BUILD OUR CITY

Combined Municipal Campaign 2014

What is the CMC?

What to Expect as a Coordinator

Ready, Set ... Go!

Get a Head Start on Reporting

Put the Fun in "Fun"draisers

Aim High & Reach Your Goal

Coordinator Training Manual

August 2013

BUILD OUR CITY

Combined Municipal Campaign 2014

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The secret is out – Houston is the coolest city in America.

People from all around want to join the fun, too, and they are in droves. We have already grown by 40,000 new residents since the latest census just three years ago – from 2.1 million to 2.16 million – and we're just getting warmed up. Experts think that by 2020 our population will be up to 2.5 million.

Being cool has its costs, though.

Along with this rising tide of popularity, there is a similar surge in the call for aid. Our outstanding local charities are expanding services, programs, and resources as fast as they can, but at times it seems like they are losing ground.

With your help we can keep up with the increasing need.

I know that our social ills are no match for our collective generosity, and I can tell you that the city of Houston's CMC is the perfect vehicle for your contributions. If each city employee gave just $2 a paycheck, the cost of a fountain drink, we'd raise more than $1 million. For the cost of an iced latte, or $4 a paycheck, we'd raise more than $2 million.

That's money that would go a long way toward feeding the hungry, giving people a place to sleep, helping someone attain new job skills to gain employment, giving aid to families in need and making Houston an even better place to live.

There is something every bit as valuable as your financial contributions; that is your time and energy. The local charities the CMC supports can use that too.

Houston is on the move. Let's not leave anyone behind. Let's all lend a hand, give just a little, and take everyone along with us. Let's continue to Build Our City.

Annise D. Parker

What is the CMC?

The Combined Municipal Campaign is the city's annual giving drive by employees to raise money for local charities. The CMC occurs during October each year.

During that time, approved charitable organizations, funds and federations may participate in fund raising activities and receive donations or pledges from employees in the form of payroll deductions, checks or money orders.

The CMC consists of 13 federations and more than 700 charities. A federation is an umbrella organization for a group of five or more charities.

Unaffiliated agencies, or local agencies, are 501(c)(3) organizations supported in part by donations from the public. These agencies operate independently and are not associated with a federation.

Combined Municipal Campaign

Working Together Giving Together

A Team Effort!

City employees team up for the 1996 CMC

The city of Houston Combined Municipal Campaign team steps up to the plate in 1996 with a $257,537 earned average and a desire to take it even higher this year.

The team slogan, "Working Together, Giving Together - A Team Effort!" reflects what city employees can accomplish. Working together, employees can reach the 1996 giving goal of $300,000 and lead the city to another outstanding season.

Lonnie Vara, director of the Personnel Department is responsible for the campaign again this year. Citywide coordinators are Cynthia Sax and Rebecca Becerra.

"Getting our department teams ready included plenty of preseason activity," Vara said. The Mayor's Executive Breakfast kicked off the campaign. Department directors and City Council members were given a campaign overview and all the stats they needed for their team to win in 1996.

Department directors drafted coaches and team leaders to run the campaign in their departments. These employees attended the Coordinator Training Day and Agency Fair, August 22, at the George R. Brown Convention Center.

At the training, coaches and team leaders learned more about the campaign, their department goals, and what it takes to lead their team to a winning season.

The official campaign season begins in September, and department coaches are counting on their teams to win. So, players get ready. Support your team this season and reap great rewards for yourself and your community.

Hall of Famer Calvin Murphy gives department coordinators a lot of encouragement for the CMC season.

1996 CMC CAMPAIGN

Department coordinators attended training classes like this one to learn more about the Combined Municipal Campaign and the participating charities.

Inside :

What's new — 2

Your dollars at work — 3

Challenges & goals — 4

A bit of history

1991 — Mayor Kathy Whitmire creates the CMC with AP 2-16.

1995 — HR takes over as permanent chair of CMC.

1997 — $452,000 raised - a new record.

2004 — $647,000 raised - a new record.

2006 — Moved start of deduction cycle to January.

2007 — No more scantrons! Online pledging goes live.

2008 — Donations top $1 million..

2010 — All-time record set at $1.4 million.

2013 — All-time participation record - 67%.

CMC timeline

Although the fundraising activities only occur during October, the CMC is a year-round operation.

- **JAN** CMC Recognition
- **MARCH** First quarterly report sent to agencies
- **APRIL - JULY** Receive & Review Agency Applications
- **AUG** Coordinator Training; Campaign Invites Sent Out
- **SEPT** Executive Luncheon; Agency Fair
- **OCT** CMC Begins; Auction
- **NOV** Reporting
- **DEC** Campaign Results

Calendar

Last Day
to Pledge
October 31
www.houstoncmc.org

AUG 19 **Coordinator Training**
9 a.m. – 3 p.m.
EB Cape Auditorium

SEPT 25 **Agency Fair**
11:00 a.m. – 1:30 p.m.
City Hall – Hermann Square

OCT 1 **Online Sign-Up begins**
www.houstoncmc.org

OCT 7 **Online Auction begins at 8 a.m.**
www.houstoncmc.org

OCT 18 **Online Auction, closes at 1 p.m.**
611 Walker Lobby
item pick-up from 2 p.m. – 5 p.m.

OCT 19 **Barkitecture**
11 a.m. – 1:30 p.m.
GreenStreet
www.barkitecturehouston.com

OCT 31 **Online Sign-Up concludes**
www.houstoncmc.org

NOV 13 **Reconciliation begins**

NOV 20 **Reconciliation ends**

September

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

October

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27 / 30	28	29	30	31		

November

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Your Role

As a CMC coordinator, you are volunteering your time and expertise to help your department reach this year's goals. In turn, this will help the city reach our citywide goals and give back to the community. Coordinators are the foundation of our campaign. Without your assistance, there would be no CMC. For larger departments, try dividing up coordinator duties to help keep one coordinator from getting overwhelmed.

Lead Coordinator Role

The lead coordinator will act as a representative for the department's CMC volunteer committee. Duties include: training and managing volunteers and fundraisers, tracking donations, and ensuring proper documentation of pledges and overall management of the department's campaign. The lead coordinator will work with the director in setting contribution and participation goals for the department.

Treasurer

Treasurer: Duties include: Management of collected donations, management of fundraiser monies, maintenance of Excel reporting form and donation reports, and reconciliation of all funds.

Co-Coordinator Role

The co-coordinator assists the lead coordinator and acts as stand-in if the lead coordinator is unavailable. Duties include: acting as back up for the lead coordinator and assisting with lead coordinator duties.

Secretary

Secretary: Duties include: Scheduling fundraising and agency events on the online CMC event calendar, as well scheduling large-scale events with CMC chair, Nichole Robinson, scheduling agencies for departmental agency fairs and disseminating information about that agency to the department, taking photos at department events, and maintaining department documentation

Tips

Have the director or other executive leadership publicly endorse the campaign by email or other means.

Come up with a creative kick-off. Invite lots of agencies and get senior mananagement to attend and participate

Encourage employees to participate, but always stress that it is a voluntary giving program.

Ask for help if you get overwhelmed.

Ask for volunteers to help run the campaign.

Use fundraising events as team-building opportunites and moral boosters.

