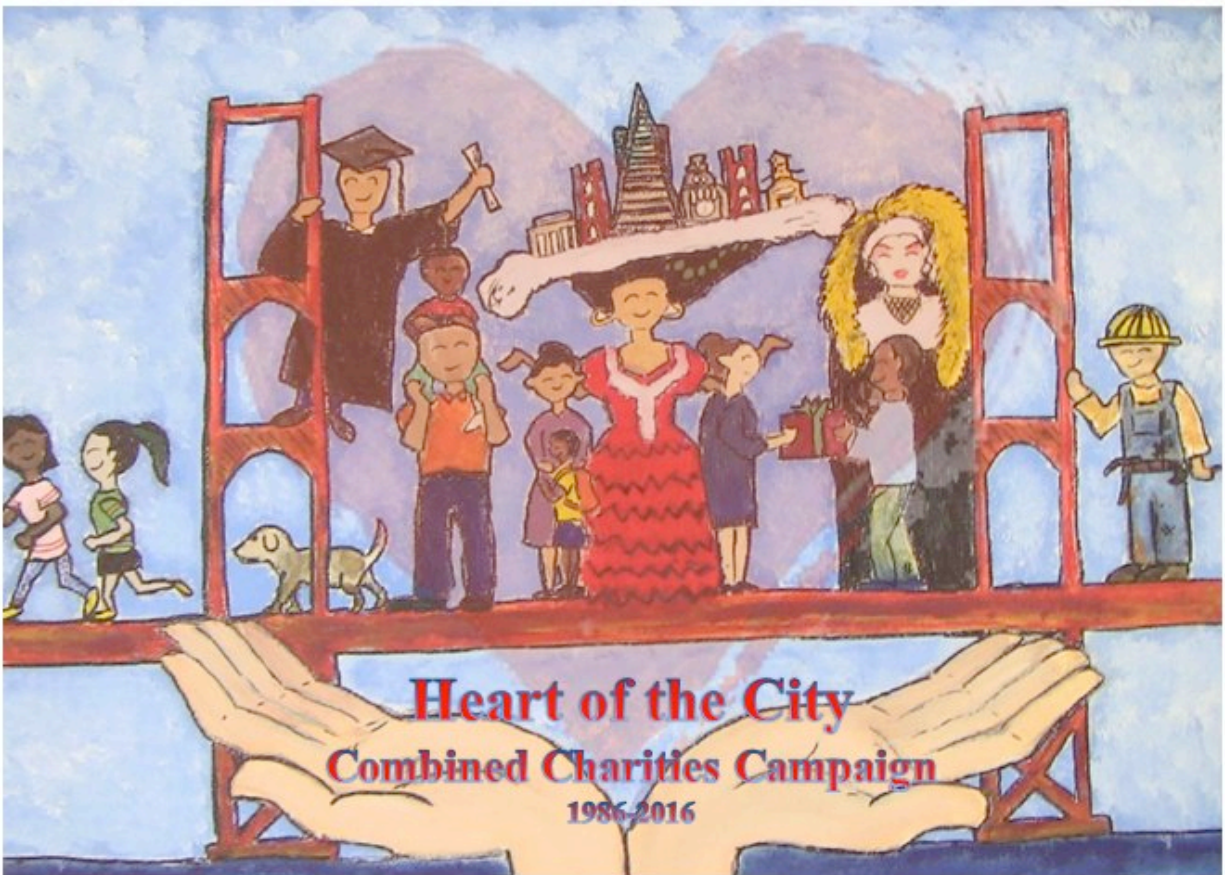


**CITY and COUNTY  
OF SAN FRANCISCO**

*2016 Combined Charities Campaign  
October 3 – October 31, 2016*

**Celebrating 30 Years of Combined Charities!**



**Campaign Training Manual**

<http://www.sfgov.org/charity>

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***“Heart of the City”***

The Combined Charities campaign makes a real impact!

The **“Heart of the City”** Campaign provides a convenient opportunity for CCSF employees to learn about and support participating organizations. By giving “at the office,” we save charities the time, effort and expense of seeking out and/or processing individual donations. By contributing via payroll deduction, we enable them to budget and plan programs based on a more reliable estimation of their incoming financial resources and with confidence of that revenue stream being consistent throughout the year.

In 2015, the campaign raised over \$1,358,000. Of this total, “Leadership Givers” – those who gave \$500 or more – donated over \$840,000 - 63% of total contributions. Thank you for your generosity!

**The goal of the 2016 “Heart of the City” Campaign is to raise \$1.5 Million!  
We’ve done it before, we can do it again!**

**As Department Coordinators and Captains, YOU make the difference!**

Without you there could be no campaign. Your enthusiastic involvement encourages everyone in your department, from managers on down, to participate. Thank you for caring and for taking action in order to help others!

