelphia Combined Campaign Captain's Manual

Captain's Manual



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CAMPAIGN OVERVIEW

October 20 - December 12, 2025

The Philadelphia Employees' Combined Campaign is the City'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. 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.

Our objective this year is to inspire at least 15% of the over 27,000 City employees to participate in the Combined Campaign. Retaining current employee donors as well as recruiting new donors will be essential. We need your help to invite every employee, without coercion, to contribute to the causes they care about. The information in this guide is designed to help you succeed.

CAMPAIGN FAST FACTS

- Website and giving portal: The Combined Campaign website and giving portal is: www.phila.gov/combinedcampaign
- <u>Dates</u>: The 2025 Combined Campaign campaign runs October 20 December 12, 2025
- Participants:
 - <u>Donors</u>: Any active city employee, or contract employee is eligible to participate in the Campaign
 - <u>Charities:</u> More than 300 charities are recipients of funds raised through the Combined Campaign
- <u>2025</u> Goals
 - 15% 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.
- <u>Minimum donation</u>: There is a \$2 minimum donation for payroll donations, credit/debit card or electronic check

CAMPAIGN ADVISORY COMMITTEE & LEADERSHIP

The Campaign Advisory Committee is chaired by Candi Jones, Director of Human Resources for the City of Philadelphia, who has been appointed by the Mayor. The Committee is comprised of one representative from each Participating Fund or Federation, and a representative from the Campaign Management Organization



(CMO). The Advisory Committee may also include other city employees, Campaign Captains, or individuals who may be invited by the Mayor.

The Advisory Committee oversees the planning and execution of the Campaign, including: developing procedures, administrative budgets, and operating guidelines for each annual Campaign, approving Campaign materials, and providing support and materials for Campaign activities and events.

As they have for the past several years, <u>America's Charities</u> – 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.

ADVISORY COMMITTEE

Chair: Candi Jones, Director of Human Resources, City of Philadelphia Fund/Federation Members:

- o America's Charities
- o Bread & Roses Community Fund
- o Catholic Charities Appeal
- o CHC: Creating Healthier Communities
- o DVLF (Delaware Valley Legacy Fund)
- o EarthShare
- o Global Impact
- o Police Athletic League
- o UNCF
- o United Way of Eastern PA & Southern NJ
- o WOMEN'S WAY

City of Philadelphia Office of Human Resources - Campaign Oversight

• Nicole Morris, Deputy Director for Strategic Partnerships: Nicole.morris@phila.gov

America's Charities - Campaign Support and Funds Management

• Becky Marx, Client Engagement Manager, bmarx@charities.org

WEBSITE AND GIVING PLATFORM HIGHLIGHTS

The Combined Campaign website and giving portal (www.phila.gov/combinedcampaign)

- Allows City 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: phillysupport@charities.org, (703) 957-7888, or www.charities.org, support

Combined Campaign Giving Portal Credentials

Each employee may log in to the giving portal using the following:

Username: First Initial + Last Initial + Employee ID

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

JD123456

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.

CAPTAIN RESPONSIBILITIES

Captains are essential to the campaign. You organize and run the Combined Campaign in your department, and gain support from your leadership team. Your responsibilities include:

- Attending 2025 Combined Campaign Captain training
- Distributing campaign materials (virtually or in-person, depending on your department's set-up)
- Working with your department leadership to create a plan to promote the campaign and encourage employee giving
- Educating co-workers about the benefits of the Campaign
- Promoting and publicize the Campaign regularly within your department- a communication toolkit will be provided to you to assist with this
- Hosting department fundraising events and/or host charity speakers
- Establishing department contacts at field locations to assist with encouraging employees to give (if applicable)
- Ensuring all employees are invited to give but no coerced in any way
- Becoming familiar with the Giving Portal and assisting coworkers with giving online
- Ensuring that all participating employees are thanked and recognized
- Maintaining donor confidentiality
- Keeping Department Leadership advised on department's campaign progress
- Collecting and submitting paper pledge forms (where applicable)



SUBMITTING CAMAPIGN DONATIONS & PLEDGE FORMS

Every effort should be made to encourage employees to <u>give online</u> through the <u>giving portal</u>, 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. The giving portal is mobile-friendly and can easily be shared via QR code for donors without access to a computer. Pledge forms should be made available only for those <u>without</u> access to the internet. Donors who do not wish to give via payroll deduction have the option to make a one-time gift through the giving site.