Why we do this

Here's a look at what your dollars can do:

$1 per pay period ($24 per year*)	An item on the dollar menu at a fast food restaurant	6 hot meals and companionship for low-income seniors
$4 per pay period ($96 per year*)	A café latte	Help managing their diabetes for one month for 6 people
$5 per pay period ($120 per year*)	A foot-long sandwich	24-hour crisis counseling and referral services for 8 individuals
$10 per pay period ($240 per year*)	Going out for lunch	Provides 30 youth with a safe place to learn and grow after school for one week
$21 per pay period ($504 per year*)	Going out for dinner	Provides 10 families with free tax preparation and access to a matched savings account
$25 per pay period ($600 per year*)	Two tickets to a baseball game	Provides one month of quality early childhood education for 9 children

2013 Results

Department	Participation	Contribution
Administration & Regulatory Affairs	100%	$22,100
Aviation	100%	$150,000
City Council	74%	$4,700
City Secretary	100%	$1,700
Controller's Office	83%	$21,000
Department of Neighborhoods	95%	$3,100
Finance	100%	$13,100
Fire	96%	$175,000
Fleet Management	98%	$6,900
General Services	78%	$16,000
Health and Human Services	87%	$40,700
HEC	100%	$19,500
Housing and Community Development	100%	$14,400
Human Resources	36%	$45,000
Information Technology	60%	$11,000
Legal	83%	$19,300
Library	72%	$43,700
Mayor's Office	47%	$14,800
Municipal Courts	72%	$15,000
Office of Business Opportunity	100%	$2,200
Parks & Recreation	69%	$19,000
Planning & Development	100%	$12,000
Police	27%	$70,200
Public Works & Engineering	95%	$126,000
Solid Waste Management	81%	$30,000
Citywide Totals	**67%**	**$896,000**

Planning Your Campaign

Setting your goals

The executive luncheon is designed to give the lead coordinator one-on-one time with your director.

During this lunch, you'll hear from guest speakers about the importance of the CMC. You will also discuss the goals, fundraisers and overall plans, for your department's campaign.

So take advantage of this time and get off to a great start on a successful CMC.

Goal setting tips

Set goals that are achievable and measurable, yet challenging.

Publicize goals so that employees know what they are aiming for.

Create internal competitions between divisions to see who hits the goals first.

The kick-off

The citywide kick-off is the annual agency fair where employees can talk with a variety of local charities. You are encouraged to have your own departmental kick-off rally.

Kick-off tactics

Leadership support: If at all possible, management should approve time for their employees to attend the kick-off.

Make it Fun: Food is always a draw! Incentives are always appreciated - particularly if it is the boss who is offering a lunch or a prized parking space as part of a participation lottery. (TIP: Tie any lottery into payroll contribution giving (i.e. for each dollar per pay period they have "x" chances to win); this will dramatically increase the overall dollar results of your campaign.)

Stress the importance of the CMC: This is a once-a-year solicitation on behalf of a multitude of charities. If there are coworkers who have been helped by a participating charity, ask them if they will do a testimonial before the group.

Be Positive and Knowledgeable: If you believe in the campaign, then this will show. Encourage questions. If you are unsure of an answer, simply say, "I don't know, but I will find out for you" and then get back to that employee.

Make it interactive: Create games or contests like a scavenger hunt that encourage employees to learn more about the agencies in attendance.

Follow Up: CMC Tributes and donation forms should be available. You want to tap into the enthusiasm the event has generated immediately. If they do not make their pledge at this time, follow up with each within two days of the event. Remember, the #1 reason people do not give is that they are not asked.

Donations

Employees have three options for giving: one-time payroll deduction, 24-pay period deduction, or checks, money orders and cash.

The online form is available on ESS at www.houstontx.gov/ess. We encourage employees to use this method, but for those who need paper forms, every Tribute has one on the back cover.

Incentives for donating

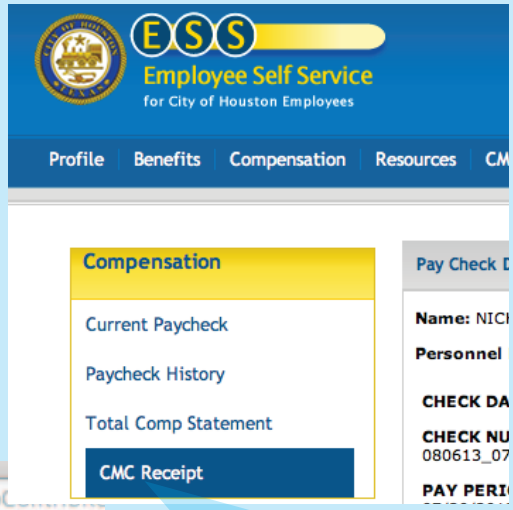
Incentives to stimulate participation and giving are also helpful. One example would be to put every employee donating a minimum of $X per pay period into a lottery and draw for prizes. Or everyone who turns in their pledge on the first day of the campaign, or first 100 forms turned in.

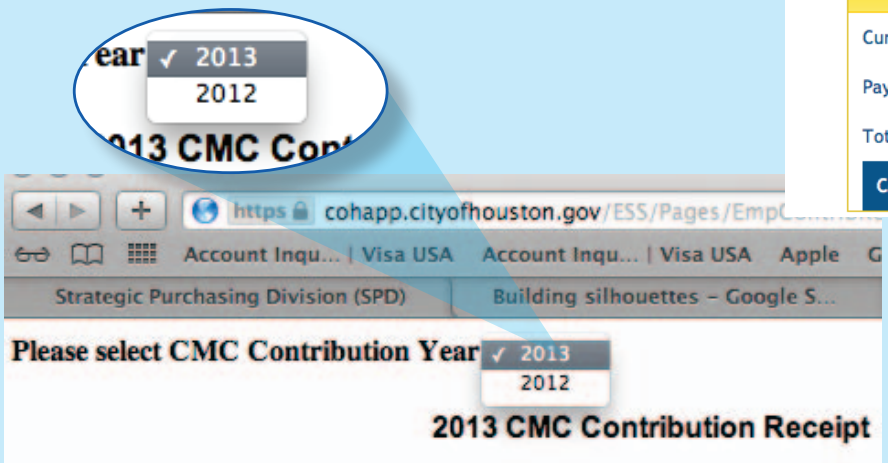
The following are ideas for other no- or low-cost incentives:

- Lunch with the director.
- Services rendered by senior managers - car wash, meal cooked, etc.
- Employees with special skills donate their services - meal cooked and served, oil changed in car, baby-sitting services, artwork produced, etc.
- Mention in newsletter.
- Ask senior management to donate gift cards.
- Recognition breakfast/lunch for leadership givers.
- Opportunity to play tennis or golf with senior management.
- Ask for season ticket holders to offer tickets to sporting events, concerts, plays.
- Ask agencies for door prizes.
- Preferred parking space for a week/month/year.

CMC receipts from previous years

Employees can find their CMC donation reciepts in ESS at www.houstontx.gov/ess. Click on the compensation tab, then CMC reciept menu item on the top left of the screen. Choose "CMC Contribution Year" from the drop down menu. Select the year and the donation reciept will generate.





Fundraisers

Fundraisers are a great way to raise money. Not only do they help meet your department's contribution goal, they can also be a fun way to help our community.

Be creative and have some fun!

Tips for a Successful Fundraiser

To make sure your fundraising event is a big success, you need to have a plan. Here are just a few tips to keep you on track.

Choosing an event: Choose an event that appeals to your audience. Brainstorm a creative and unique fundraising event that will make giving to charity fun.

Volunteers: Consider how many volunteers you'll need before, during and after the event. You don't want to plan an event that will require more volunteers than you have.