|                                       |   |
|---------------------------------------|---|
| <b><u>September</u></b>               |   |
| Wednesday, September 28 <sup>th</sup> | KICK-OFF EVENT! Captain and Coordinator Training  |
|                                       | Location: City Hall - South Light Court   |
| <b><u>October</u></b>                 |   |
| Monday, October 3 <sup>rd</sup>       | Campaign Officially Begins  |
| Tuesday, October 11 <sup>th</sup>     | <b>Forms must be turned in NOON for eligibility in Coffee Card Drawing.</b>   |
| Thursday, October 13 <sup>th</sup>    | Coffee Card Drawing Winners Announced   |
| Tuesday, October 18 <sup>th</sup>     | <b>Forms must be turned in by NOON for eligibility in Early Bird Drawing</b>  |
| Thursday, October 20 <sup>th</sup>    | Early Bird Drawing  |
| Tuesday, October 25 <sup>th</sup>     | <b>Forms must be turned in by NOON for eligibility in Mid-Campaign drawing</b>  |
| Thursday, October 24 <sup>th</sup>    | Mid-Campaign Drawing  |
| Monday, October 31 <sup>st</sup>      | Campaign Officially Ends  |
| <b><u>November</u></b>                |   |
| Tuesday, November 8 <sup>th</sup>     | <b>Last Day to Turn In Pledge Forms<br/>FORMS MUST BE TURNED IN BY NOON TO BE INCLUDED IN FINAL DEPARTMENT TOTALS FOR AWARDS AND REPORTING PURPOSES</b> |
| Thursday, November 10 <sup>h</sup>    | Final Drawing at San Francisco City Hall  |
| <b><u>December</u></b>                |   |
| Wednesday, December 7                 | Captain, Coordinator & Leadership Thank You and Recognition Reception at Hotel Whitcomb   |

## CAPTAIN / COORDINATOR RESPONSIBILITIES

*Your goal is to inspire each of your co-workers to support local charities.*

- Before the campaign starts, set the stage. Put up posters. Make campaign announcements. Identify causes that will appeal to people within your unit. Ask “opinion leaders” to help. Involve employee groups and union representatives. Think about events that might be fun, and speakers that might be compelling.
- When the campaign begins, ensure each employee receives a pledge form and a brochure. This is your most basic responsibility!
- During the campaign, note which employees you have spoken with so you remember to encourage all of them to participate.
- Be respectful of each employee’s personal decision to participate or not.
- Help employees fill out the pledge forms, answer their questions, and give out drawing tickets. **Make sure employees have SIGNED their pledge form, if required (required for ALL payroll deduction). Please verify employees have completed the Employee ID portion of the form utilizing their SIX DIGIT DSW code prior to submitting forms**
- Personally thank each donor for their gift. People take great pride in donating and appreciate it when their generosity is acknowledged.
- Collect the pledge forms, completed checks and drawing tickets. Make sure they are all filled out correctly and employees retain the Donor (pink) copy of the pledge form as their receipt. Staple one-time checks and/or additional pledge forms together. **NO CASH DONATIONS WILL BE ACCEPTED.** All cash received will be returned to the coordinator with the pledge form. Personal checks and money orders are okay.
- Combine the submittal sheet with its pledge form(s) and drawing tickets into a set. Captains fill out the top two thirds of the submittal sheet, the lower third will be filled out by the Coordinator. Send each set to your Department Coordinator. More detailed instructions can be in the Forms section of this manual. Submittal sheets can be found online at [www.sfgov.org/charity](http://www.sfgov.org/charity)
- Work with the Department Coordinator to reward special City and County of SF gifts to Leadership Givers.
- Visit the campaign website at <http://www.sfgov.org/charity>. It has useful information for donors, coordinators and captains, such as:
  - Sample pledge forms
  - Submittal sheets
  - Additional supplies request forms
  - Speaker request forms
  - Drawing instructions
  - Drawing ticket request forms
  - Federation listings & websites
  - Campaign reports

## **PERSONAL SOLICITATION TIPS**

*Here are some tips that will help you lead a successful campaign in your department.*

- **Make your donation first:** The best way to lead is by example! You will also find that you feel more comfortable when asking fellow employees to participate. Your pledge also helps you to familiarize yourself with the pledge form, campaign brochure and how the entire process works.
- **Learn about the charities & Federations in the campaign:** Review the Campaign Training Manual and campaign materials. The more you know, the easier it will be to answer questions and successfully encourage fellow employees to donate.
- **Create a fun campaign atmosphere:** The more visible the campaign is in your office, the easier it will be for you to ask for donations. Some co-workers will even approach you to find out more about it!
- **Proactively approach your colleagues:** Ask if they have questions about the Federations or charities represented in the campaign or if they have a personal charity of interest, help them locate that organization in the brochure. Remind employees that they can donate to any charity via “Donor Choice” as long as it is tax exempt 501(c)(3).
- **Highlight the benefits of giving:** Most people do have a strong desire to help others. Make sure they understand how the employee fund drive is an easy and cost-effective way of doing that. Workplace giving results in more money being raised collectively, and less being spent on individual fundraising and processing efforts; the ongoing nature of payroll deduction helps charities the most in sustaining their efforts year-round; spreading out our gifts may even make it easier to contribute more than we’d otherwise be able to in one lump sum.
- **Thank each individual for his/her time and consideration:** Courtesy is never a bad idea, especially when asking someone for money!
- **Find creative ways to award/recognize people who give:** While a simple “thank you” is always appropriate, special forms of acknowledgement are appreciated and may result in additional participation!
- **Make it easy on yourself! Use the available resources:** Bring charity speakers into your department, hang posters in the break room. Don’t hesitate to call the Federations for these resources or for other ideas! Done correctly, this experience will be easy, fun and rewarding for you!

