

**2012**

**Combined Charitable Campaign**

**Resource Manual for**

**Bureau Representatives**

**From the Office of Management & Finance**

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*Karyl Whelan, Charitable Campaign Coordinator 3-5879*

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# CAMPAIGN EVENTS CALENDAR

October 19, 2011 – November 1, 2011

| EVENT   | WHEN                           | PARTICULARS   | WHERE                                  |
|---|--------------------------------|---|--|
| City Hall Kick Off                                | October 19th<br>8:30AM–10:00AM | Mayor Adams to speak; sign-up for drawing; visit with Charity reps. | City Hall Atrium                       |
| Eastside Kick Off                                 | TBA                            | Visit with charity reps   | Bureau of Maintenance<br>2929 N. Kerby |
| Pledge packets delivered to Bureaus               | Week of<br>October 19th        |   |  |
| Campaign Dates                                    | October 19-<br>November 1      |   |  |
| Pledge forms and tally sheets due to Karyl Whelan | November 15, 2011              |   | 106/1250                               |
| Drawing for gift certificates                     | Mid-December                   |   | Winners to be notified by email        |
| Payroll deductions begin                          | January 12, 2012               |   |  |

# PRIZE DRAWING

Portland businesses have generously donated gift certificates to the Charitable Campaign to help promote employee participation. Employees will have their names entered into the drawing for these prizes in one of two ways:

By donating to the Charitable Campaign

By attending one Campaign Kick Off

October 19th in the **City Hall Atrium** from 8:30 – 10:00  
Pastries and Beverages

TBA at the **Bureau of Maintenance**

## Charitable Campaign Bureau Representatives

| Bureau                              | Name  | Phone  |
|-------------------------------------|---|--|
| City Attorney                       | Stephanie Harris  | 3-4047   |
| Auditor's Office                    | Sarah Landis  | 3-4567   |
| BES                                 | Kristan Burkert<br>Daniela Cargil<br>Sarah Covington<br>Lori Foster<br>Cynthia Triplett | 3-5522<br>3-7226<br>3-2410<br>3-7781<br>3-2340 |
| BOEC                                | Glennidia Lemoine   | 3-4661   |
| BTS/All other                       | Alex Miller   | 3-5551   |
| Office of Cable Communications      | Carol Justice   | 3-2005   |
| Comm. Fish                          | David Nguyen  | 3-3597   |
| Comm. Fritz                         | Milena Hermansky  | 3-4124   |
| Comm. Leonard                       | Kenneth Edwards   | 3-4321   |
| Comm. Saltzman                      | Mary Gay Broderick  | 3-2947   |
| BDS                                 | Melissa Kuhn  | 3-7796   |
| EBS                                 | Suzanne Browne  | 865-8401                                       |
| FPD&R                               | Julie Morrow  | 3-6823   |
| Fire & Rescue                       | Barbara Kunkel  | 3-3792   |
| OMF/City Fleet                      | Marv Navarro  | 3-4341   |
| Government Relations                | Amy Julkowski   | 3-1036   |
| Human Relations                     | Muna Mohamud  | 3-4427   |
| OMF/Human Resources                 | TBA   | 3-   |
| Mayor's Office                      | Grace Uwagbae   | 3-4740   |
| OMF/Business Operations             | Sharon Wolf   | 3-4283   |
| OMF/Accounting & Financial Planning | Sharon Wolf   | 3-4283   |
| OMF/Facilities                      | Rhonda Anderson   | 3-5253   |
| OMF/Procurement Services            | Gary Perry  | 3-2297   |
| ONI                                 | Teresa Solano   | 865.2626                                       |
| PDC                                 | Jessi Rhodes  | 3-2342   |
| OMF/Printing & Distribution         | Donald Bryans   | 3-4460   |
| PBOT                                | Maureen Yandle  | 3-6047   |
| PBOT/Maintenance                    | Kylia Hammon  | 3-1785   |
| PBOT/PED                            | Donald Hunter   | 3-5051   |
| PBOT/Traffic Operations             | Sally Seegar  | 3-7687   |
| PHB                                 | Donna Lewis   | 3-2376   |
| POEM                                | Daire Elliott   | 3-4375   |
| Parks                               | Cierra Booker<br>Sara Drake   | 3-6885<br>3-2210                               |
| Planning & Sustainability           | Desiree Vaughn-Rose   | 3-5095   |
| Police                              | Patricia Pleune<br>Patty Hanna  | 3-0283<br>3-1159                               |
| OMF/Revenue Bureau                  | Dolores Whitney   | 865-2451                                       |
| OMF/Risk Management                 | Leanna Smith  | 3-5209   |
| OMF/Public Finance & Treasury       | Julia Sparks  | 3-4220   |
| Water Bureau                        | Barbara Rice  | 3-7960   |