Timing and location: Paydays are always a great day for a fundraiser. Make sure you get the appropriate permissions for the location. If it will be held outside, have a rain plan.

Consider the costs: Price your fundraiser to make sure that you get the most out of the event. Attempt to have as much as possible donated. The more you have donated, the more money you can raise for charity. Be patient and don't be afraid to ask for special discounts, deals or treatments.

Choosing an agency: Find an agency linked to your department. Let the department's coordinators vote on the benefiting agency. If your materials were donated, let the donor choose the benefiting agency.

Get the word out: Advertise your event by putting up posters, sending department e-mails, posting flyers in break rooms, and announcing the fundraiser at staff meetings.

Stay organized: Create a checklist of tasks to complete and due dates. Assign volunteers to specific tasks and make a schedule to hand out before the event.

Follow up: Keep a record and chart the progress of your fundraiser. Identify a safe place to store the money you collect. Don't forget to send thank-you letters to donors and to thank all those who helped out.

Group Volunteering

Group volunteering is a great way to BUILD in your department. Look through the list of local independent agencies and think of ways that your department could help out. Group volunteering is an excellent way to learn more about each other and build a sense of team. And volunteering can be counted towards your participation goal.

Group Volunteer Tips

Choosing an activity: Poll your employees to find out what's important to them, what talents or skills they have and tailor your activity accordingly.

Point of contact: Assign one person to be the primary contact and group volunteer coordinator.

Plan ahead: Many agencies have a waiting list. Plan ahead for popular activities like the Houston Food Bank. Or think about finding a smaller agency. Many non-profits also require a waiver or other form to completed by volunteers.

Offer multiple opportunities: Offer several opportunities to maximize engagement. Offering different types of activities at varied times will encourage employees to find an activity that meets their talents and schedule.

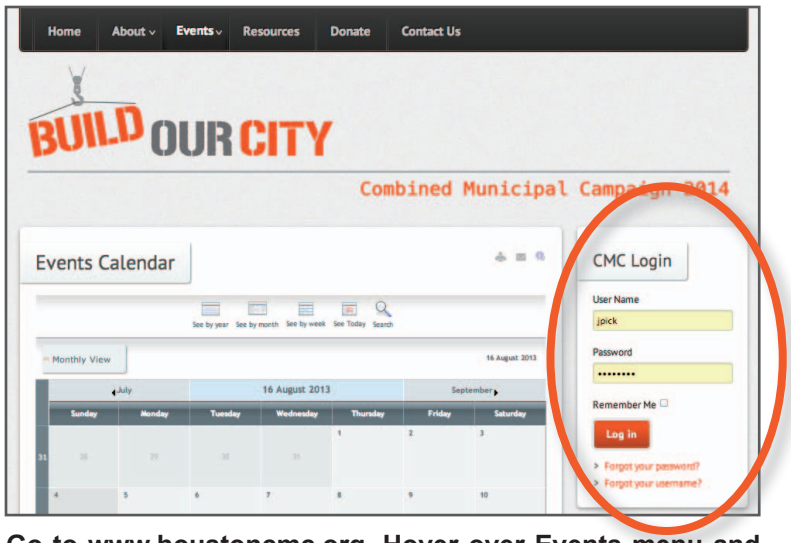
Things to think about: Do you want to allow members of your group to bring family members? Is your group willing to separate at the event or location to engage in a variety of tasks, or do you prefer an activity where you will remain together? Do you want to wear team shirts?

Things to ask the agency: Are there age restrictions? What tools will be provided and what are the volunteers expected to bring? Should the volunteers bring food or drinks? How to dress? What are the exact times and dates volunteers need to be there? Where should volunteers go upon arrival? What about parking?

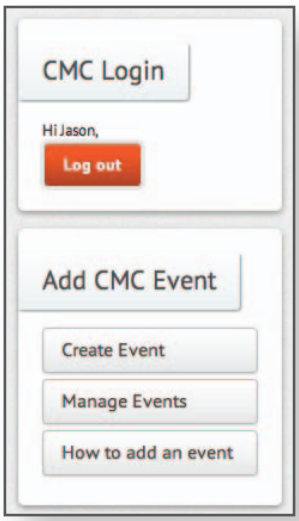
On the day of the group volunteer event: Be on time. Confirm responsibilities and commitments with organizers. And don't forget to take pictures.

After the event: Survey the participants and find out what they liked and learned. Find out what they wish had been different. What do they hope for the next time? Share the results and experiences with others in the department and dare to BUILD!

Add your event online



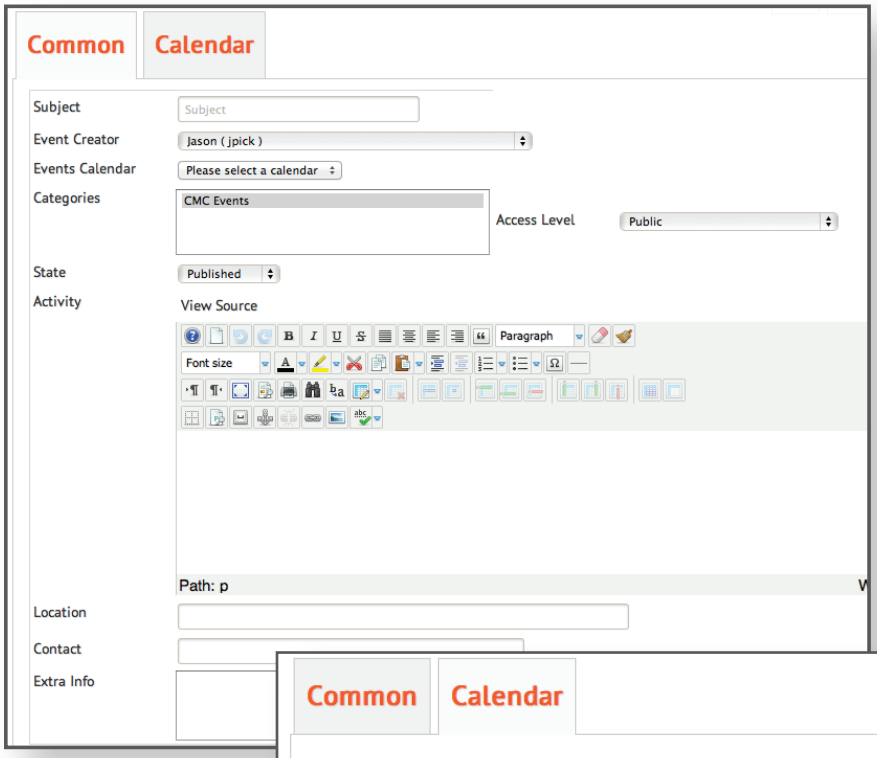
Go to www.houstoncmc.org. Hover over Events menu and click on Events Calendar. Log in.



After you are logged in, you will see this menu.

Use this menu to create or edit an event that you've already created.

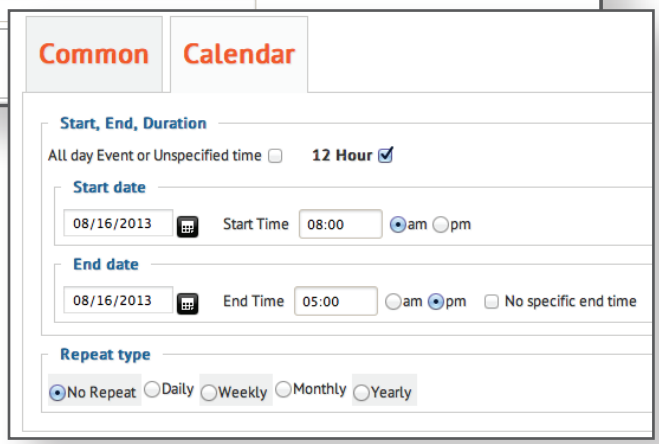
There are also step-by-step instructions.