## **WHAT YOU NEED TO KNOW ABOUT:**

### **CAMPAIGN MATERIALS**

**Q: *What campaign materials should I have?***

**A:** Every employee should receive a “brochure” and a three-part “pledge form”. These are the primary tools. The Coordinators may distribute these materials directly to the employees in their departments, or to their Department Captains to assist them with distribution

**Q: *What if I need more supplies for my department?***

**A:** If you need additional brochures, pledge forms, or drawing tickets, please use the “Campaign Materials Request Form” in the back of this manual or by downloading it from [www.sfgov.org/charity](http://www.sfgov.org/charity)

### **PAYROLL DEDUCTIONS**

**Q: *How does payroll deduction work?***

**A:** Donors determine and tell the payroll department on the pledge form how much money will be deducted from every paycheck throughout the year. For example, if an employee selects “\$20 per pay period” on the pledge form, then \$20 will be deducted from each of the 26 paychecks, for a total of \$520 by year end. The pledge will be deducted from paychecks beginning in January of 2016 and ending the last pay period in December 2016.

**Charities will begin receiving donations in quarterly distributions beginning in May 2016.** Please advise donors not to contact the agency of their choice prior to May as the charity will have no record of any donation before then.

**Q: *What is the advantage of donating via payroll deduction?***

**A:** It is easier to have a smaller amount taken out of every paycheck than to write one large check for the same amount. In the example above, \$520 may be too large an amount to write in one check, where \$20 per pay period is much more manageable. Your pay stub keeps track of your charitable contribution, provides proof of your donation and is a reminder to claim a deduction when filing taxes.

Most important, payroll deduction ensures a consistent and reliable stream of income to the charities throughout the year that one-time gifts do not. This makes it easier for them to budget and plan their annual programs and services. This consistent income stream is a main reason why non-profit organizations participate in campaigns such as this one.

**CASH CONTRIBUTIONS ARE NOT ACCEPTED!  
ALL CASH DONATIONS WILL BE RETURNED, WITH THE PLEDGE FORM, TO  
THE DEPARTMENT COORDINATOR.**

## **FEDERATIONS**

**Q: *What is a Federation?***

**A:** A Federation is an umbrella group that raises money for a number of different charities, often in a similar field. Working with a Federation for the purposes of payroll deduction fundraising is the most cost-effective method the charities have of raising money with minimal administrative expenses.

**Q: *Which Federations are participating in this year's CCSF Combined Charities Campaign?***

**A:** The following Federations have been approved by the San Francisco Board of Supervisors for the 2016 campaign: Local Independent Charities, Asian Pacific Fund, Bay Area Black United Fund, Community Health Charities of California, Earth Share California, Global Impact, and United Way Bay Area. For information on the individual charities that they represent, please see your campaign brochures.

**Q: *Why do Federations retain "administrative fees"?***

**A:** Member organizations within a Federation have agreed to the fees retained by their Federation. These fees allow the Federation to continue doing the work to serve their primary purpose of raising money for their members and the programs and services they provide in the community. The organizations that join the Federations want to be in these campaigns because it is the least expensive way for them to raise money. It is less expensive than direct mail, annual campaigns, telemarketing, and fundraising events. Additionally, because the money comes to them on a regular basis, they are better able to plan programs and services around workplace campaign distributions.

**Q: *Why do Federations and charities prefer payroll deduction over a one-time check?***

**A:** When people give via payroll deduction, they can afford to give more. When they give more, the amount the organization receives after fees are deducted is still more than checks that many donors could write. In addition to the increased capability of the donor:

- The organization's fundraising expenses decrease because they do not have to pay for postage and letters to remind you to give.
- The employer does the promotion, the collection, and the forwarding of the money therefore allowing more resources to go to charities.
- All the gifts are gathered, handled and deposited by the organization at one time instead of check by check, day by day.
- The organization receives a steady stream of money throughout the year, rather than a one-time influx of money once a year

Payroll deductions allow organizations to budget more efficiently and better utilize their resources because they can depend on a regular check from their Federation during the year. Furthermore, Federations select organizations known for the quality programs and their financial accountability.

## **DONOR CHOICE**

**Q: *Can I donate to an agency that is not listed in the brochure?***

**A:** Donor Choice is the vehicle that allows employees to give to any IRS tax-exempt charity that is not listed in the campaign brochure. In the “Donor Choice” section at the bottom of the pledge form *the donor must provide the full name and address of the charity. It is the donor’s responsibility to confirm that the charity is an IRS certified tax-exempt organization.* If it is not, their pledge form may be returned to them, via their Campaign Coordinator or Captain, or they may get a call from the Federation who is processing the donation. You may use more than one pledge form for multiple checks, if needed. Checks will be mailed directly to the Federation or charity designated. Donor Choice donations may be subject to an 11% processing fee.

\*One-time checks for Donor Choice donations should be made payable directly to the designated charity and address must be provided. Additional guidelines regarding Donor Choice are on the back of the pledge form.

## **ONE-TIME DONATIONS AND WRITING CHECKS**

**Q: *Can I make a one-time contribution?***

**A:** Yes. One-time donations must be made by check (cash will not be accepted). One Time Payroll deductions may be made in some instances, but please call the campaign hotline first.

**Q: *To whom do I make checks payable?***

**A:** If you select a charity that is listed with a Federation in the brochure, write that charity name beneath the appropriate Federation heading on your pledge form, and make the check payable to the Federation. They will process that check and distribute it according to their internal procedures, which includes the administrative fees agreed to by their member charities. If you designate a charity that is not listed with a Federation, see “Donor Choice” instructions above.

## **LEADERSHIP GIVING**

**Q: *What is a Leadership Giver?***

**A:** Leadership Givers are employees who donate an annual total of \$500 or more to any Federation, charity or combination of charities. This may be a total of checks written or \$20 or more per pay period. Leadership Givers receive a lovely Combined Charities Lapel Pin and are invited to a special event after the close of the campaign.

