



pennsylvania

STATE EMPLOYEE COMBINED APPEAL

2018 State Employee Combined Appeal

Agency Coordinator's Guide

Thank you for serving as an agency coordinator for the SECA campaign! Agency coordinators play a pivotal role in managing the campaign within each commonwealth agency. Your leadership, direction and enthusiasm will drive the success of your agency’s campaign and help thousands of people.

This guide provides helpful ideas to help you solicit during the campaign and generate enthusiasm for donating through SECA.

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<p>SECA Campaign Dates <i>(Please see the communications calendar for a comprehensive listing of important dates.)</i></p>	
Date	Event
September 4, 2018	SECA campaign begins
October 26, 2018	SECA campaign ends

PA Office of Administration
 Bureau of Employee Benefits and Services
 State Employee Combined Appeal
 513 Finance Building | Harrisburg PA 17120-0400
 Phone: 717.705.5695
 Email: RA-SECA@pa.gov

AGENCY COORDINATOR QUICK FACTS

How do I use the envelope tracking system?

Prior to sending in your pledge envelopes, enter each one in the envelope tracking system at www.seca.pa.gov. Doing so allows SECA to reconcile any discrepancies between envelopes sent and envelopes received.

Where should I send completed pledge envelopes?

After completing both sides of the envelope to correspond with the pledge forms inside, as well as entering it into the envelope tracking system, it should be sent via interoffice mail or a traceable postal mail method to:

Department of Revenue
Bureau of Imaging and Document Management
1854 Brookwood Street
Harrisburg, PA 17104
Attention: Deborah Stoner

How should the pledge form be completed for an individual donation?

- Be sure the employee completes the first two sections of the form, which relate to their contact and employee identification information.
- Indicate the type and amount of donation in the "employee contribution information" section; instruct employees to carefully read the instructions in this section.
- The employee should check the "acknowledgement information" box if they wish to be acknowledged for their donation by their designated charity.
- The employee should enter the code for their designated charity(ies) in the "agency designations" area, as well as the amount they wish to designate for each charity. Codes can be found in the resource guide.
- The "leadership giving" box should be checked if the employee meets one of the leadership giver levels and they wish to be recognized.
- Employees giving via payroll (recurring or one-time) must sign and date the form.
- For check/money order donations, attach the check/money order with a paper clip.

How should the pledge form be completed for a fundraiser donation?

- Enter "Fund" as the first name and "Raiser" as the last name on the pledge form. Enter your agency name as usual.
- Enter "999999999" as the employee ID.
- Enter the total amount in the "check/money order" box.
- Leave the remaining sections blank (specific charities cannot be designated for fundraisers).
- Paper clip (no staples) a check or money order for the total amount to the form.

Can I send cash for one-time non-payroll donations?

No. Cash donations cannot be processed and will be returned to the agency coordinator. Only check or money order can be accepted.