Change the following on the "Common" tab:

- Subject - name of your event
- Events Calendar - choose CMC Events
- State - change to Published
- Activity - enter event description here
- Location - event location
- Contact - contact name, email and phone

NOTE: For instructions on how to include an image, view the online "How to add an event" tutorial.



Change the following on the "Calendar" tab:

- Start date and time
- End date and time
- Repeat type

Press Save at top right to make your event live

Departmental challenges

As an incentive to departments who raise the bar and work to improve results, four challenge awards are issued. Departments are divided into levels according to size. There will be one winner for each award at each level.

Challenges are:

1. Largest percent increase in participation compared to the previous year.
2. Largest percent increase in contributions compared to the previous year.
3. Highest percent of employees in the Above & Beyond Club.
4. Highest per capita contribution.

Levels

A Departments with 1,001+ employees: HAS, HFD, HHS, HPD, PWE
B Departments with 401 to 1,000 employees: ARA, HPL, PR, SWM,
C Departments with 201-400 employees: FMD, GSD, HEC, HR, IT, MCD
D Departments with 1-200 employees: CNL, CSC, CTR, DON, FIN, HCD, LGL, MYR, OBO, PD

Above & Beyond Club

Membership in the Above & Beyond Club is open to all employees who pledge 1 percent or more of their salary to the CMC. Each member will receive special thank-you letter and certificate from the Mayor, a small gift and recognition in the City Savvy newsletter.

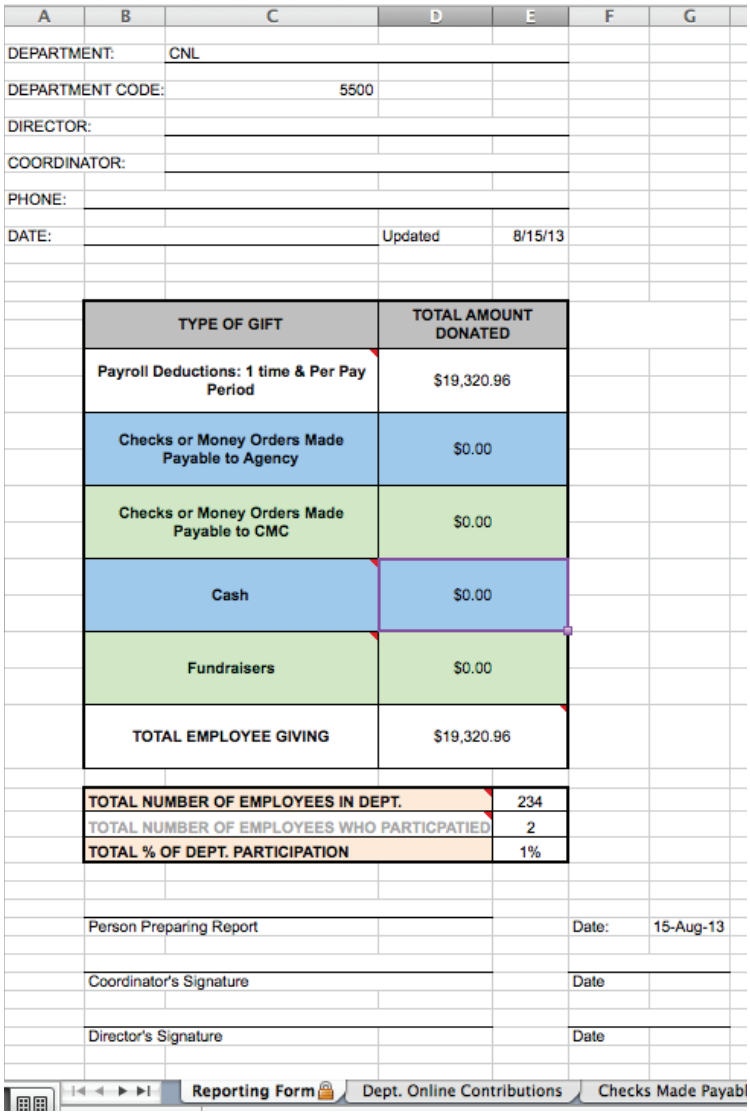
Members who give 2 percent or more will be recognized at a City Council meeting in January 2014.

Departments are encouraged to make a special event out of the presentation gift, such as a breakfast or cake and punch reception.

Reporting

The lead coordinators for each department are responsible for reporting CMC totals for their department. You will be provided with an Excel document with a reporting form that will need to be completed along with reporting worksheets for paper form donations and fundraisers (i.e. cash, checks and money orders.) At the conclusion of the campaign, e-mail the spreadsheet to nichole.robinson@houstontx.gov and print a copy of the reporting form. Bring the completed and signed form to your turn- in appointment along with all original paper forms, checks and money orders.

Reporting form



DEPARTMENT:	CNL
DEPARTMENT CODE:	5500
DIRECTOR:	
COORDINATOR:	
PHONE:	
DATE:	Updated 8/15/13

TYPE OF GIFT	TOTAL AMOUNT DONATED
Payroll Deductions: 1 time & Per Pay Period	$19,320.96
Checks or Money Orders Made Payable to Agency	$0.00
Checks or Money Orders Made Payable to CMC	$0.00
Cash	$0.00
Fundraisers	$0.00
TOTAL EMPLOYEE GIVING	$19,320.96

TOTAL NUMBER OF EMPLOYEES IN DEPT.	234
TOTAL NUMBER OF EMPLOYEES WHO PARTICPATIED	2
TOTAL % OF DEPT. PARTICIPATION	1%

Person Preparing Report — Date: 15-Aug-13

Coordinator's Signature — Date

Director's Signature — Date

Reporting Form | Dept. Online Contributions | Checks Made Payabl

Paper forms

As forms are turned into you, look for these common mistakes to save time later:

- Employee ID does not contain six digits — If an employee has a five-digit ID number, a zero must be placed in front of the ID number.
- Contribution type is not checked off — Without this information, the pledge cannot be processed.
- Agency code does not contain four digits — All agencies have a four-digit code.
- Above & Beyond Club is checked yes, but total amount per paycheck is less than one percent — To be considered an Above & Beyond Club member, the employee must give at least one percent.
- Signature is missing — Employee must sign the form.
- Agency code or amount is illegible — Make sure you can read it.
- Check, or money order is attached to form — Make sure it is securely attached. Do not remove checks or money orders until your turn-in appointment. Cash should be totaled and a money order should be purchased for the total amount.