**CASH CONTRIBUTIONS ARE NOT ACCEPTED!  
ALL CASH DONATIONS WILL BE RETURNED, WITH THE PLEDGE FORM, TO  
THE DEPARTMENT COORDINATOR.**



## **THE PRIZE DRAWINGS**

**Q: *How do I qualify to be in the drawings?***

**A:** Give a minimum one-time donation of \$25, or the minimum payroll deduction of \$1 per pay period which totals out to be \$26 for one year. If donating through payroll deduction, you will receive one drawing ticket for every \$26 of your donation; i.e.  $\$520 = 20$  drawing tickets. ( $\$520$  divided by  $\$26 = 20$ ). If you choose not to donate, complete the “Request for a Drawing Ticket” form in the back of this manual and turn it in to your Campaign Coordinator or Captain. In return of this form, you will receive one drawing ticket.

**Q: *What do I do with the drawing tickets after I receive them?***

**A:** On the back of each ticket, you will write legibly your name, work phone number and department name. You are going to turn in the entire ticket. Tickets without this information written on them when they are submitted will not be eligible for drawing. After you have completed this information, return the tickets to your Campaign Captain or Coordinator so they can turn them in with your pledge form. Please do not turn in long strands of tickets – tickets should be separated prior to turning them in.

**Q: *When are the drawings?***

**A:** Drawing will be held throughout the campaign. Please refer to page 3 of this manual for dates and other information regarding deadlines.

**Q: *How do I win and how do I know I won?***

**A:** Each completed ticket is eligible to win. The more eligible tickets you submit on time, the more chances you have to win a prize. However, each employee may only receive one prize per drawing. If Jane’s name is drawn more than once in the same drawing, Jane will receive the prize announced for her first win. If Jane’s name is drawn again in that same drawing, it will be set aside and another ticket drawn. If, however, Jane’s name is drawn in two separate drawings, then two (2) prizes will be awarded to Jane. Prize winners will be called at the phone number they provide on the ticket to receive delivery instructions. All prizes and prize winners are also posted on the campaign website.

Any person who wins a drawing prize valued in excess of \$420 should immediately consult Airport or the Ethics Commission for further instructions.

**Q: *Where do the prizes come from?***

**A:** All prizes are generously donated by the federations, businesses and individuals in the community, as well as by San Francisco City & Count departments. Each year the prizes differ.

## **FINISHING THE PROCESS**

**Q: *Who is responsible for collecting the pledge forms in each department?***

**A:** Campaign Coordinators and/or Captains distribute a campaign brochure and pledge form to each employee in their department in the beginning of the campaign. They will also collect completed pledge forms from the employees throughout the campaign, and submit them as are collected. The campaign officially ends Monday, October 31st, however pledge forms may still be turned in beyond this date.

**Q: *What do Campaign Captains/Coordinators do with completed pledge forms and when are they due?***

**A:** Pledge forms and drawing tickets should be reviewed for complete information, including Employee ID numbers, employee signature on pledge forms, and completed information on the back of drawing tickets. After this review, the forms are recorded on the “Submittal Sheets” and turned in to: Controller’s Office, Room 316, City Hall.

All pledge forms and drawing tickets are due before noon, Tuesday, November 8th in order to be eligible for the Final Drawing, and for the final tally of department donations to determine placement for the end of campaign award categories.

**Q: *Who can I contact if I have additional questions or otherwise need help?***

**A:** Call the Heart of the City Campaign Hotline at (415) 925-2604 or email Michelle Clancy at [mclancy@lic.org](mailto:mclancy@lic.org)

**ANY PAYROLL DEDUCTION FORMS TURNED IN AFTER NOVEMBER 8<sup>TH</sup> MAY BE DELAYED IN PROCESSING AND RESULT IN PLEDGES NOT BEING WITHDRAWN FROM PAYCHECKS BEGINNING IN JANUARY.**

## Federal Pension Protection Act of 2006

Despite its name, this Act of Congress passed in August 2006 includes, in its provisions, guidance to donors of charitable contributions. The Act specifies what forms of substantiation for a charitable contribution an individual must have in his/her records in order to qualify for a charitable deduction.

Regardless of the contribution amount, beginning January 2007, donors must maintain a reliable written record of a contribution in order to claim it as a charitable deduction.

For payroll deduction givers

- If a donor intends to claim a charitable deduction, it is required that he/she retain on file the following:
- The pay stubs or a W2 showing the total deducted for charitable contributions during the year.  
AND
- The pink copy of the pledge form. (Per the requirements, the Federations are revising the pledge forms for all campaigns to include the statement, “No goods or services were received in consideration of this gift.”)  
-OR-
- A letter from the Federation(s) that processed the gift(s) stating the name of the organization(s), the amount of the gift(s), the date or period of the contribution, and the “no goods or services” statement.
- It is recommended that donors who plan to claim a charitable deduction provide their name and contact information on the pledge form in the acknowledgement section. With this contact information, the Federation(s) can provide the letter(s) of substantiation.

