City and County of San Francisco

Combined Charities Campaign

Heart of the City

2019

Big City, Bigger Heart

Kick Off and Training Event

September 5, 2019
Welcome and Thank You

Agenda

• Welcome from Campaign Chair – Linda Yeung
• Sheriff – Sheriff Vicki Hennessy
• MEA – Crispin Hollings
• Federations/Charity Speakers
• Training
• Q&A
• Thank You
# Steering Committee Members

<table>
<thead>
<tr>
<th>Member</th>
<th>Agency</th>
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<tbody>
<tr>
<td>Linda Yeung, Campaign Chair</td>
<td>Airport Commission (AIR)</td>
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<tr>
<td>Krystie Scull, Federation Lead</td>
<td>Community Health Charities</td>
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<tr>
<td>Christie Beetz</td>
<td>Controller’s Office (CON)</td>
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<td>Crispin Hollings</td>
<td>Sheriff (SHF)</td>
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<tr>
<td>Darlene Armanino</td>
<td>Retirement Services (RET)</td>
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<tr>
<td>Dave Coyle</td>
<td>EarthShare California</td>
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<tr>
<td>Joan Lubamersky</td>
<td>City Administrator (ADM)</td>
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<td>Joan Van</td>
<td>Asian Pacific Fund</td>
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<td>John Murray</td>
<td>Human Services (HSA)</td>
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<td>Kimberly Ng</td>
<td>Police (POL)</td>
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<td>Lauren Rutledge</td>
<td>Global Impact</td>
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<td>Martha Whetstone</td>
<td>Airport Commission (AIR)</td>
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<tr>
<td>Michelle Clancy</td>
<td>America’s Best Local Charities</td>
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<td>Natalie Prendergast</td>
<td>Department of Technology (TIS)</td>
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<td>Robert Ward</td>
<td>Sheriff (SHF)</td>
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<tr>
<td>Verma Walton</td>
<td>Public Utilities Commission (PUC)</td>
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<td>Virginia Sunday</td>
<td>Airport Commission (AIR)</td>
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2018 Campaign Totals

• Total Dollars ($) raised: $1.41 million
• Donors: 4793 (15%)
• Leadership Givers: 1159 (24%)
• Amount ($) raised by Leadership Givers: $876K (62%)
• Payroll Pledge total: $1.23 mil (87%)
• Check Pledge total: $186K (13%)

Let’s try to make this year even better!
Campaign Totals – Year over Year

<table>
<thead>
<tr>
<th>Year</th>
<th>Total</th>
<th>Payroll</th>
<th>Check</th>
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<tbody>
<tr>
<td>2018</td>
<td>$1,413,177</td>
<td>$1,278,200</td>
<td>$185,833</td>
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<tr>
<td>2017</td>
<td>$1,412,386</td>
<td>$1,235,891</td>
<td>$227,556</td>
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<tr>
<td>2016</td>
<td>$1,358,190</td>
<td>$1,184,830</td>
<td>$235,891</td>
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<tr>
<td>2015</td>
<td>$1,313,051</td>
<td>$1,122,999</td>
<td>$233,145</td>
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<tr>
<td>2014</td>
<td>$1,256,875</td>
<td>$1,041,323</td>
<td>$215,552</td>
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<tr>
<td>2013</td>
<td>$1,212,344</td>
<td>$1,079,906</td>
<td>$235,891</td>
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Top Giving Departments

- Airport Commission $211K
- Police $166K
- Municipal Transportation Agency $158K
- Fire Department $114K
- Public Utilities Commission $71K
- Public Health $71K
- Department of Technology $71K
- Public Works $53K
- Sheriff $50K
- Human Services $48K
- Emergency Communications Dept $42K
- Administrative Services $45K
- Port $25K
- Public Library $23K
- Recreation and Park $23K
- City Attorney $14K
Our Accomplishments in 2018

• Removal of the Donor’s Choice 11% fee for checks;
• Development of an online and mobile friendly donations program;
• Reduction of paper forms and brochures in support of the City’s sustainability goals;
• Creation of website that gave real time donations by department and Federations;
• Expedition of checks being mailed to Federations and Donor’s Choice charities by year end;
• Improved appreciation events for the Leadership Givers and our hardworking Captains and Coordinators;
Leadership Giving

• Consider giving at a level of **$500 or more** ($20 per pay period)

• Submit your pledge by Wednesday, October 16 to be invited to the Leadership Appreciation Event

• Leadership Appreciation Event is on Tuesday, October 22, 9-11 am at City Hall

• Receive the coveted annual leadership pin to wear proudly
2019 Goal

$1.5 Million
Sheriff Vicki Hennessy
Raffle!
Federations and charity presentations
Our Charity Partners are fighting chronic illness and disease
Providing life saving services and support
Funding research for a cure
Select a charity of your choice or cause fund

Women’s Health
EMPOWER WOMEN TO LIVE HEALTHIER

Every Kid Deserves®
HELP CHILDREN LIVE HEALTHIER LIVES

Hero’s Health
THEY FIGHT FOR US. LET’S FIGHT FOR THEM.
CHARITY PARTNERS

At Community Health Charities our partners are our charities. We invite you to look through our list of trusted health charities and give to a cause that matters to you.