Divide paper forms into four stacks:

Payroll deductions (per paycheck and one time) - You will keep these for your records
Check or money order made payable to agency - These will be turned in to Nichole Robinson
Check or money order made payable to CMC - These will be turned in to Nichole Robinson
Cash - These will be turned in to Nichole Robinson

Payroll deductions

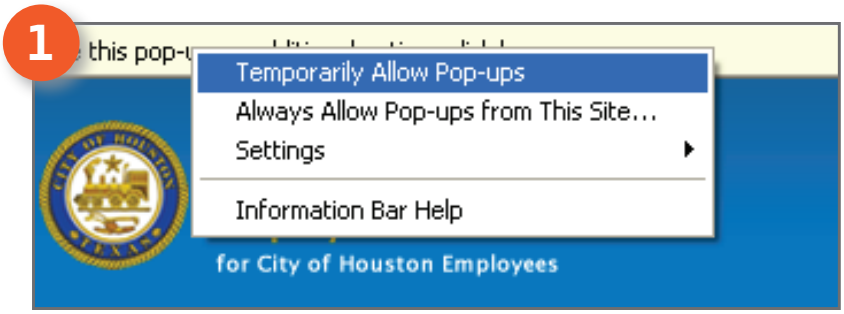
Paper forms for payroll deductions

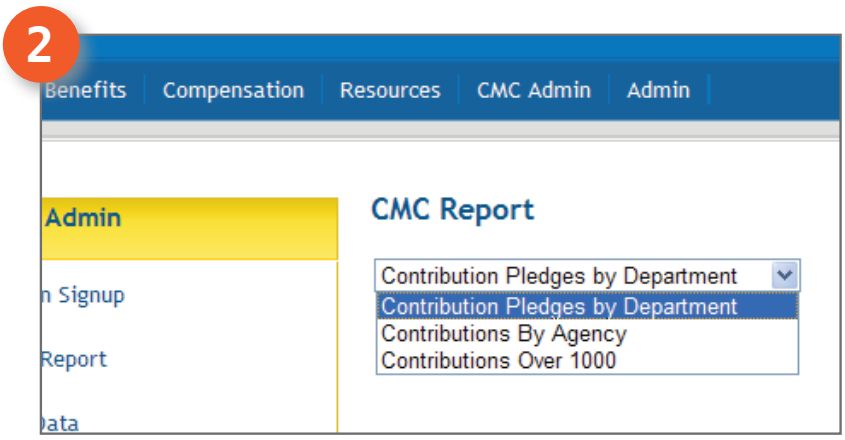
Paper forms for payroll deductions will need to be entered online using the administrator access on ESS, www.houstontx.gov/ess. Only lead coordinators and treasurers for each department will have access. Print a CMC receipt for each form entered. Make a copy of both the paper form and the receipt for each employee for their records. Staple the printout of the receipt to the original paper form.

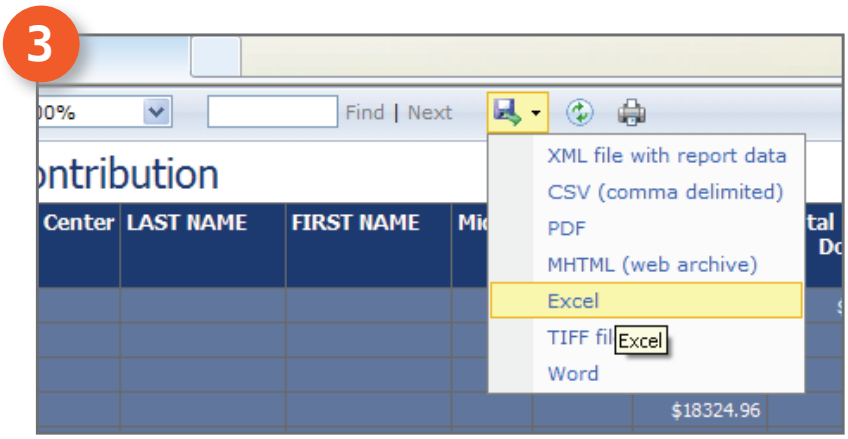
Download the payroll report

After the campaign is over and you have entered in all of your paper payroll deduction forms, you will need to download the CMC report from the ESS website.

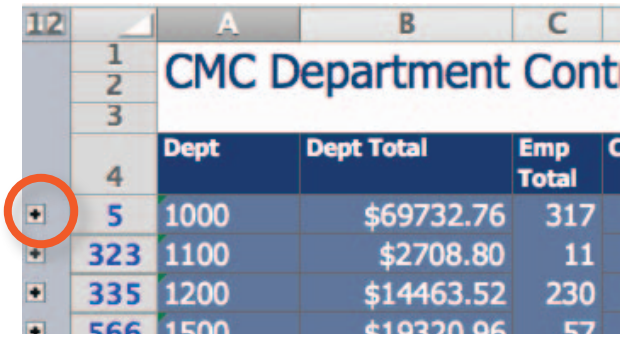
1. Go to www.houstontx.go/ess and log in. MAKE SURE YOUR POP UP BLOCKER IS OFF.
2. Choose "Contribution pledges by department."
3. Select the option to download the department report as an Excel file.

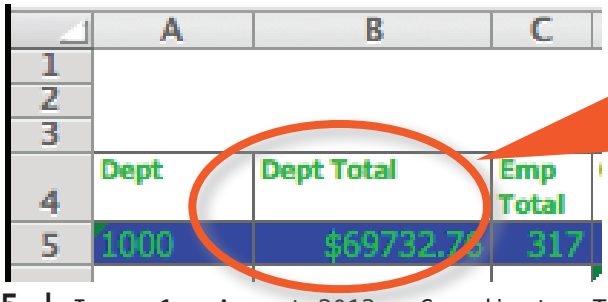






Put payroll info into department spreadsheet





- Open the downloaded report, click the + next to your department number to display your department's payroll form data.
- Select all the cells, copy and paste the donations in the "Dept. Online Contributions" worksheet in your department spreadsheet.

You will need to enter the total from your online pledges into the appropriate cell on the reporting form worksheet.

Checks and money orders

Checks or money orders written out to an agency

- Make copies of the form for the employee and for your records.
- Staple check or money order to original. Alphabetize originals by last name.
- Lead coordinators: Enter donation information for each employee into the worksheet titled “Made Payable to Agency” in your excel spreadsheet.
- Each agency donation will be entered on a separate line, see example below.
- Write the agency code on the memo line of each check.

Made payable to agency worksheet

	A	B	C	D	E	F
1	Employee Information			Donations Made Payable to Agency (checks or money orders)		Total
2	Last Name	First Name	ID#	Agency Code	Amount	Total
3	Doe	Jane	111111	2100	$5.00	$5.00
4	Doe	Jane	111111	2200	$10.00	$10.00
5	Doe	John	222222	2268	$100.00	$100.00
6	Doe	John	222222	2270	$50.00	$50.00
7						$0.00
8						$0.00
9						$0.00
10						$0.00
11						$0.00
12						$0.00
13						$0.00
14						$0.00
15						$0.00
16						
17						$0.00
18						**$165.00**
19						
20						
21						

As you enter your checks or money orders written to an agency, this total will automatically update and populate in the appropriate cell on the reporting form worksheet.

Checks and money orders

Checks or money orders written out to CMC

- Make copies of the form for the employee and for your records.
- Staple check or money order to original. Alphabetize originals by last name.
- Lead coordinators: Enter donation information for each employee into the worksheet titled “Made Payable to CMC” in your excel spreadsheet.
- Each agency donation will be entered on a separate line, see example.

Made payable to CMC worksheet

Microsoft Excel - MASTER Reporting Worksheet

	A	B	C	D	E	F
1	Employee Information			Donations Made Payable to CMC (checks or money orders)		Total
2	Last Name	First Name	ID#	Agency Code	Amount	Total
3	Doe	Jane	000000	2300	$ 25.00	$ 25.00
4	Doe	Jane	000000	2600	$ 50.00	$ 50.00
5	Doe	John	222222	1400		$ -
6						$ -
7						$ -
8						$ -
9						$ -
10						$ -
11						$ -
12						$ -
13						$ -
14						$ -
15						$ -
16						$ -
17						$ -
18						$75.00

As you enter your checks or money orders written to CMC, this total will automatically update and populate in the appropriate cell on the reporting form worksheet.