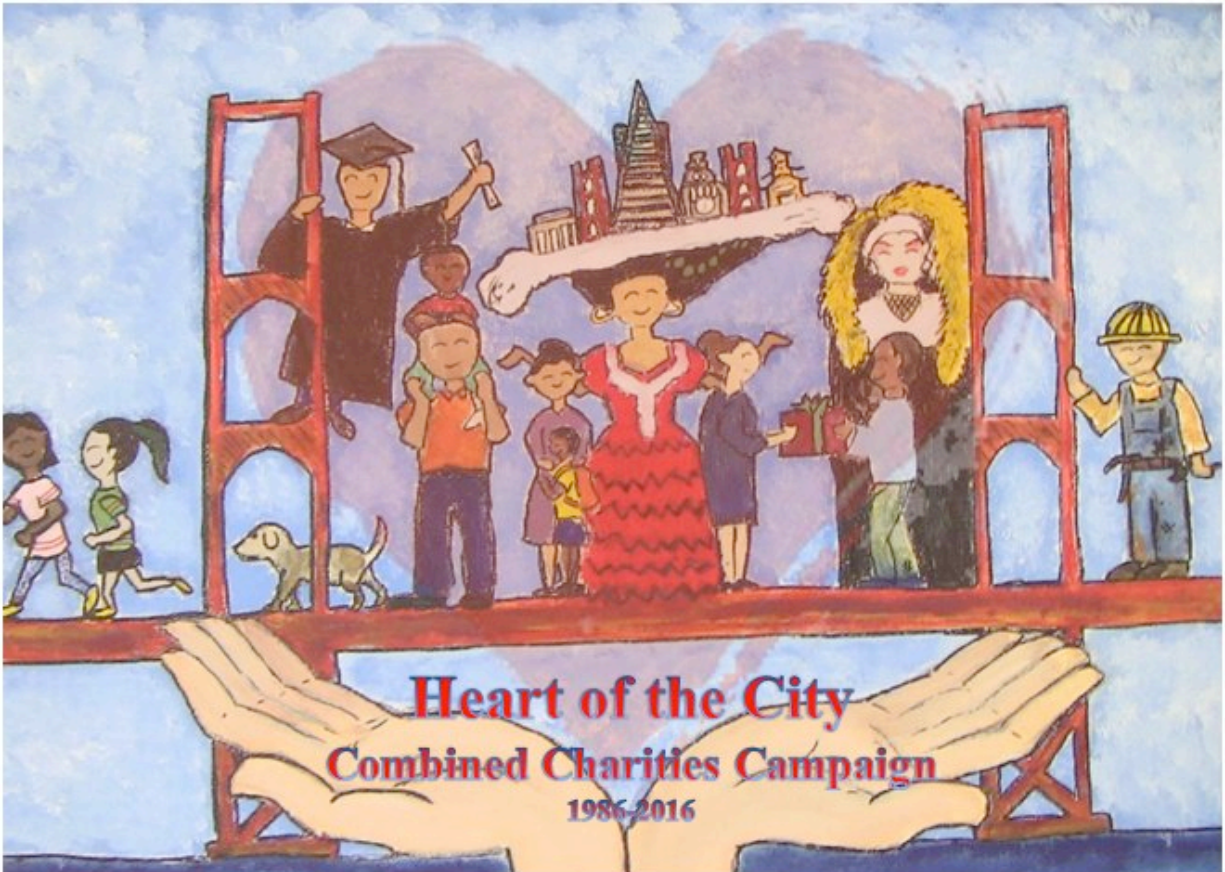
For one-time check/money order/cash givers

- If a donor intends to claim a charitable deduction, and if the contribution is less than \$250, it is required that he/she retain on file the following:
- A bank record (e.g. cancelled check or bank statement; hand written records no longer qualify)  
OR
- A written communication (e.g. receipt, letter) from the Federation that processed the gift that indicates the name of the charity, the date of the contribution, and the amount of the contribution. If the donor received some goods or services in exchange for the contribution (such as a meal or a token gift), then the letter must specify the amount for which no goods or services were received.
- If a donor intends to claim a charitable deduction, and if the one-time donation is \$250 or more, the letter of substantiation containing the “goods or services” explanation is required.
- It is recommended that donors who plan to claim a charitable deduction provide their name and contact information on the pledge form in the acknowledgement section. With this contact information, Federation(s) can provide the letter(s) of substantiation.

For either payroll deduction or one-time gifts, when a donor requires a letter of substantiation for tax purposes and has not received one, he/she shall contact the appropriate Federation(s) directly.

**CITY and COUNTY  
OF SAN FRANCISCO**

**2016 Combined Charities Campaign  
October 3 – October 31, 2016**



**Blank Forms**

**Submittal Sheet**

**Sample Pledge Form**

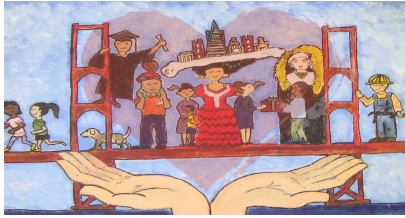
**Additional Supplies Request Form**

**Speaker Request Form**

**Drawing Instructions**

**Drawing Ticket Request Form**

<http://www.sfgov.org/charity>



**2016 COMBINED CHARITIES CAMPAIGN  
SUBMITTAL SHEET**

**Department Captains**, please deliver completed Submittal Sheet, pledge forms, checks and drawing tickets each week to your Coordinator. **NO CASH DONATIONS**

**Department Coordinators**, please deliver Submittal Sheets, etc. each week to the Controller's Office, Room 316, City Hall, 1 Dr. Carlton B. Goodlett Place. Pledge forms will be picked up weekly to be calculated for the weekly report.