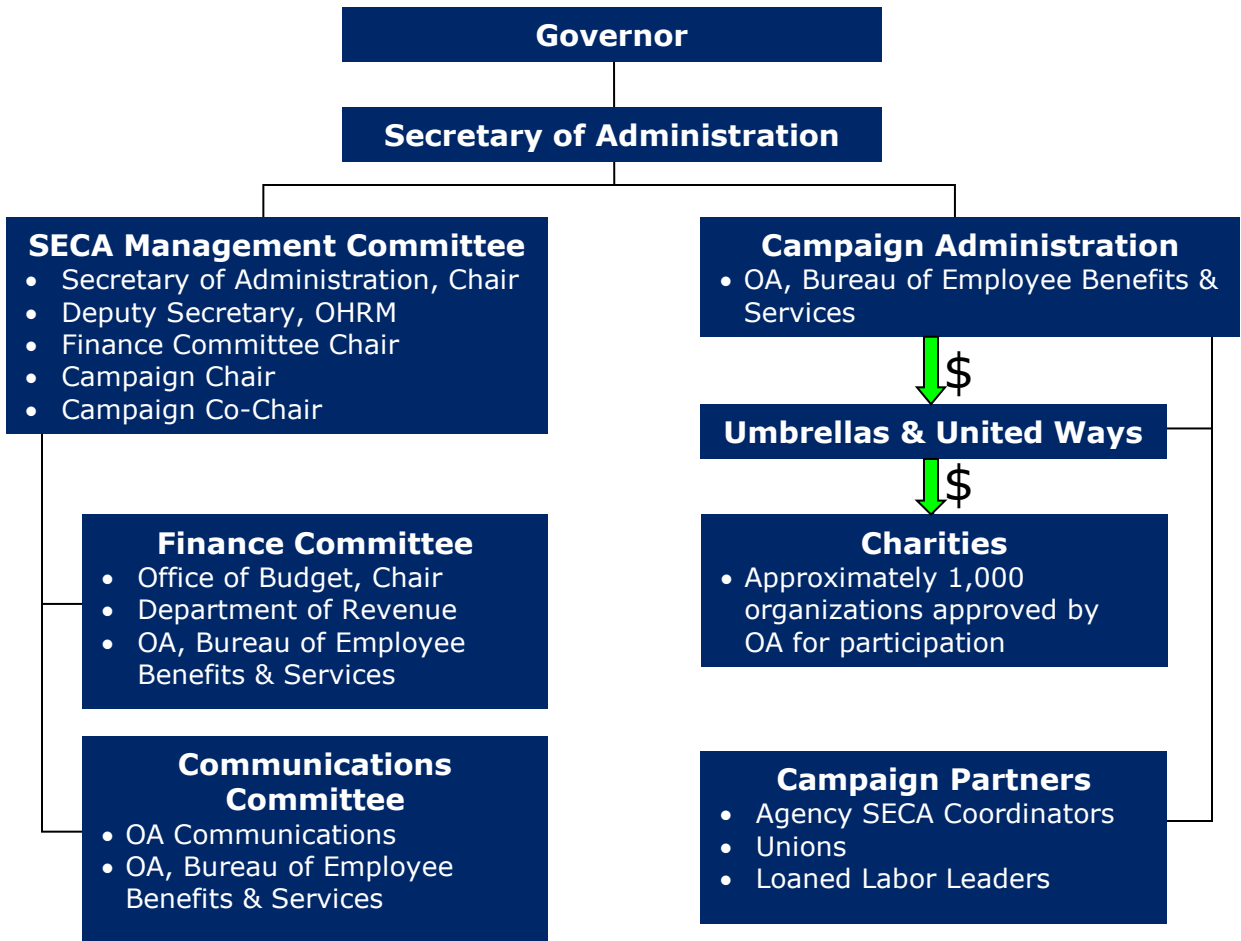
What are the 2018 campaign goals?

The statewide goals are \$3,150,000 and 14,949 donors. Individual agency goal information will be available at www.seca.pa.gov.

How can I see the total donations that have been processed for my agency so far?

Use the SAP transaction Y_DC6_14000236. Enter your agency's business area number and the plan year (the year the donations will be taken out of payrolls). See the "SAP Agency Totals Report" section for more information.

SECA CAMPAIGN STRUCTURE



Indicates flow of donations from SECA to designated charities

THE ROLE OF AN AGENCY COORDINATOR

- Build a team to help throughout the campaign
- Plan and coordinate employee meetings and kickoffs to generate enthusiasm for SECA
- Put up posters and provide pledge forms where needed
- Facilitate the involvement of agency leadership in supporting the campaign
- Educate your agency on SECA and ask employees to donate
- Promote pledging online through Employee Self Service (ESS) for employees who use the commonwealth’s payroll system
- Answer questions about why SECA is important
- Submit envelopes with paper pledges and report those envelopes online at www.seca.pa.gov
- Develop a plan to reach and exceed your agency goal
- Thank employees for their donations and your team for their hard work and support

WHERE TO START

Especially in larger agencies, it is recommended that agency coordinators establish a committee of co-workers who can help with planning. Set up a team to help you organize campaign activities and schedule committee meetings as needed. In agencies with field sites or regions, it is also beneficial to have a point person in each area to plan regional activities, gather pledge forms, etc.