[Logos of various charities]
Mission: To improve human health and well-being through the animal bond

Therapy Animal Program assists veterans with PTSD, seniors living with Alzheimer’s, students with literacy challenges, patients in recovery, people with intellectual disabilities, and those approaching end of life.

At Pet Partners, we believe that the human-animal bond is a mutually beneficial relationship that improves the physical, social, and emotional lives of those we serve.
Where children with serious medical conditions celebrate just being kids!

Through innovative, camp-based programs that offer a great big dose of fun and support, children with more than 30 medical conditions visit The Painted Turtle each year, reclaiming the joys of childhood.
Bay Area API serving member charities

Asian and Pacific Islander languages

Ethnic groups
1 out of every 2 API youth experienced bullying

Not seeking medical care at community health clinics

Domestic violence crimes are going unreported
YOUR DONATION HELPS...

Bullied API youth receive mental health counseling

Eligible residents become US citizens gaining them rightful access to services like medical care

Domestic violence clients move to safe housing and access to legal services
$2 per month provides food and shelter for a homeless person

$5 a month, for a year, provides enough food for one Veteran assistance dog for 2 months

$10 a month provides pre-adoption medical care and micro-chipping for 10 animals looking for their furrever home.
EarthShare California
Some of the many EarthShare member charities

We deliver a diverse list of trusted and annually vetted local and national environmental and conservation charities. Below are just a few supported by EarthShare’s mission and our employer partners:

[Logos of various environmental and conservation charities]
PUT YOUR **PASSION** TO WORK

Share the Earth. Share the responsibility.

[EarthShare logo]
GLOBAL IMPACT

Change the World.
Give Global.

charity.org/give
We represent 100 international charity partners.

charity.org/give
736 million people live on less than $1.90

1/3 of working age people in low and middle income countries lack the skills to get quality jobs.

An estimated 40 million people around the world are victims of modern slavery.

Every day, about 830 women die from preventable causes related to pregnancy and childbirth.

charity.org/give
Training

• Key Campaign Dates and New Materials
• Coordinator/Captain Role
• Best Practices for Workplace Giving
• Pledging – Payroll vs. Check
• Submittal Sheets
• Donor’s Choice/Write-In Charities
• Website (heartofthecity.sfgov.org)
• Donation Workflow – Online vs. Paper
• Online Application & Dashboards
• Q&A Session
Key Campaign Dates and Schedule

Thursday, Sept 5
Kick Off & Training Event at City Hall, North Light Court

Wednesday, Oct 9
Coffee Card Drawing (Deadline Oct 4, 5pm)

Tuesday, Oct 22
Leadership Appreciation Event at City Hall, North Light Court (Deadline Oct 16, 5pm)

Wednesday, Oct 23
Drawing #2 (Deadline Oct 18, 5pm)

Thursday, Oct 31
Campaign Officially Ends

Friday, Nov 1
Drawing #3 (Deadline Oct 29, 5pm)

Tuesday, Dec 3
Giving Tuesday

Wednesday, Dec 11
Final Drawing (Deadline Dec 6, 5pm)

Friday, Dec 6
Last Day to Give

Tuesday, Feb 11
Citywide Captains & Coordinators Appreciation Event & Award Ceremony at City Hall, North Light Court
New This Year – Postcards!

Heart of the City

The City & County of San Francisco “Heart of the City” Combined Charities Campaign is a great way to give back to help our communities locally and globally. Through your generosity, we can reach this year’s goal to raise $1.5 million for charity.

To donate, simply go online to heartofthecity.sfgov.org!

We are a Big City, with an even Bigger Heart.

Thank you for participating in this important Campaign!

If you have any questions, please contact us:
Email: heartofthecity@sfgov.org
Phone: (415) 821-HOTC (4682)

Campaign Schedule

- **Thursday, Sept 5**
  Kick Off & Training Event at City Hall, North Light Court

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  Campaign Begins

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Coordinator/Captain Role

• Pass out postcards, brochures, and forms to each employee
• Encourage online donations!
• Provide weekly communication on the campaign and the link to donate: heartofthecity.sfgov.org
• Collect paper forms and enter forms with checks into the system
• Help employees who have questions and would like to give online
• Look at your Department’s Dashboard frequently
• Submit forms to the Controller’s Office each Friday to:
  Office of the Controller
  1155 Market St. – 5th Floor Payroll Division
Best Practices for Workplace Giving

• Build a **team** including management support and captains
• Make 100% Ask
• Host an event and dedicate a few minutes to a weekly/monthly staff meeting
• Offer food/refreshments as an incentive
• Keep the campaign visible with posters, emails, and “I Gave” stickers
• Don’t be shy about sharing the Campaign with your coworkers!
• Highlight the convenience and affordability of payroll deduction
• Encourage employees to give to a charity or cause that matters to them
• Utilize and share the website [heartofthecity.sfgov.org](http://heartofthecity.sfgov.org)
Pledging – Payroll vs. Checks