\*\*\*\*\* to be completed by Department Captain \*\*\*\*\*

**PLEASE PRINT**

**Captain's Name:** \_\_\_\_\_

**Work Phone No.:** \_\_\_\_\_

**Department #:** \_\_\_\_\_

**Department Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

|    | Donor First & Last Name | Annual Payroll Deduction | Check | TOTAL GIFT |
|----|-------------------------|--------------------------|-------|------------|
| 1  |                         |                          |       | \$ -       |
| 2  |                         |                          |       | \$ -       |
| 3  |                         |                          |       | \$ -       |
| 4  |                         |                          |       | \$ -       |
| 5  |                         |                          |       | \$ -       |
| 6  |                         |                          |       | \$ -       |
| 7  |                         |                          |       | \$ -       |
| 8  |                         |                          |       | \$ -       |
| 9  |                         |                          |       | \$ -       |
| 10 |                         |                          |       | \$ -       |
|    | <b>TOTALS</b>           | \$ -                     | \$ -  | \$ -       |

\*\*\*\*\* to be completed by Department Coordinator \*\*\*\*\*

**PLEASE PRINT**

**\*\*Report Number:** \_\_\_\_\_

**Coordinator's Name:** \_\_\_\_\_

**Work Phone Number:** \_\_\_\_\_

**Date:** \_\_\_\_\_

\*\* Report Number will reflect the running total of Submittal Sheets from your department

**For forms and other information, please go to the Combined Charities website at:**

**[www.sfgov.org/charity](http://www.sfgov.org/charity)**

## INSTRUCTIONS FOR COMPLETING SUBMITTAL SHEETS

1. The Submittal Sheet has been set up so that you can use it electronically as a spreadsheet.
2. Start by doing "Save as" and naming your sheet. This way you will have an electronic record of all your Submittal Sheets, which should make numbering them easier. You can also copy the Captain and Coordinator info from one Sheet to the next. Coordinators should be sure to change the Report Number.
3. Simply key in the donor's name and the amount in the appropriate column. You do not have to enter \$ signs. And here's the best part: you do **NOT** have to add any of the rows/columns. The formulas are already entered and will automatically provide totals.
4. If you prefer, you can print out the Submittal Sheet, enter names and numbers, and total rows and columns by hand.
5. After completion, print out a copy of the Sheet and attach pledge forms, checks and drawing tickets. Captains will get forms, etc. to their respective Coordinators each week. Coordinators will get forms, etc. to the Controller's Office on a weekly basis.

# 2016 San Francisco Combined Charities Campaign

PER PAY PERIOD  \$20 x 26 pay periods = \$520  \$10 x 26 pay periods = \$260  
 \$5 x \$26 pay periods = \$130  \$ \_\_\_\_\_ x 26 pay periods = \$ \_\_\_\_\_

TOTAL CONTRIBUTION  
 Total Payroll Deduction \$ \_\_\_\_\_  
 Total One-Time Check \$ \_\_\_\_\_

ONE TIME DONATION BY CHECK Please make checks to agencies payable to the Federation(s) with which they are affiliated.  
 \$500  \$100  \$ \_\_\_\_\_ For unaffiliated (Donor Choice) agencies see 6 & 7 on back. Attach your check(s) to this form.  
 \$500 = Leadership Giver

TOTAL ANNUAL GIFT \$ \_\_\_\_\_

|           |            |      |        |                 |
|-----------|------------|------|--------|-----------------|
| Last Name | First Name | M.I. | Dept # | Department Name |
|           |            |      |        | Work Phone      |

DSW# (For Payroll Deduction Only)  -








Employee Signature (Required for Payroll ID Deduction Only) \_\_\_\_\_

Note: To be thanked by Federation or agency of your choice, please complete the following information, otherwise your gift will be considered anonymous.

Street Address \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_

Email Address \_\_\_\_\_ Page \_\_\_\_\_ of \_\_\_\_\_

I would like to remain anonymous

| Code   | Agency Name   | Annual Gift |
|--|---|-------------|
| <br>L2000                 | Local Independent Charities Administrative Fee 1.8%   | \$ _____    |
|  | _____   | \$ _____    |
|  | _____   | \$ _____    |
|  | Total pledges to Federation and Federation Affiliates | \$ _____    |
| <br>A800                  | Asian Pacific Fund Administrative Fee 9%              | \$ _____    |
|  | _____   | \$ _____    |
|  | _____   | \$ _____    |
|  | Total pledges to Federation and Federation Affiliates | \$ _____    |
| <br>100                  | Bay Area Black United Fund Administrative Fee 14%     | \$ _____    |
|  | _____   | \$ _____    |
|  | _____   | \$ _____    |
|  | Total pledges to Federation and Federation Affiliates | \$ _____    |
| <br>999                 | Community Health Charities Administrative Fee 5%      | \$ _____    |
|  | _____   | \$ _____    |
|  | _____   | \$ _____    |
|  | Total pledges to Federation and Federation Affiliates | \$ _____    |
| <br>A-001               | EarthShare California Administrative Fee 14.3%        | \$ _____    |
|  | _____   | \$ _____    |
|  | _____   | \$ _____    |
|  | Total pledges to Federation and Federation Affiliates | \$ _____    |
| <br>10187               | Global Impact Administrative Fee 11.64%               | \$ _____    |
|  | _____   | \$ _____    |
|  | _____   | \$ _____    |
|  | Total pledges to Federation and Federation Affiliates | \$ _____    |
| <br>United Way Bay Area | Administrative Fee 15%                                | \$ _____    |
|  | _____   | \$ _____    |
|  | _____   | \$ _____    |
|  | Total pledges to Federation and Federation Affiliates | \$ _____    |

**Donor Choice Plan:** See Pledge Form Guidelines (5C) on the back of this form before completing this section. 11% processing fee may apply To designate to an agency not listed, please enter your choice and provide address in this section. The agency must be a qualified tax-exempt organization.