Contract Employees

Employees without a city-issued employee ID may make donations to the campaign via check or credit card. Contract may complete a paper pledge form, or make a donation online using the <u>Contract Employee Giving Site</u>. The <u>Contract Employee Giving Site</u> is the only giving method that allows contract employees to make monthly recurring donations. Donations made by contract employees using paper pledge forms must be one-time contributions. Checks from contract employees should be submitted in the same way employee checks and pledge forms are.

For those unable to make a pledge online, you should instruct employees to return their completed pledge forms to you, the Captain, for processing. When you have received a completed pledge form, you will need to turn it in one of the following ways:

- Drop off at Window 18 (M-F, 8am-12pm) -located on the concourse level of MSB
- Scan and email to: phillypledges@charities.org
- Mail them c/o America's Charities at:14200 Park Meadow Drive, Suite 330S, Chantilly, VA 20151

NO CASH will be accepted. If your department had a fundraiser, cash needs to be converted to a check and mailed to America's Charities, or money can submitted online using the <u>Fundraiser Submission Site for Captains</u>.

All paper pledge forms MUST be postmarked or electronically submitted by FRIDAY, DECEMBER 12.



DEPARMENT FUNDRAISING EVENTS

Captains are encouraged to host your own special events within your department. These events can be open to other City employees or only for your department's employees

Getting started:

Depending on the size of your department, it's ideal to recruit assistance (from the central office and field locations as applicable) to help execute events. These individuals can help promote events, secure events spaces (if needed), collect and submit funds raised etc.

Virtual Fundraising Sites

If you want to host a fundraising event for your department (for example, a virtual trivia game or bake sale), but don't want to track attendees and manage cash payments, you can submit a request for a one-time special event page specifically for your event. An event site allows employees to participate in fundraising events that involve registration or a fee to participate. Payments are made through the site and Captains can track them in real time. Any money raised is automatically credited to your department's total dollars raised.

To request a fundraising site for your event, submit the <u>Event Request 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 it's recommended you submit your request at least two weeks in advance. When the site is ready, America's Charities will send you the site link that you can then share with employees.

Important guidelines to keep in mind:

- No gambling
- No alcohol sales
- No soliciting donations from private businesses (however, America's Charities can make requests on your behalf)

Questions to ask yourself when planning an event:

- o Do we need an event website?
- Do we need to reserve space?
- o Do we need volunteers to run the event or donate items?
- Will this event be internal only or promoted to other departments to participate?
- o 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?
- o If it's an outdoor event, do you have a rain plan?

Submitting money from events

It is preferable 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. Virtual Fundraising Pages: This is the easiest way to collect money for events and requires some pre-planning. These pages are open for the duration of a specific 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 your department's total. You can request multiple individual event pages based on your calendar of events.
 - o It takes approximately one week for these pages to be created so we recommend requesting them two weeks ahead of most events so you can include the site link 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. Fundraiser Submission Site for Captains: You can also deposit cash or funds from sites like Venmo into your own account and then use your personal payment method on the <u>Fundraiser Submission Site for Captains</u>. This page is only for Captains 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. Mail a Check: The last option is to deposit the cash collected at an event and send a check or money order to make your contribution. You MUST complete the Check/Money.order.submission.com PRIOR to mailing any checks.
 - o 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: Philly Combined Campaign,14200 Park Meadow Drive, Suite 330S, Chantilly, VA 20151.

<u>DO NOT mail cash.</u> Any checks mailed without completing the Special Event Check



Submission Form may not be correctly attributed to your department's totals.

Requesting an Individual Event Page

Captains should request an Individual Event Page by submitting a virtual request form via this link:

Department Fundraising Event Site Request

Captains 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.
- Once your page is set up and ready to accept payments, you will receive an e-mail confirmation with a link to your event site that you can share with participants.

Below are links to some sample event pages to give you some ideas of how these pages can be used to support your department fundraisers:

- SAMPLE EVENT: Chili Cookoff
- SAMPLE EVENT: Bingo
- SAMPLE EVENT: Silent Auction Winner Payments

When submitting an Individual Event Page 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 landing page so Captains 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 event page. Once complete, the Captain



who submitted the form will receive an email confirmation that includes a link to the event page and a report link. Captains will need both links, so be sure to keep them handy. Here are some more tips to keep in mind:

- In promotion of the event, Captains should provide participants/donors with the site link for the event and include information related to registration deadlines and participation rules or requirements.
- Donors accessing the site via web or mobile devices may use the site link to register for the event or donate via credit/debit card or bank account.
- After completing their registration or donation, donors will receive a tax receipt immediately at the email address they provided when registering/donating.
- How to use the report link: at any point after the event page has been created, Captains can track registrations and payments using the report link. This link is shareable and directs the user to a CSV sheet that includes all donor names/emails and payments received via the event link. Data is refreshed every minute with the most up to date information, meaning the event sites can be used to track donations and payments in real time, and can easily be imported into a spreadsheet or other systems. Note that anyone with the link will have access to all of the data captured by the site, so report links should NOT be shared beyond Captains. The report link is included in the same email confirmation that included the event page link.
- Donations from the event will be recorded as a single donation (total funds raised through the event) and listed as a "Department Event," on your department's final report.