Cash

- Make copies of the form for the employee and for your records.
- Alphabetize originals.
- Lead coordinators: Enter donation information for each employee into the worksheet titled “Cash” in your excel spreadsheet.
- Each agency donation will be entered on a separate line, see example.
- Obtain a money order(s) for cash total. This must be separate from your fundraiser money orders.

Cash worksheet

Microsoft Excel - MASTER Reporting Worksheet

	A	B	C	D	E	F	G
1	Employee Information			Cash		Total	
2	Last Name	First Name	ID#	Agency Code	Amount	Total	
3	Pitt	Brad	000000	2400	$ 2.00	$ 2.00	
4	Pitt	Brad	000000	1900	$ 5.00	$ 5.00	
5	Pitt	Brad	000000	2201	$ 1.00	$ 1.00	
6	Pitt	Brad	000000	2402	$ 4.00	$ 4.00	
7	Pitt	Brad	000000	2476	$ 6.00	$ 6.00	
8	Pitt	Brad	000000	2478	$ 3.00	$ 3.00	
9	Pitt	Brad	000000	2479	$ 8.00	$ 8.00	
10	Pitt	Brad	000000	2445	$ 2.00	$ 2.00	
11	Pitt	Brad	000000	2460	$ 1.00	$ 1.00	
12						$ -	
13						$ -	
14						$ -	
15						$ -	
16						$ -	
17						$32.00	
18							

As you enter your cash donations, this total will automatically update and populate in the appropriate cell on the reporting form worksheet.

Fundraisers

Use this worksheet to keep track of all department fundraisers.

- Enter all fundraiser names and dates.
- Enter benefiting agency and indicate whether the money order for the fundraiser is made out the agency or CMC.
- Enter totals for money raised and employee participation count.

Fundraisers worksheet

	A	B	C	D	E	F	G
1	FUNDRAISERS						
2	Fundraiser Name	Date	Agency Code	Agency Name	Employee Count	TOTAL	Made Payable to:
3	Bake sale	10/3/13	1234	Workshop Houston		$234.00	Agency
4						$0.00	
5						$0.00	
6						$0.00	
7						$0.00	
8						$0.00	
9						$0.00	
10						$0.00	
11						$0.00	
12						$0.00	
13						$0.00	
14						$0.00	
15						$0.00	
16						$0.00	
17						$0.00	
18						$0.00	
19						$0.00	
20						$0.00	
21						$0.00	
22					TOTAL	$234.00	

As you enter your fundraisers, this total will automatically update and populate in the appropriate cell on the reporting form worksheet.

Participation

Use this worksheet to keep track of participation in the department. Mark a "1" for each employee who donates, volunteers, or participates in a fundraiser.

Participation worksheet

D11 fx

	A	B	C	D
1	PARTICIPATION FROM DEPARTMENT			
2	Total Number in Department			234
3	Last Name	First Name	ID#	Mark the Number 1 for Participation
4	Employee Last Name	Employee First Name	Employee ID	1
5	Employee Last Name	Employee First Name	Employee ID	1
6				
7			in CMC	2

As you enter particpation, this total will automatically update and populate in the appropriate cell on the reporting form worksheet.

Turn in schedule

	Nov. 13	Nov. 14	Nov. 15	Nov. 17	Nov. 18	Nov. 19	Nov. 20
10am	Open	OBO	MYR	LGL	HHS	FMD	HAS
11am	Open	FIN	CCN	IT	HPL	ARA	PWE
2pm	Open	CTR	PD	DON	MCD	PRD	HFD
3pm	CSC	HR	HCD	GSD	HEC	SWM	HPD

Turn in check list

YES	NO	
		Have all paper forms for payroll deduction been entered online?
		Have all paper forms for checks, money orders or cash been entered into the Excel spreadsheet?
		Have all paper forms been separated into four stacks: payroll, cash, made payable to agency and made payable to CMC?
		Are forms in each stack alphabetized by last name?
		Have you made copies of each paper form for the employee and for your records?
		Are checks and money orders still attached to forms?
		Do all checks and money orders made payable to agency have the agency code written in the memo line?
		Have you totaled cash donations and purchased a money order made payable to CMC?
		Have you totaled fundraiser cash and purchased money orders made payable to each benefitting agency?
		Is your completed reporting form printed, dated and signed by your director?
		Have you e-mailed your completed spreadsheet to Nichole Robinson?

If you answered yes to all of these questions then you are ready for your appointment to turn in all CMC monies! If you answered no to any of the questions, then go back through your paperwork and make sure you are ready before coming to your appointment.

Resources

On the CMC website you will be able to download all the resources you will need to help with this year's campaign. Available to CMC coordinators are various forms, campaign logos, contact lists and much more. All this information is found on the resources page on www.houstoncmc.org.

Auction do's and don'ts

For two weeks starting the second Monday in October the CMC campaign holds its annual auction fundraiser. Here are a few do's and don'ts to help you while collecting items for your department.

- ✔ **Do** attach a form for each item and make sure the form is filled out correctly.
- ✔ **Do** try and bring in all the items collected from your department in at one time.
- ✔ **Do** bring new or gently used items only. Unacceptable items will be returned.
- ✔ **Do** make arrangements to meet the buyer if you are auctioning a large item.
- ✘ **Don't** bring in more than 50 items per donation.
- ✘ **Don't** donate an item with an expiration date before October 31, 2013.

FAQs

Q: How do employees sign up to contribute to the CMC?

A: *Sign up is easy. Just visit www.houstontx.gov/ess, log on to your ESS account and choose CMC from the menu on the left of the screen. There will also be paper forms available for employees without computer access.*

Q: What about employees without computer access?

A: *The online form can be accessed from any computer with an internet connection by going to www.houstontx.gov/ess. Paper forms are printed on the back cover of every Tribute. Paper forms should be returned to department coordinators. Coordinators are responsible for entering employee information into the online administrator form.*

Q: Where can I get a paper form?

A: *Every employee should get a copy of the CMC Tribute. The back cover is the paper form. It is perforated to be easily removed from the booklet.*

Q: How can employees learn more information about specific agencies?

A: *Contact information for all local agencies and federations as well as Web site links for all charities in the campaign can be found at www.houstoncmc.org.*

Q: Can we accept cash and checks?

A: *Yes, lead coordinators must purchase money orders with any cash collected from employee donations or fundraisers. We recommend that each department choose an agency or two to support with cash donations. This will make reconciliation easier than if every employee that donates $1 chooses a different agency.*

Q: How do we handle employees that are in one department, but paid by another department?

A: Once the employee's contribution is entered, e-mail Nichole Robinson with the employees name, employee ID# and then a brief explanation of which department he/she works for and which he/she is paid by and Nichole will make sure the correct department gets credit for the contribution.

Q: What months will the deductions occur for this campaign?

A: The deductions will be taken out January - December 2013. They will only come out of the regular 24 paychecks, not the 2 "extra" checks.

Q: When will the contributions come out of my paycheck if I donate one-time vs. 24 deductions?

A: If you are contributing one time your donation will come out of the first paycheck in 2013. If you are donating per payroll your donations will start with the first paycheck in 2013 and continue through December.