Agency \_\_\_\_\_ \$ \_\_\_\_\_  
 Address \_\_\_\_\_  
 City/State \_\_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_ Tax ID# \_\_\_\_\_

Agency \_\_\_\_\_ \$ \_\_\_\_\_  
 Address \_\_\_\_\_  
 City/State \_\_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_

Grand Total Annual \$ \_\_\_\_\_

ORIGINAL - WHITE

FEDERATION - YELLOW

DONOR - PINK

No goods or services are provided in consideration of the contribution(s) pledged on this form.

RETAIN PINK COPY OF THIS FORM FOR TAX PURPOSES

NO CASH ACCEPTED

NO CASH ACCEPTED

NO CASH ACCEPTED

# Pledge Form Guidelines






1. **Decide to whom you wish to give and how much to each.** Refer to the brochure for information about the Federations, their affiliated organizations, and their code numbers. Decide if you will give an annual payroll deduction and/or a one-time donation.
2. **Fill out your name, department number, department name and work phone number.** This will allow us to contact you if we have any questions.
3. **Fill in your DSW#.** Your DSW is required for payroll deduction (and is optional for one-time gifts).
4. **Sign the form.** Your signature is required for payroll deduction (and is optional for one-time gifts).
5. **Acknowledgement** – To receive a thank you for your donation to a Federation or agency, complete the portion of the form below your signature with a legible, valid email or mailing address. If you do not complete this portion, your donation will be considered anonymous and your name will not be released to the agency.
6. **Indicate to which charity(ies) you wish to give.**
  - A. **Federations** – Write the amount on the top line across from the name.
  - B. **Charity within a Federation** – Write the code # (if available), name and amount on the line.
  - C. **Donor Choice** – If the charity you wish to donate to is not listed in the brochure, you may designate any IRS tax exempt charity that is not listed in the campaign brochure under a Federation. If we are unable to determine that your choice is eligible to receive tax deductible donations, your donation will be returned to you. We use [www.guidestar.org](http://www.guidestar.org) and other sources to determine tax deductibility. We will process contributions to a religious organization without evidence of its tax-exempt status, but be aware that your contribution is tax-deductible only if the organization complies with federal tax requirements. You are responsible for determining whether the organization complies. Member agencies written under donor choice will be forwarded to appropriate Federation. Minimum Payroll Deduction gifts: \$2 per pay period. Minimum one-time gifts: \$25, please make check(s) payable to selected charity(ies) and provide full address. **Donor Choice contributions are subject an 11% processing fee.**
  - D. **Not Enough Room – use another form.** Write in your name, department and work phone. Fill-in the \_\_\_\_\_ page of \_\_\_\_\_ pages on the bottom right of the form and staple the two forms together.
7. **Annual Payroll Deduction** – Write your employee number (from your payroll stub) in the box and sign the form. You must give in multiples of 26 (pay periods). In the upper left corner of the form, indicate how much you wish to give per pay period. Please note that there is a minimum of \$1 per pay period for gifts to Federations and their charity groups, and \$2 per pay period for any Donor Choice charity. List your yearly amount in the total contribution section. Payroll deductions are distributed to charities on a quarterly basis.
8. **One-Time Donation** – If you are giving to a Federation or a charity listed under a Federation write check(s) to the Federation(s), one check per Federation. If you are giving to a non-federated agency through Donor Choice (see 5.C. above) please provide full address and make check payable directly to the charity. There is a minimum one-time gift amount of \$25. List the total donation at the top of the page under One-Time Donation and under Total Contribution. Staple your check(s) to this form.
9. **Total Annual Gift** – Add up your payroll deduction and one-time gift(s).
10. **Turn in your pledge form to your Department Captain or Coordinator.**
11. **For further information** contact our **website at <http://www.sfgov.org/charity>** or call our **Donor Hotline at (415) 925-2604.**

## What Your \$\$ Buys







### \$2 per month

-  Healthy meals for a homeless person in your community
-  Shoes, clothes and winter coats for families in need
-  Adoption of one dolphin, which helps ensure that tuna remains truly dolphin-safe
-  Oral hydration therapy for 10 children for one year in Asia, Africa or Latin America
-  1 social or recreational outing for a person with developmental disabilities
-  Provides a day meal at summer camp for disadvantaged youth

### \$10 per month

-  Provides a surgical kit with essential instruments for emergency exams and basic surgery in the poor areas of the world
-  Fresh produce at wholesale prices for low-income families
-  1 week at summer day camp for a child with sickle cell disease
-  Provides educational materials resources and services to AID's patient and their families
-  Sponsors a major clean-up of a seven-mile stretch of river of household debris, construction and auto parts

### \$25 per month

-  1 airline ticket for a family member to see a terminally ill loved one
-  Holiday meals for homebound patients
-  A semester-long, hands-on high school classroom series on environmental health and the urban environment
-  Supplementary dry feeding kit—enough to feed 500 malnourished children in the poorest areas of the world
-  Day care for a child of a mother who is receiving job training
-  Provides educational software for 3 computers for youth at-risk

**Leadership Givers Recognition** – If you contribute over \$500 annually either through payroll deduction or one-time gift or both, you will receive a special SF City and County Combined Charity Campaign Lapel Pin. Please ask your Department Captain or Coordinator for more information.