**Payroll**
- Convenient and Affordable
- Deductions start the first pay period of January and end the last pay period of December
- It is the best method of giving for Employers, Donors, and Charities
- **New This Year** – One Time Payroll Deduction
- **New This Year** – Controller’s Office will enter all Payroll Deductions. Captains and Coordinators just need to turn in forms to CON

*Formally affiliated with United Way Bay Area organizations are all Donor’s Choice, with the exception of 9 Charities now under Asian Pacific Fund, and United Way as a charity under America’s Best Local Charities*

**Checks**
- One time checks
- Review checks for accuracy:
  - Checks to any charity listed in the Brochure must be made payable to the affiliated **Federation**
  - Checks to any Donor’s Choice Charity must be made payable to the **Charity***
- **New This Year** – Captains and Coordinators will enter checks only in the donation portal at heartofthecity.sfgov.org
- Make a scan of original redacted checks. Upload the scan to that donation in the online application
Submittal Sheets

• Must be completed to **track all paper pledge forms and checks**

• **New This Year:** Complete the three (3) submittal sheets by pledge type
  1. Donations with **Payroll Only**
  2. Donations with **Check Only**
  3. Donations with **Payroll and Check**

• When submitting checks, a original paper forms or printed confirmation must be turned in with checks and submittal sheet

• All submittal sheets must be submitted to the Controller’s Office **each Friday by 5pm** for drawings

  Office of the Controller - 1155 Market Street 5th Floor, Payroll Division
Donor’s Choice/Write-In Charities

• Donor’s Choice are for charities of your choice not affiliated with the Campaign. You can always verify by searching in heartofthecity.sfgov.org

• Charity must be a valid 501(c)(3) and donor must provide charity name, address, phone #, and Federal tax ID number/Employee Identification Number (EIN)

• Check donations have no administrative fee. Payroll deductions have an administrative fee of 11%

• The City will forward all Check donations to the Lead Federation in December
Big City, Bigger Heart

The City and County of San Francisco "Heart of the City" Combined Charities Campaign is kicking off the 2019 Campaign! Combined Charities is a great way for CCSF employees to give back to help our communities locally and globally. Last year, we raised more than $1.4 million for over 1,200 non-profit organizations in our communities. 4,700 employees (or 15%) participated in the campaign. Of this group, 1150 (or 24%) were leadership givers that donated over $500 and contributed over 60% of the dollars raised.

Our goal this year is to raise $1.5 million. Please take time today to give. We are a Big City, with an even Bigger Heart.

Your central hub for the Campaign’s information, materials, and Online Donation Application.

Remember donating online is the easiest way to pledge!
Electronic Pledging: Self Service

1. Employee wants to donate
   - Go to heartofthecity.gov.org
   - User authenticates using IAM

   NEW: No signature required

2. Input Donation
   - Write check, if applicable

3. Review Pledge
   - Must print confirmation if donating via check

4. Confirmation and Receipt Emailed
   - Give check + confirmation to Captain / Coordinator if donating via check

5. Online Payroll Deduction Pledge Complete
Paper Pledges

For employees without internet/computer access at work

1. Employee wants to donate
2. Complete Paper Pledge Form
3. Give to Captain Coordinator
4. Review Pledge, request information if needed
5. Send to Payroll Only Submittal Sheet
6. Write check(s), if applicable
7. Give to Captain Coordinator
8. Review Pledge request information if needed
9. Enter Pledges with Checks into the Application, Upload Portion
10. Captain Logs In
11. Enter onto Checks Only Submittal Sheet

* If donation contains both payroll and check, enter onto the Payroll and Check Submittal Sheet.
Pledge Confirmation

- Captain wants to confirm pledge
- Go to heartofthecity.gov and authenticate with IAM
- Search, locate, and validate donation pledge in the Admin Portal
- Upload any required forms and/or redacted checks
New this Year – Identity Access Management (IAM)

- Employees can authenticate with:
  - **Username:** DSW Number
  - **Password:** CCSF Password
- Self service donations no longer require a printed copy with a wet signature!
- This will save time and paper, and allow you to spend more time promoting the Campaign!
New This Year – Past Donations

Pledge Information

America's Best Local Charities

10,000 Degrees

Check Amount: $260.00
Total Donation: $260.00
Payroll Amount: $260.00
Live Demo of Online Application
Admin Portal – Pledge Status & Reports

- **Unverified Donations** – Require Captains/Coordinators to upload physical documents such as forms/checks

- **Verified Donations** – No other action required. Ready to be processed

- **Completed Donations** – Controller’s Office has processed donations for payroll OR the Airport has processed checks for CHC to distribute

- **Past Donations** – Captains and Coordinators can view donations prior year’s donations (2018)

- **Voided Donations** – Donations that are cancelled by Captains/Coordinators

- **New Dashboard Report** that shows employees whom you can encourage to give!
Contact Us

Website
www.heartofthecity.sfgov.org

Email
heartofthecity@sfgov.org

Hotline
650-821-HOTC (4682)
Thank you for coming!