CITY OF HOUSTON

Administrative Procedure

Subject: **Combined Municipal Campaign**	A.P. No: **2-16 Revised**
	Effective Date: **July 2, 2013**

1. AUTHORITY

1.1 Article VI, Section 7a, of the City Charter of the City of Houston.

2. PURPOSE

2.1 To establish a policy for City of Houston employees that allows them the ability to make charitable contributions; to establish the Combined Municipal Campaign (CMC) for the solicitation of charitable contributions from City employees; and to establish the designated administrators of the Combined Municipal Campaign.

3. OBJECTIVES

3.1 To provide and implement a clearly defined policy and procedure for soliciting charitable donations from City employees as it relates to the CMC.

3.2 To establish required criteria charitable organizations must meet to receive contributions from City employees.

3.3 To allow City employees, who wish it, an avenue to express their generosity by choosing one or more specific charitable organizations for their donations.

3.4 To enable the annual solicitation of charitable contributions from City employees so as to promote efficiency, minimize disruption in the workplace, and allow deductions in an administratively convenient manner.

4. SCOPE

4.1 This directive is applicable to all City employees, departments and offices.

5. DEFINITIONS

Combined Municipal Campaign - The annual fund-raising solicitation of City employees conducted on behalf of charitable organizations meeting the City's eligibility requirements. The CMC will occur during October of each year. During that time, approved charitable organizations, funds and federations may engage in fund-raising activities on City premises and receive financial pledges which may be paid through 24 pay-period payroll deductions, through one-time contributions in the form of a payroll deduction, or by check or money order.

Approved:	Date Approved:	Page 1 of 5
Annise D. Parker	07/02/2013	

Administrative Fee - A 4% fee to administer the Citywide CMC program for the purpose of defraying related expenses including, but not exclusive to, pledge forms, printing materials, the CMC Recognition Reception, etc. The fee will be deducted from money donated to the charitable organizations. Notification of this fee shall appear on each employee donation form, whether paper or electronic.

Applicant - An organization, fund or federation applying to participate in the Combined Municipal Campaign.

Campaign Beneficiary - An organization, fund or federation that is the recipient of campaign contributions.

Campaign Coordinator - A City employee, designated by HR, who manages and coordinates Combined Municipal Campaign activities.

Charitable Organization - Any entity described in internal revenue code section 501 (c) (3) (26 USC & 501 [c] [3]) and exempt from federal income tax under internal revenue code section 501(a) (26 USC & 501 [a]) and supported in part by voluntary contributions from the public and which, unless exempt, is registered with the Attorney General of Texas or the Texas Secretary of State as a charitable corporation or nonprofit organization.

Charitable Organization Fund - An organization, to which tax deductible charitable contributions may be made pursuant to section 170 (c) of the Internal Revenue Code, which solicits and distributes charitable contributions on behalf of other charitable organizations.

Combined Municipal Campaign Pledge Form - An Electronic or paper form approved by HR for City employees to authorize campaign payroll deductions or one-time pledges.

Department Coordinator - An employee, designated by each department director, who is responsible for conducting the campaign within the department.

Federation of Charitable Organizations (Federation) - An organization which may receive tax deductible charitable contributions pursuant to section 170 (c) of the Internal Revenue Code, and which consists of five or more charitable organizations that solicit and distribute contributions on behalf of its member or recipient organizations. A federation shall endorse the program objectives of its member or recipient organizations and shall ensure that these organizations comply with all state, federal and CMC regulations governing solicitation of campaign contributions.

6. RESPONSIBILITIES

6.1 The Mayor or designee may notify City employees of the annual campaign, express support for the campaign, speak at the Mayor's Executive Luncheon and the CMC Recognition Reception, make an appearance at the Citywide CMC agency fair and promote the campaign whenever feasible.

6.2 HR ensures Citywide compliance with this administrative procedure; approves the criteria to determine applicant eligibility; authorizes the campaign budget; establishes guidelines; ensures that all donating employees have been aware of the existence, amount and purpose of the administrative fee; approves all printed materials for the campaign; encourages department directors to support the campaign; and establishes guidelines for distributing contributions to campaign beneficiaries.

6.3 The Campaign Coordinator provides guidance to the department coordinators; prepares and submits the campaign budget to the HR; determines the eligibility of all applicants

requesting participation in the campaign; organizes the campaign; recommends the campaign financial goal, campaign logo, slogan, brochure, posters, pledge cards and all other printed materials for campaign use; plans all Citywide events; and prepares the final Citywide campaign report.

6.4 The Department Coordinator conducts the campaign within his/her department; attends the working lunch, executive lunch and coordinator training; leads any department sub-coordinators; enters all paper payroll deduction pledge forms received in the department into the online system; and ensures proper documentation and accounting of all pledges and contributions by department employees.

6.5 The Administration & Regulatory Affairs (ARA) Payroll Services Division, in coordination with the Controller's Office, deducts the proper amount from employee checks, ensures proper accounting and record keeping of all payroll deductions, coordinates the distribution of contributions to campaign beneficiaries, deducts the applicable administrative fee from all employee pledges and prepares and processes contributions to campaign beneficiaries.

6.6 The Risk Management Finance Division of the Human Resources Department prepares quarterly reports and initiates and processes an expense off-set with the administrative fees for each quarter. A budget status report will be prepared and submitted to the Campaign Chair.

6.7 Department directors shall allot time for and encourage support of and participation in the campaign among their employees and select one or more department campaign coordinators and authorize department expenditures as necessary to support the program.

6.8 The applicant completes and submits, within the deadline, all documentation requested by the City.

6.9 The City employee may enroll online or sign and submit a CMC pledge form to his/her department campaign coordinator if he/she chooses to donate.

7. REQUIREMENTS

7.1 Applicants who wish to participate in the campaign must:

7.1.1 Be qualified to do business in Texas;

7.1.2 Submit the names of agents who will be representing them before the City;

7.1.3 Assume responsibility for the actions and soliciting behavior of its agents to ensure City employees are solicited in accordance with this procedure; making certain that the work environment of the employee and supervisor is not disturbed and City employees are not harassed;

7.1.4 Be a nonprofit, tax-exempt, charitable federation, fund, or organization supported in part by voluntary contributions from the general public, and providing charitable services;

7.1.5 Retain its status as a 501 (c) (3) and 26 USC 170 tax-exempt entity pursuant to the Internal Revenue Code and the applicable laws of Texas for the period in which funds are being requested;

7.1.6 Certify that it accounts for its funds on an accrual basis (cash, modified cash, modified accrual and any other methods of accounting are not acceptable) in accordance with generally accepted accounting principles and that an audit of its fiscal operations is completed annually by an independent certified public accountant in accordance with generally accepted auditing standards if gross receipts reported to the IRS in the preceding year exceeded $100,000. A copy of the organization's most recent annual audited financial statements must be included with the application. The audited financial statements must cover the fiscal period ending not more than 18 months prior to the January of the year of the campaign for which the organization is applying. For example, the audited financial statements included in the 2013 application must cover the fiscal period ending on or after June 30, 2011.;

7.1.7 Comply with all laws and regulations regarding nondiscrimination and equal employment opportunity with respect to its clients, officers, employees and volunteers;

7.1.8 Ensure that its promotional activities and printed materials are based upon actual program operations and are truthful, nondeceptive, and include all material facts relative to its cause;

7.1.9 Verify that its publicity and promotional activities protect against unauthorized use of its contributor lists, and do not permit the payment of commissions, kickbacks, finder's fees, percentages, bonuses, or overrides for fundraising and solicitation of the public; and

8. PROCEDURES

8.1 Federations, funds, and organizations seeking participation in the CMC shall apply by filing an application with the Campaign Chair on or before May 1st every three (3) years. Contact information and administrative percentages must be updated every year for continued inclusion in the CMC.