For your committee members and/or field site point person, seek people who:

- Are skilled with communication and creative with promotion
- Are available and willing to ask employees to donate
- Can help reserve conference rooms, send invitations and otherwise coordinate events
- Can help get the word out through intranet site posting or an agency newsletter

Remember that **SECA managers** and **loaned labor leaders** are available to help as well. SECA managers are personnel at local United Way offices who act as SECA contacts and help to campaign among commonwealth employees in their service area. Loaned labor leaders are commonwealth union employees who work full-time on SECA throughout the campaign at a local United Way office. Both can give presentations, distribute supplies, ask employees to donate and can help coordinate events. Contact information for loaned labor leaders (where available) and local United Way SECA managers is available on the SECA website’s [Campaign Contacts](#) page.

INFORMATION COORDINATORS NEED TO KNOW

Theme

This year's campaign theme is "Mission Possible: Accept the Pledge Challenge." This lighthearted theme shows that helping others is an easy challenge to accept. In addition, "Mission Possible: Accept the Pledge Challenge" also offers lots of potential for fundraiser and event ideas.

SECA Goal

SECA sets a dollar goal and participation goal for the campaign each year. The statewide goals are \$3,150,000 and 14,949 donors. Individual agency goal information will be available at www.seca.pa.gov.

Here is a summary of results from the 2017:

Total Amount Raised:	\$3,078 million
Percent of Goal Raised:	97.7%
Total Number of Contributors:	14,260
Percent of Participation:	14.5%

Donation Methods

Employees may donate through biweekly or one-time payroll deductions or by making a one-time donation via check or money order:

- **Payroll Deduction (Recurring or One-Time)**
 - o An easy, automatic and no-hassle way to donate through each of 26 annual pay periods OR through the first payroll of the year only.
 - o May be made through ESS (for agencies in the commonwealth's payroll system) or via paper pledge form.
 - o Payroll deductions begin the first pay date of January 2018 (or the first available pay date if pledge is made after the first pay date).
 - o Pledging through ESS is fast, easy and helps minimize administrative costs.
 - o Most donations are made through payroll deduction.

- **One-Time Check or Money Order Donation**
 - o A single donation made via check/money order (SECA cannot accept cash).
 - o May be made using a paper pledge form.

Charities that Participate in SECA

There are approximately 1,000 charities that employees can support through SECA. These charities fall under one of nine [umbrella organizations](#). The umbrella organizations group together like-minded charities. For example, Global Impact has charities that serve developing nations, while EarthShare Pennsylvania has environmentally focused charities.

If you would like an umbrella organization to speak about SECA charities at any event you schedule, you must invite all umbrella organizations. Contacts for each are listed in the [Campaign Contacts](#) page of the SECA website (for Pennsylvania United Ways, see the Local SECA Managers section and contact the United Way closest to the location of your event.) That way, all participating umbrellas have the opportunity to attend, whether they chose to

or not. In order to remain as fair as possible, individual member charities may not be specifically invited to SECA events. However, if an umbrella organization is not able to attend, they may choose to send a member charity in their place. In this case, the member charity must represent all of the charities under their umbrella, just as the umbrella charity would have if they had attended.

All charities participating in SECA must meet strict eligibility standards established by the Office of Administration. Each year, the Office of Administration reviews an application for every charity participating in SECA. Therefore, employees can feel confident in the charities in SECA.

STRATEGIES FOR A SUCCESSFUL CAMPAIGN

The strategies contained in this section are best practices that will help you run a successful campaign.