ADDITIONAL TIPS FOR SUCCESS

1. ASK EVERYONE

- Giving every person the chance to contribute and share in the City of Philadelphia 2025 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.



HELPFUL LINKS & HELP FOR CAPTAINS

PRINT MATERIALS REQUEST

CHARITY SPEAKER REQUEST

VIRTUAL FUNDRAISING EVENT SITE REQUEST

CONTRACT EMPLOYEE DONATION SITE

FUNDRAISER SUBMISSION FORM-ELECTRONIC PAYMENTS

FUNDRAISER SUBMISSION FORM-CHECKS

Donor/Charity Support

America's Charities Help Desk: phillysupport@charities.org, (703) 957-7888, or www.charities.org/support

To find answers to your Frequently Asked Questions (FAQs), visit www.phila.gov/combinedcampaign



MAKE YOUR PLEDGE IN FIVE EASY STEPS!

How to Give Online:



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 + Payroll ID (Example: A person named John Doe with the Employee ID of 123456 would use the username J D123456 or jd123456)

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

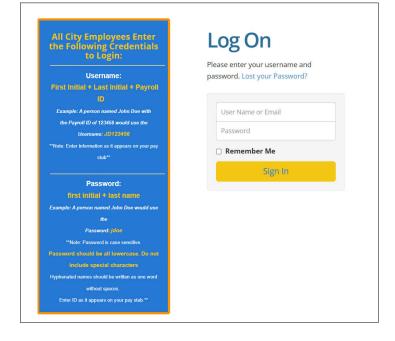
Password = First Initial + Last Name

(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 (<u>Example</u>: 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." The information you enter will be provided to the nonprofits you support through this Campaign so they can acknowledge your gift. You will have the option to elect to share (or not share) this with your designated charities before finalizing your pledge.
- (5) Select "Continue" when you have finished updating your contact information.



Select a Payment Method

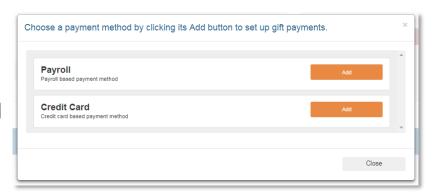
You may support your favorite nonprofits via Payroll Deduction or a one-time donation by credit card.

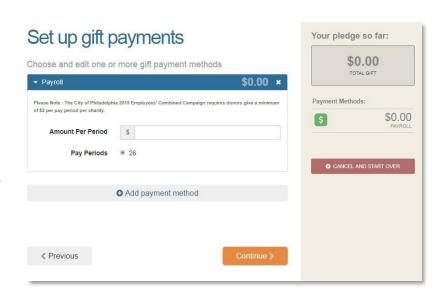
(1) Click "Add" to choose your payment method.

Payroll Deduction:

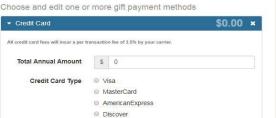
Enter in the amount you would like to pledge <u>per pay period</u>. As you enter in the per pay period amount, you will see the annual amount you are pledging on the right under "Your pledge so far."

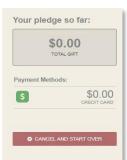
NOTE: The City of
Philadelphia Combined
Campaign requires donors to
give a minimum of \$2 per
pay period per charity (\$52
per charity annually).





Set up gift payments



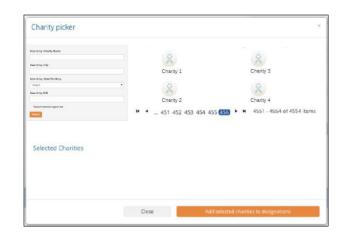




Credit Card:

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.