Call with questions or refer to the City WEB site <http://www.portlandonline.com/index.cfm?c= 29836>

Thank you for your participation as a Bureau Representative for the City's 2012 Combined Charitable Campaign. The success of the campaign is in large part dependent on your efforts and enthusiasm. Your contribution to the City's campaign helps to make a difference locally, statewide, nationwide and worldwide.

Last year, City of Portland employees contributed \$267,837.32 to almost 500 human service, environmental, health, international relief, arts and culture and education programs represented by the 15 participating funds and federations.

The following funds/federations will participate in the City's 2012 Combined Charitable Campaign:

America's Charities  
Black United Fund of Oregon, Inc.  
Children's Trust Fund of Oregon  
Community Health Charities  
Earth Share of Oregon  
Equity Foundation  
Global Impact  
Local Independent Charities  
McKenzie River Gathering Foundation  
Portland Parks Foundation  
Portland Police Bureau Sunshine Division  
Portland Schools Foundation  
Portland Fire Bureau Toy and Joymakers  
United Way of the Columbia-Willamette  
Work for Art

# YOUR ROLE AS A BUREAU REPRESENTATIVE

As a campaign representative, your leadership and enthusiasm are vital to the successful outcome of the campaign. Whether you volunteered or were volunteered, thank you for your time, energy and commitment to the campaign.

## **Elements of a Successful Campaign**

***Leadership and Support:*** People should feel as if the campaign is important to and supported by their leaders.

***Teamwork:*** A successful campaign is one in which a sense of ownership is created.

***Personal Contact:*** One-on-one contact adds a personal connection and helps to ensure a successful outcome.

***Visibility:*** A good campaign is well publicized using tools such as staff meetings, newsletters, table displays, posters in areas where employees gather. Keep the campaign alive and visible for the entire two-week duration.

***Voluntary Giving:*** Coercion should never be employed.

***Make it Fun:*** Events should be fun, creative and colorful.

***Appreciation/Recognition:*** Take time to let people know their effort and support are important and appreciated.

## **Effective Management of Your Bureau's Campaign**

### **Understand Your Role**

Be positive, confident and enthusiastic.

Make your contribution first.

Develop a campaign strategy that will be effective in your bureau's culture.

Be informed about the campaign, the participating funds/federations and the many agencies they serve.

Communicate.

Be accessible to your co-workers.

If you don't know an answer to a question, please ask the appropriate fund/federation representative or the Citywide campaign manager – **Karyl Whelan, 823-5879** or via email.

Honor the campaign's established timelines and process.

## **Ask for Participation**

### **There is no substitute for face to face contact.**

Be courteous and confident.

Actively listen.

Communicate the needs of our community and beyond; perhaps share a personal story about a family member or friend who was served by a charitable organization.

Share the variety of choice that is available through the City's Combined Charitable Campaign.

Share what you have learned about the participating charities and the wide range of choice that is afforded City employees through the 15 participating umbrella fund/federations.

Say thank you on behalf of the thousands of people who receive support through the participating agencies.

If an employee chooses not to participate in the workplace giving campaign, remember it is a personal choice and they may well participate in their community in other ways, so thank them for their time.

## **Handle Objections**

Questions and objections are a very natural part of the solicitation process.

Actively listen.

Don't argue or engage in a debate.

Respond to questions and encourage a review of the campaign materials. If requested, offer to get additional information or point them to the appropriate source.

Don't personalize objections.

If there is objection to a participating agency or the lack of an agency, share the many options from which there are to choose.

They can elect to designate a particular agency within the fund/federation for allocating their donation.

They can elect to designate an agency within a particular fund/federation that they wish to exclude in the allocation of their dollars.



Help is available from the Campaign coordinator  
Karyl Whelan, 823-5879  
or any of the charity representatives.

## CAMPAIGN NUTS AND BOLTS

### PLEDGE FORM INSTRUCTIONS

Pledging (payroll deduction and checks/cash) is accomplished by using the consolidated pledge form.