Management Support

Senior management's participation and support demonstrates the importance of the SECA campaign. The coordinators' area of www.seca.pa.gov provides a sample letter for your agency head to sign encouraging employees to consider giving through SECA. Work through your agency's chain of command or press office to have a SECA letter signed by your agency head to show that your agency supports SECA.

Develop a Campaign Plan

View the SECA communications calendar in the coordinators' area at www.seca.pa.gov for suggested dates to send messages and hold events. Develop a timeline by filling in your own target dates on the calendar. Think of the culture of your agency and work with your press office when planning communications.

Take Advantage of Loaned Labor Leaders and United Way SECA Managers

Loaned labor leaders are commonwealth union employees released to assist local United Ways during the SECA campaign. SECA managers are local United Way employees who handle SECA duties. Both can help you strategize your campaign and can promote SECA among employees. It is a good idea to reach out to your local SECA manager and loaned labor leader (if one has been assigned to your area) at the beginning of the campaign and to stay in touch throughout.

Kick Start Your Campaign

The most successful campaigns begin with an event such as a rally to help generate enthusiasm. Kick-off events are a way to promote the campaign and for everyone to have fun doing so. SECA managers and loaned labor leaders can help to coordinate kick-off's. Kick-off events usually include the following activities:

- Viewing of the SECA video
- Senior management endorsement
- Umbrella organization presentations
- Testimonials
- Asking employees to donate to SECA

Kick-off events often have themes which can be used to create activities for employees. Some themes that have worked well at prior kick-off events are:

- Academy Awards
- Game Show
- TV Shows
- Broadway
- Sports
- Decade-specific

Employee Meetings

Employee meetings are an opportunity to educate many people at the same time about the value of the SECA campaign and gain their support. Schedule a conference room and send out an invitation by email or publicize it on bulletin boards as your office permits. Or, utilize a previously scheduled meeting and include SECA activities on the agenda.

Ask a loaned labor leader to attend and say a few words. If time allows, invite the umbrella organizations to give a short presentation on the mission of their charities. (You must invite all umbrellas, not just selected ones – see “Information a Coordinator Needs to Know” above.)

Also, co-workers who have personal experiences with one of SECA’s participating charities can share their stories. Compelling testimonials from those who benefited from the services of participating charities can inspire co-workers to give.

Fundraising Events

Consider planning events that will raise money for SECA directly. If you conduct a fundraising event, submit proceeds using a pledge form. (See “Completing Pledge Forms and Report Envelopes” below on how to fill out a form for a fundraiser.)

Specific ideas and suggestions are available in the coordinators’ area at www.seca.pa.gov. Please remember that any prizes provided must be donated by employees and be of a nominal monetary value. You **cannot** solicit businesses for donations for events or use funds from an agency budget to give prizes of monetary value.

Additionally, raffles are not permitted in SECA, as they are considered a small game of chance.

Say “Thank You!”

This is one of the most important parts of the campaign. Here are some suggestions that may be appropriate. It is best to tailor your expression of thanks to your agency’s culture.

- Publish a thank you message in your agency newsletter or intranet site
- Schedule a thank you event and invite everyone to attend
- Thank and recognize all your campaign team members
- Send a letter of thanks from your agency head

COMPLETING & SUBMITTING PLEDGE FORMS AND REPORT ENVELOPES

How Employees Should Complete Pledge Forms

- Complete at least the following sections of the pledge form: Name, Employee ID, Business Area, Employee Contribution Information, and Agency Designations
- Designate a charity(ies) to receive your donation by filling out the appropriate charity code(s) found in the [Resource Guide](#). Indicate how much of your donation should be distributed to each charity. To designate more than four charities, use additional pledge forms (maximum is 10 charities, minimum \$1 per charity).
- To contribute to SECA without designating a charity, simply leave the designation portion of the form blank. Undesignated funds will be distributed proportionately among participating umbrella organizations
- Donations through SECA remain anonymous to the charity selected unless the acknowledgement box in the "acknowledgement information" box is checked. If it is checked, the employee's name and address on file will be provided to the charity receiving the donation. This is different from the leadership giving acknowledgement. If the leadership giving check box on the form is checked, the donor will receive leadership recognition even if they did not opt to receive an acknowledgement.
- If an employee pledges via ESS, it is not necessary to also complete a pledge form.