**CITY and COUNTY OF SAN FRANCISCO**  
2016 Combined Charities Campaign

Additional Supplies Request Form

**PLEASE ALLOW UP TO 48 HOURS FOR AVAILABILITY.  
MATERIALS MAY NOT BE READY SAME DAY AS  
REQUESTED**

|   | Amount |
|---|--------|
| Please send pledge forms                | _____  |
| Please send combined campaign brochures | _____  |
| Please send additional drawing tickets  | _____  |

**Please complete and print clearly.**

Name: \_\_\_\_\_

Department: \_\_\_\_\_

Work Address: \_\_\_\_\_

City: \_\_\_\_\_ Zip: \_\_\_\_\_

Work Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

**Copy this form as needed or download from website  
<http://www.sfgov.org/charity>**



**CITY and COUNTY OF SAN FRANCISCO**  
2016 Combined Charities Campaign

Speaker Request Form

\_\_\_ Charity Fair

\_\_\_ Department Training

\_\_\_ Presentation

**Complete form and FAX to:**

**Michelle Clancy**

Local Independent Charities

Fax: (415) 925-2650

Campaign Hotline: (415) 925-2604

**Please try to provide *at least 72 hours* notice to fill these requests (obviously the more notice, the better). Additionally, please bear in mind fulfilling a request for a particular speaker or organization is not always possible. It is best to keep requests more generalized.**

Department: \_\_\_\_\_

Captain/Coordinator: \_\_\_\_\_ Phone: \_\_\_\_\_

Contact Person on Site: \_\_\_\_\_ Phone: \_\_\_\_\_

Event Day & Date: \_\_\_\_\_ Audience Size: \_\_\_\_\_

Start Time & Length of Meeting: (i.e. 9:00 – 10:00 am): \_\_\_\_\_

Max # of speakers desired: \_\_\_\_\_

Length of each speaker's presentation: (i.e. 30 min): \_\_\_\_\_

Street Address, Floor & Room: \_\_\_\_\_

\_\_\_\_\_

Speaker check-in instructions: \_\_\_\_\_

\_\_\_\_\_

Comments: \_\_\_\_\_

\_\_\_\_\_

**Copy this form as needed or download from website**  
**<http://www.sfgov.org/charity>**

### Drawing Instructions

Please note that on the day of the drawings *only broken apart tickets that are filled out completely with the recipients' information on the back will be accepted.* **All Coordinators/Captains are responsible for the security of drawing tickets.**

Employees will be given one drawing ticket for every \$26 donation/pledge. A \$25 one-time donation will also qualify for ONE drawing ticket. A chart for computing the number of drawing tickets is below:

| Donation | Tickets | Donation | Tickets |
|----------|---------|----------|---------|
| \$26     | 1       | \$286    | 11      |
| \$52     | 2       | \$312    | 12      |
| \$78     | 3       | \$338    | 13      |
| \$104    | 4       | \$364    | 14      |
| \$130    | 5       | \$390    | 15      |
| \$156    | 6       | \$416    | 16      |
| \$182    | 7       | \$442    | 17      |
| \$208    | 8       | \$468    | 18      |
| \$234    | 9       | \$494    | 19      |
| \$260    | 10      | \$520    | 20      |

Please do not make photocopies of these tickets. Only tickets provided by the campaign will be accepted for inclusion in the drawing. **EACH TICKET MUST HAVE THE EMPLOYEE'S NAME, DEPARTMENT, & WORK PHONE NUMBER CLEARLY PRINTED ON THE BACK BEFORE THEY ARE SUBMITTED.** Drawing winners will be announced by their name and department.

Donating employees are to complete EACH ticket and return it to their captain. Some captains and coordinators have made labels with the employee's information to stick on the tickets, in order to help the donor expedite this process. The captain records the number of tickets issued on the submittal form and forwards tickets to coordinators, who in turn submit to Office of the Controller, Room 316, City Hall, 1 Dr. Carlton B. Goodlett Place, San Francisco, 94102. Please visit the campaign website at <http://www.sfgov.org/charity> to view a complete list of prizes.

#### **Instruction for non-donors or employees contributing less than \$25 who wish to receive a drawing ticket:**

The drawing is open to ALL City and County employees whether or not they choose to participate in the campaign. Non-donors, or employees contributing less than \$25, may participate in the drawing by completing a Drawing Ticket Request Form. Each person of this description will receive one drawing ticket.

Once the employee has completed the request form, the Coordinator or Captain will give them one drawing ticket, and turn in this form plus their completed drawing ticket along with their submittals.



**CITY and COUNTY OF SAN FRANCISCO  
2016 Combined Charities Campaign**

**Drawing Ticket Request**

I do not wish to contribute to the 2016 Combined Charities Campaign; however, I would like to enter my name in the drawing for the donated prizes.

**-or-**

I am contributing less than \$26 to the 2016 Combined Charities Campaign.

Please enter my name into the drawing.

Employee Name: \_\_\_\_\_

Employee ID #: \_\_\_\_\_

Department: \_\_\_\_\_

Address: \_\_\_\_\_

Work Telephone: \_\_\_\_\_

Signature: \_\_\_\_\_

**Below to be completed by Coordinators or Captains ONLY**

Campaign Coordinator/Captain: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*Please submit this form and completed drawing ticket  
with your submittal and pledge forms.*

**Copy this form as needed or download from website  
<http://www.sfgov.org/charity>**