An employee may give to one or multiple agencies using the same form.

Completion of the pledge form (see enclosed sample):

Employee's name: This field is required even if the contribution is being made via check to ensure

we can contact the employee if there are any questions.

Employee Identification number: Provide the number whenever the donation is being made through payroll deduction. It is not required if the donation is in the form of a check/cash.

Bureau: This field is key to providing an accurate tally of bureau's total.

Payroll Deduction:

Deductions are made on a calendar year basis.

***There are 26 payroll periods in Calendar 2012; **pledge forms which are returned after the November 15, 2011 deadline may impact an employee's ability to deduct over the full 26-payroll periods. Therefore, it is critical that Bureau Reps. return all bureau pledge forms to Karyl Whelan (106/1250) no later than November 15, 2011.*****

Deductions will begin with the paycheck received on January 12, 2012 (again, assuming the November 15th deadline has been met).

An employee may choose to deduct over the 26 payroll periods or they may choose to have their payroll deduction over a shorter period of time. ***It is important to note that the deduction amount must remain consistent within each umbrella organization. Example: \$3.00/26 pay periods to one umbrella and \$5.00 /13 pay periods to another umbrella.***

Employees electing to make a cash/check gift to multiple organizations will need to include a separate check payable to each of the agencies they have selected for donation. ***Cash donations are discouraged for handling and security reasons.***

- ✓ Employees may designate a specific agency(ies) to receive their contribution within an umbrella organization. The designated agency must be listed under one of the participating funds/federations.
- ✓ Employees may exclude an agency from receiving any portion of their contribution within an umbrella organization.
- ✓ Employees may designate a specific agency(ies) to receive their contribution within an umbrella organization. The designated agency must be listed under one of the participating funds/federations.
- ✓ Employees may exclude an agency from receiving any portion of their contribution within an umbrella organization.
- ✓ Employees must sign the pledge form if a payroll deduction is being made.
- ✓ In the lower right hand corner there is a block which needs to be completed if the employee wishes to receive acknowledgement from the charity(ies) of their gift. The wording in this block encourages employees to provide their name and address. While all contributions are confidential, the acknowledgement letter and the end-of-year pay stub are valuable for IRS purposes.
- ✓ Employees should make a photocopy of the completed form if they want a copy for their own records. The completed originals are returned, together with the tally form and accompanying checks to Karyl Whelan, 106/1250.

## Questions?

Contact Karyl (3-5879)

or

visit the City WEB site <http://www.portlandonline.com/index.cfm?c=29836>

## **TALLY SHEET INSTRUCTIONS**

Accurate completion of the Tally Sheet (see next page) facilitates a difficult and significant reconciliation process. It is available in both hard and electronic (Excel) format.

Bureau reps. need to return Tally Sheets to Karyl Whelan by the end of the day November 15, 2011. Tally Sheets and/or pledges turned in later might not be processed in sufficient time for the first payroll deduction with the January 12, 2012 paycheck.

Before filling out the Tally Sheet, check each pledge form for the following:

- ✓ Employee name is legible and PERNR is complete.
- ✓ When giving to an affiliate, be sure it is listed under correct umbrella.
- ✓ Employee has included name and address for letter of acknowledgement from charities to which they have contributed.
- ✓ Employee must sign pledge form when giving through payroll deduction.
- ✓ Highlight federation(s) receiving donation.
- ✓ Add contributions to verify total on pledge form is correct.
- ✓ If cash is the only option for the employee, try to find someone to write a check for them.

To complete Tally Sheet:

- ✓ Review all pledge forms with employees when submitting form so any discrepancies can be immediately corrected.
- ✓ Enter Bureau/Division Name.
- ✓ Enter the name of bureau campaign coordinator(s) and telephone numbers.
- ✓ Enter the number of check/cash donations by agency. Remember, one employee may count as a multiple donor due to contributions to more than one agency: an employee donating to all 15 agencies would count as 15 donors.
- ✓ Enter the number of payroll deduction donations by agency.
- ✓ Enter the dollar amount of cash/check contributions.
- ✓ Enter the dollar amount of payroll deductions.
- ✓ Total all four columns.
- ✓ Enter the Grand Total of Donations and Total Amount Donated.
- ✓ Attach all original pledge forms.