Making Both a Recurring and One-Time Donation

When an employee wishes to make both a recurring and one-time donation, they should do so using separate pledge forms. The pledge forms should be submitted in different pledge envelopes from one another.

Changing A Payroll Pledge

An employee can change a payroll pledge at any time. To do so, they should fill out and submit a pledge form with their new amount and/or charity designations. When the form is processed by the Department of Revenue, it will overwrite their original pledge. Pledges cannot be changed via ESS.

Cancelling A Payroll Pledge

An employee can cancel a payroll pledge at any time. To do so, they should fill out and submit a regular pledge form with "0.00" as their payroll pledge amount. When the form is processed by the Department of Revenue, it will overwrite their original pledge. Pledges cannot be canceled via ESS.

Completing Pledge Forms for Fundraisers

A pledge form must be completed for each fundraising event. **For tracking purposes, please use only one pledge form per fundraiser.** Also, please remember that all cash donated towards a fundraiser must be converted into a cashier's check or money order before submission to SECA. Two people must count and sign off on the pledge form of the amount raised. Use funds from the fundraiser to pay for any cost associated with converting the cash to a cashier's check or money order.

Please do not complete a pledge form for each person that participates in your fundraiser, but rather submit one pledge form for the entire fundraiser. The cost to process each pledge form is more than \$1, and submitting many pledge forms for small donations increases costs and decreases the amount of funds that could ultimately be passed on to charities.

Complete the first name, last name, and Employee ID# as described in the following table:

Donor Information Section	
First Name:	FUND (First line of pledge form)
Last Name:	RAISER (Second line of pledge form)
Employee Tracking Information Section	
Employee ID#	999999999

In addition, be sure to complete the business area box, and fill in the total amount in the "check/money order" box. Leave the remaining sections blank.

NOTE: Contributions raised by fundraisers will be distributed proportionally among the umbrella organizations/funds. Specific charities may not be designated for fundraiser monies.

Completing the Report Envelope

Place up to 50 pledge forms in one report envelope. Complete the information on both sides of the envelope to correspond with the enclosed pledge forms. The "Total Envelope Contribution" box on the front cover is a summary of the information detailed on the back cover. On the back, list the names and amounts of all contributions in the appropriate area.

The amount for the "recurring payroll deduction" section is the amount per pay period. Add all of the contributions listed to determine the total. Multiply the total by 26 pays per year. Use that total in the box on the front cover.

When you deliver an envelope, track the delivery on the SECA website under the [Envelope Tracking](#) page. For details, see the "Pledge Envelope Tracking" section of this guide.

Submitting Pledge Envelopes

Encourage online pledging when available and keep paper forms available for employees who want to contribute by paper. Pledge forms can also be printed from www.seca.pa.gov.

Appoint contacts within your agency to collect paper pledge forms for their respective offices and place them in a report envelope. (If you do not have report envelopes, contact RA-SECA@pa.gov to request a supply.)

Once completed, report envelopes with pledge forms should be forwarded via interoffice or regular mail (using a traceable mailing method) to:

**Department of Revenue
Bureau of Imaging and Document Management
1854 Brookwood Street
Harrisburg, PA 17104
Attention: Deborah Stoner**

For any questions regarding delivery of report envelopes, please contact Deborah Stoner in the Department of Revenue at 717.787.4112 or via email at destoner@pa.gov.

PLEDGE FORM & ENVELOPE CHECKLIST

Before submitting SECA pledge forms, please ensure the following to prevent errors and delays in processing:

EMPLOYEE & DONATION INFORMATION

- Fields in the "Donor Information" and "Employee Tracking Information" boxes of the form should be completed entirely and legibly.

