

## Charitable Campaign

### 9/30/14 Meeting Notes

- Charity Umbrella/Affiliate upload
  - City gets list of names of affiliate charities with umbrella applications
    - Karyl to add requirements for further affiliate information to the application process next year
  - Meghan will send list of charities, City will compare for new affiliates, Rick will validate codes, we will send back to Meghan
    - Elyse to send Meghan the list the City has already developed
- Employee upload
  - Rick to create based on last year's format
  - Send to EarthShare week of October 13
- PDC
  - Goal is to include them in the electronic campaign
  - Had already set up PDC deduction selection – 12 times per year (PDC Only)
  - Need to get employee information separately from Jesse at PDC
    - Karyl and Meghan to contact
  - PDC can come in to City's website or access giving site from the web
  - Easier to include PDC in the overall campaign download and then extract PDC from file for Payroll
- Payroll deduction options
  - If employee wants to retire or leave, can elect to manually have the balance deducted
  - Only offer 1 or 26 times for City and 1 or 12 times for PDC
  - Paper pledge forms
    - Want to enter information in the system
    - Want to use paper pledge forms for checks?
- Methods of giving:
  - Payroll deduction, checks, 1x credit card
- Payroll Upload:
  - EarthShare will add wage types to download
  - Payroll will use EarthShare download to roll up wage types and enter a formula for per pay period amount for their upload
    - Elyse will be an example and will work with Dick at the time of upload
- Timeline
  - November 28 – pledge sheets to Karyl
  - Enter pledge sheets by December 12
  - Payroll needs the EarthShare spreadsheet by December 19

#### For Give@theOffice Campaign setup

- Karyl has sent list of bureau representatives. Meghan will "tag" people when the employee upload is complete.
- Meghan will provide instructions for the bureau reps to access donation reports from the system – we will post on the bureau rep resource page of the web

- Add information to web about who to contact if don't get letter of acknowledgement or if gave a donation "in honor of" and person was not notified
  - Contact the umbrella group
  - Meghan will remind umbrellas when they receive their reports to look for "in honor of"
  - Add to application in future years
- We do not want to "turn on" the demographic questionnaire
- We do offer the option to write in a charity not on the list
  - Work for Art passes through to arts groups
  - United Way passes through to all the others
- We are not turning on the "gift" option for participating in the campaign