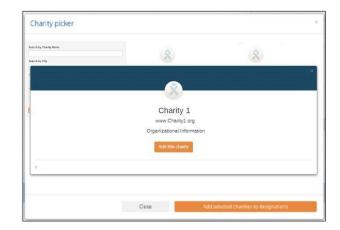
(2) Once you have selected the amount you would like to pledge per pay period or by one-time credit card payment, and you agree with the annual total you are pledging to the right under "Your pledge so far," click "Continue" to find charities to support.





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."

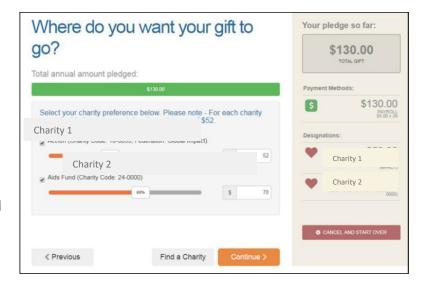




- (4) Click the orange "Add selected charities to designations" button. The organization(s) you selected will now display on your list of designations.
- (5) Next, you will have the opportunity to allocate your total pledge amount between the organizations you have added to your list of designations. 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.

Change Donation Amount of Charity Designations:

- (1) The amount you selected during the payment method step will be allocated between the charities you have selected. Please Note: The City of Philadelphia Combined Campaign requires donors to give a minimum of \$2 per pay period per charity (\$52 per charity annually).
- (2) 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."

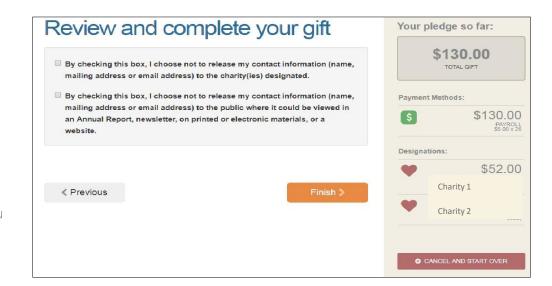






Submit Your Pledge

- (1) 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.
- (2) Click "Finish" to submit your pledge.





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.



CAPTAINS REPORTS

America's Charities Reporting Portal Guide Instructions

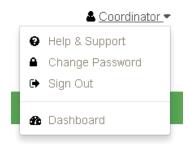
America's Charities provides a robust reporting portal to help Captains be successful in charitable giving campaigns. The reports provide coordinators with the data they need to manage incoming pledges and track against goals.

User Access

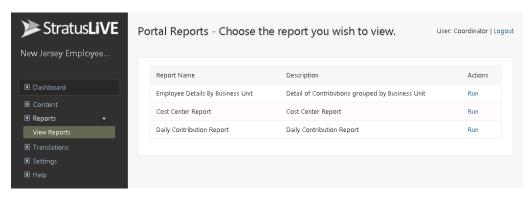
America's Charities will work with you to determine who should have access and at what level. Captains can be limited to a single Business Unit, multiple Business Units, or can view the entire organization. A Business Unit can be an agency, department, team, etc. Business Unit access is hierarchal. For 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 is the top-right corner and choose Dashboard from the menu.



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



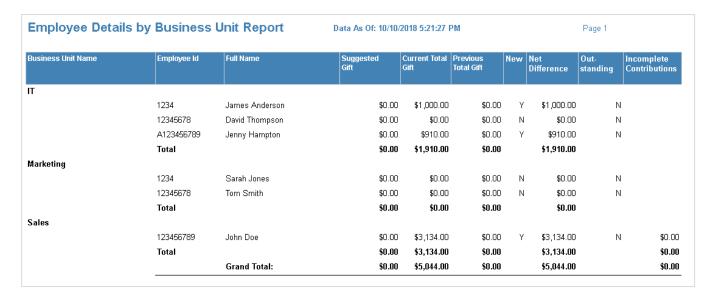


Employee Details by Business Unit Report

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.



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



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 S	Summary Report		Data As Of: 10/10/2018 5:18:34 PM					
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

TAX INFORMATION

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

- Keep a Copy of Your Donation: If the contribution is made through the online giving portal, ask donors to keep a copy of the confirmation email. If the contribution was made using a paper pledge form, ensure that the donor keeps a copy of their pledge form for their records.
- Tax Filing: Donors may use a copy of their donation (either the email confirmation if an online pledge, or a copy of their pledge form if paper) and their final paystub of the calendar year for tax filing purposes. The final paystub will confirm the total amount withheld from the employee's pay, and together these two documents provide the necessary documentation of the charitable contribution made.
- When in Doubt: direct donors to consult their tax advisor. Neither the City of Philadelphia nor America's Charities provides tax advice.