- Confirm that the employee ID is present and is correct (employee ID is different than social security number). Missing employee IDs will hold up processing for the entire envelope.

- Confirm that the donation amount is in the appropriate box – "payroll deduction" (for both one-time or recurring deductions) or "check/money order."

- If employee is making a payroll deduction, confirm the "# of Paydates Per Year" box is correct. For a recurring deduction, leave this field blank. For a one-time deduction, enter "01" in this field. Any other values entered will be considered a recurring deduction.

- Make sure a charity designation code has been selected. If an employee wishes for their donation to be distributed equally among the umbrellas, enter "0000-0000."

- Confirm that the designated amount for each charity is in the correct field – "amount pledged per pay" or "one-time amount."

- The minimum amount to designate per charity is \$1.

- No more than 10 charities may be designated, and additional forms must be used if more than four charities are designated.

- Make sure the form is signed and dated. Unsigned forms will hold up processing for the entire envelope.

PAYMENT

- PLEASE DO NOT SEND CASH. All cash must be converted to money orders or cashier's checks before submission.

- Agencies should not deposit checks into any commonwealth accounts and issue checks from that account. Depositing or issuing checks into or from commonwealth accounts will result in inappropriate accounting entries being recorded on the commonwealth's financial records.

FUNDRAISERS

- For fundraisers, use first name "FUND" and last name "RAISER." Use employee ID of all nines, "999999999."
- Fundraisers must be designated to "0000-0000." Specific charities cannot be designated for fundraisers.

GENERAL

- Do not hole-punch or staple pledge forms, as this causes errors during form scanning.
- Before sealing the pledge envelope, be sure the information on the outside of the envelope matches what is inside the envelope. The number of donors should match the number of pledge forms in the envelope, and the amount of contributions must match the donation amounts found on the pledge forms inside. In particular, one-time donations inside the envelope (checks or money orders) must match what is written on the outside of the envelope.
- Do not hold onto forms or envelopes for an extended period. Submit forms as you receive them so they can be processed in a timely manner and your fundraising totals will be up-to-date. Holding onto forms also delays the depositing of checks for those donors who write checks.

PLEDGE ENVELOPE TRACKING

To protect contributions, report envelopes are tracked using a report tracking form on the SECA website. Sensitive information and sometimes checks or money orders are contained in report envelopes. Anyone responsible for gathering and forwarding the envelopes is required to document their handling of the envelope by recording it on the SECA website.

To Track Report Envelopes:

1. Access the SECA website at www.seca.pa.gov
2. Click on "Envelope Tracking" on the right side of the main page
3. Enter the appropriate information in each field and click "save"

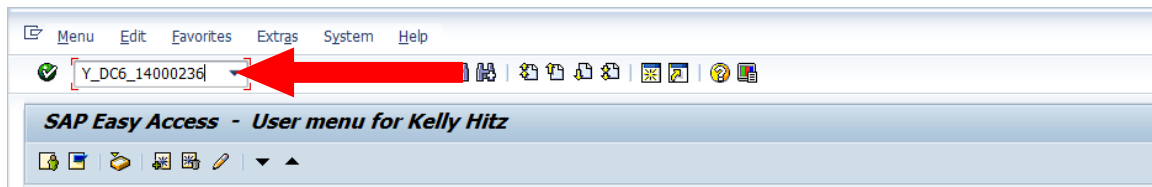
If you make an entry error and save it, email RA-SECA@pa.gov. Include in your email the error made and the correct information.

SAP AGENCY TOTALS REPORT

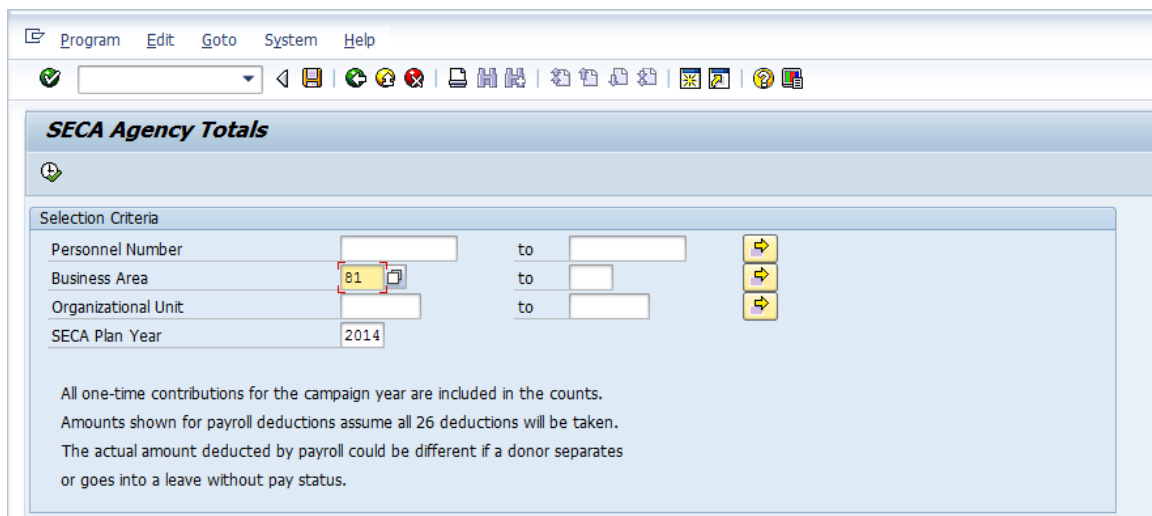
A report is available to agencies who use the commonwealth's payroll system (SAP) to show your agency's fundraising total at any given time. If you are not able to access the report or SAP, please contact your agency's HR office to be assigned the role HR_SECA_AGY_COORD_BA_COPA. Your HR office may also reach out to RA-SECA@pa.gov or the SECA program coordinator to verify the need for access to the report.

To run the report:

1. Open SAP and enter the report transaction number Y_DC6_14000236 into the field at the top.
2. Click the green circle/check mark to the left of the field.



3. On the next screen, enter your business area and the plan year (The plan year is the year *when deductions will actually take place*. For example, for the campaign occurring in 2016, the plan year will be 2017.)

A screenshot of the 'SECA Agency Totals' report selection criteria screen. The interface includes a menu bar with 'Program', 'Edit', 'Goto', 'System', and 'Help'. Below the menu bar, there is a dropdown menu and a toolbar with various icons. The main content area is titled 'SECA Agency Totals' and contains a 'Selection Criteria' section with the following fields:

Personnel Number	<input type="text"/>	to	<input type="text"/>	<input type="button" value="→"/>
Business Area	81	to	<input type="text"/>	<input type="button" value="→"/>
Organizational Unit	<input type="text"/>	to	<input type="text"/>	<input type="button" value="→"/>
SECA Plan Year	2014			

Below the selection criteria, there is a text box containing the following information:

All one-time contributions for the campaign year are included in the counts.
Amounts shown for payroll deductions assume all 26 deductions will be taken.
The actual amount deducted by payroll could be different if a donor separates or goes into a leave without pay status.

- Results will be shown by organization and by payroll deduction or one-time donation. Fundraisers show as one-time donations. It will always show employee count of "1" for fundraiser, even if you do multiple fundraisers.

Add the total payroll deductions to the total one-time donations for your grand total.

SECA Agency Totals

Program: ZH_REPT_SECA_AGENCY_TOTALS Commonwealth of Pennsylvania Page: 1
 User : P00696163 Human Resources Planning Date: 06/03/2013
 SECA Agency Totals for 2013 Time: 13:30:46

BA	Bus Area Descr	Org Unit	Org Descr	Pay Deduction		One-Time Donation	
				EE Count	Total	EE Count	Total
10	Aging						
		00100100	AN Off of the Sec	3	884.00		
		00101201	AN Off of Chf Cnsl	1	702.00		
		00102001	AN Off of Cmty Svcs and Advcy	2	607.88	1	217.00
		00102401	AN Bur for Advcy Pro and Ed	1	286.00		
		00102411	AN Ombdsmn Div	1	299.00		
		00102413	AN Hlthy Agng Ed and Outrch Div	2	780.00		
		00103111	AN Hr Div	1	52.00		
		00103601	AN Press Off	2	650.00	1	100.00
		00104113	AN Rsch Eval Div			1	50.00
		00105016	AN Metrics Analytics Div	1	130.00		
		00105211	AN Lnsng Div	1	130.00		
		00105313	AN Integrated Cre Div	1	52.00		
		9999	Fundraiser			1	665.00
	Total			16	4,572.88	4	1,032.00

CAMPAIGN ADMINISTRATION

Campaign Coordination

The SECA campaign is managed by the Office of Administration, Bureau of Employee Benefits and Services, under the leadership of the Secretary of Administration. SECA's contact information is:

PA Office of Administration
Bureau of Employee Benefits and Services
State Employee Combined Appeal
613 Finance Building, Room 205
Harrisburg PA 17120-0400
Phone: 717.705.5695
Email: RA-SECA@pa.gov

Annual Campaign Chair & Co-Chair

Each year, a cabinet-level official chairs the SECA campaign with the support of a co-chair. Together, these campaign leaders help to garner support from fellow agency leadership and provide direction for the campaign. The following year, the co-chair will move into the chair position.

Governance

SECA is governed by [Management Directive 530.23 Amended and Manual 530.21](#).

Administrative Fee

As is common in most campaigns, a minimal administrative fee is assessed from SECA donations to cover costs such as printing and processing of donations. SECA strives to keep costs as low as possible and in recent years the administrative fee has decreased significantly. In the 2018 campaign, the fee will be 6.25%.

Many of the charities that participate in the SECA campaign have small or no budgets for marketing and growth of their donor base. The fee assessed by SECA also helps us to market on their behalf in order to give them an opportunity to reach potential new donors among commonwealth employees.

Distribution of Donations

Employees pledge their donations during the campaign that takes place in the fall of each year. Payroll deductions then begin with the first payroll of the following year.

Once payroll deductions begin, funds are delivered electronically to the appropriate umbrella organization, along with a corresponding donor report, each month. The umbrella organization then passes the funds and donor information on to the designated charity.

Umbrella organizations are not permitted to take an administrative fee and act only as a pass-through with respect to funds.

CAMPAIGN CHECKLIST

To help you keep tabs on your campaign efforts, here is a checklist to work from.

	Pull together a team to develop a campaign plan.
	<p>Set your dates.</p> <ul style="list-style-type: none"> - Have senior management sign an endorsement letter - Set date for agency kick-off - Schedule fundraising activities such as a bake sale - Schedule dates, times and locations for group meetings - Set date to send thank-you messages via email, intranet or newsletter
	<p>Start the planning process. Develop a plan that works for your agency.</p> <ul style="list-style-type: none"> - Invite loaned labor leader and umbrella organizations to attend your meetings - Develop agenda for employee meetings - Create and post promotional materials - Solicit, educate, solicit some more
	<p>Follow up</p> <ul style="list-style-type: none"> - Make sure everyone has the opportunity to participate - Politely check in with employees that seemed unsure - Keep up with submitting any report envelopes you get and track them online at www.seca.pa.gov
	<p>Stay informed</p> <ul style="list-style-type: none"> - Check in with your team via recurring meetings - View progress each week on the SECA website
	<p>Always remember to thank everyone who contributed to the success of the campaign.</p> <ul style="list-style-type: none"> - Volunteers (team members) - Donors - Management