8.2 The application must include the following information:

8.2.1 The organization's official name, headquarters or local address, telephone number, and contact person;

8.2.2 The organization's purpose or mission statement;

8.2.3 List of the federation or fund members or constituent organizations;

8.2.4 Description of the services provided by the organization;

8.2.5 Copy of the written policy of nondiscrimination;

8.2.6 Copy of the most current annual report, if available;

8.2.7 Copy of the most current financial audit;

8.2.8 Evidence of nonprofit, tax-exempt status, eligibility for charitable contributions under the provisions of the Internal Revenue Code, and licensed to do business in Texas; and

8.2.9 Authorization to the City allowing for the deduction of the applicable administrative fee.

8.3 Applicants will receive a written notice from the Campaign Chair announcing the status of their application by June 1st.

8.4 Applicants who are not selected as campaign beneficiaries may appeal to HR by requesting a hearing within 10 calendar days of receiving the denial notification. The applicant may submit new information and supporting documentation when making the hearing request. The request must be written and hand delivered to the office of HR.

8.4.1 Reasons for an applicant to not be selected can include an incomplete application package; a business model that includes administrative fees greater than 25%; a human health and welfare organization providing services, benefits, or assistance to, or conducting activities affecting, human health and welfare.

8.5 HR shall hold an appeal hearing within 15 calendar days of receipt of the written request.

8.6 After rendering a determination on the appeal, HR will notify the campaign beneficiary and Campaign Chair.

8.7 Payroll deductions will begin the first pay period each January and will continue twice monthly for 24 pay periods unless the employee selected a one-time payroll deduction.

8.8 Employees desiring to discontinue contributions by payroll deduction may do so by completing the appropriate form available through their department payroll representative. The department coordinator must ensure that the proper payroll transaction form is prepared and forwarded to ARA Payroll Services.

8.9 Preventing coercive activity:

True voluntary giving is fundamental to municipal fundraising activities. Actions that do not allow free choices or create the appearance employees do not have a free choice to give or not to give are prohibited. Activities contrary to the non-coercive intent of the CMC include, but are not limited to:

8.9.1 Solicitation of employees by their supervisor or by any individual in their supervisory chain of command. This does not prohibit the department director from performing the usual activities associated with the campaign kick-off and to demonstrate his/her support of the CMC in employee newsletters or other routine communications with employees.

8.9.2 Supervisory inquiries about whether an employee chose to participate or not to participate or the amount of an employee's donation. Supervisors may be given nothing more than summary information about the major units that they supervise.

8.9.3 Setting of 100 percent participation goals.

8.9.4 Developing and using lists of non-contributors.

8.9.5 Using as a factor in a supervisor's performance appraisal the results of the solicitation in the supervisor's unit or organization.

Coordinators

DEPARTMENT	COORDINATOR NAME	PHONE
Administration and Regulatory Affairs	Lance Licciardi - Coordinator	(713) 837-9617
Aviation	Betti Tywater - Coordinator	(281) 233-1317
	Melissa Saxton - Treasurer	(713) 847-4204
	Chuck Farina	(713) 847-4225
	Shawn Chittum	(713) 847-4211
City Council	Dylan Osborne - Coordinator	(832) 393-0782
City Secretary	Carrie Roberts - Coordinator	(832) 393-1104
Controller's Office	Chanelle Clark - 122954	(832) 393-3408
	Sandra Zeno - 093846	(832) 393-3443
Department of Neighborhoods	Landon Taylor - Coordinator	(832) 393-0857
	Nikki Maddox - Co-coordinator	(832) 393-1038
	Conya Barreras - Secretary	(832) 394-0654
	Valerie Berry - Treasurer	(832) 394-0616
Finance	Stephanie Bell-Williams - Coordinator	(832) 393-9036
	Nickea Bradley - Co-coordinator	(832) 393-9015
	Kerrie Pierce - Secretary	832-393-9123
	Marie Stephens - Treasurer	(832) 393-9020
Fire	Wanda Andrews - Coordinator	832.394.6608
Fleet Management	Jedediah Greenfield - Coordinator	(832) 393-6910
	Keysha Grayson - Co-coordinator	(832) 393-6902
General Services	Ja'nice Sparks - Coordinator	(832) 393-8030
	LaConnie Mitchell - Co-Coordinator	(832) 393-8041
	Bianca Paul - Treasurer	(832) 393-8091
Health	Shenette Seals-Vincent - Coordinator	(832) 393-5056
	Magdalena Soto - Co-Coordinator	(832) 393-4825

Coordinators

DEPARTMENT	COORDINATOR NAME	PHONE
HEC	Helen Woods - Coordinator	(713) 884-3633
	Pam Wafer - Co-Coordinator	(713) 884-3900
	Stacey Prevost - Secretary	713) 884-3616
	Sara Jermany - Treasurer	(713) 884-3618
Housing	Roxanne Lawson - Coordinator	(713) 868-8305
	Yolanda Jeffries - Co-coordinator	(713) 868-8481
	Bridgett Arredondo - Secretary	(713) 868-8394
	Ruperto Castillo - Treasurer	(713) 868-8370
Human Resources	Betty Davis - Co-coordinator	(832)-393-6137
	Carla Coleman - Treasurer	(832)-393-6141
	Yvonne Melendez - Secretary	(832)-393-6049
Information Technology	Leticia Juarez - Coordinator	(832) 393-0082
	Karla Sanchez-Vilchez - Co-coordinator	(713) 884-3702
	Brittany Lockett - Secretary	(832) 393-0081
	Linda Shelton - Treasurer	(832) 393-0119
Legal	Roosevelt Wright - Coordinator	832-393-6327
Library	Belinda Cox - Coordinator	832-393-1682
Mayor's Office	Veronica Mosley - Coordinator	(832) 393-1053
	Onecca Porter - Co-coordinator	(832) 393-1083
Municipal Courts Department	Nydia Vega Trevino - Coordinator	(713) 247-4560
	Eric Piper - Co-coordinator	(713) 247-5947
	Toni Garcia - Secretary	(713) 247-5464
	Antonio “Tony” Diaz - Treasurer	(713)-247-5410
Office of Business Opportunity	LaTanja Bolden - Coordinator	(832) 393-0635

Coordinators

DEPARTMENT	COORDINATOR NAME	PHONE
Parks & Recreation	Marilu De La Fuente - Coordinator	(832) 395-7029
	Briana Rocha - Co-Coordinator	(832) 395-7059
	Erika Reyna - Treasurer	(832)-395-7061
Planning and Development	Stefani Farris - Coordinator/Sec.	(713) 837-7859
	Brian Crimmins - Co-Coordinator	(713) 837-7833
	Alejandra Garcia - Treasurer	(713) 837-7990
Police	Tanika Tucker - Coordinator	713-308-1228
	Jeannette Payne - Co-Coordinator	713-308-1277
Public Works & Engineering	Rochelle Bennett - Coordinator	(832) 395-2452
	Jade Hines - Co-Coordinator	(832) 395-2457
Solid Waste Management	Tracy Jones - Coordinator	(713) 837-9148
	Tisha Fowler - Co-coordinator	(713) 837-9282
	Brian Crimmins - Co-Coordinator	(713) 837-7833
	Alejandra Garcia - Treasurer	(713) 837-7990
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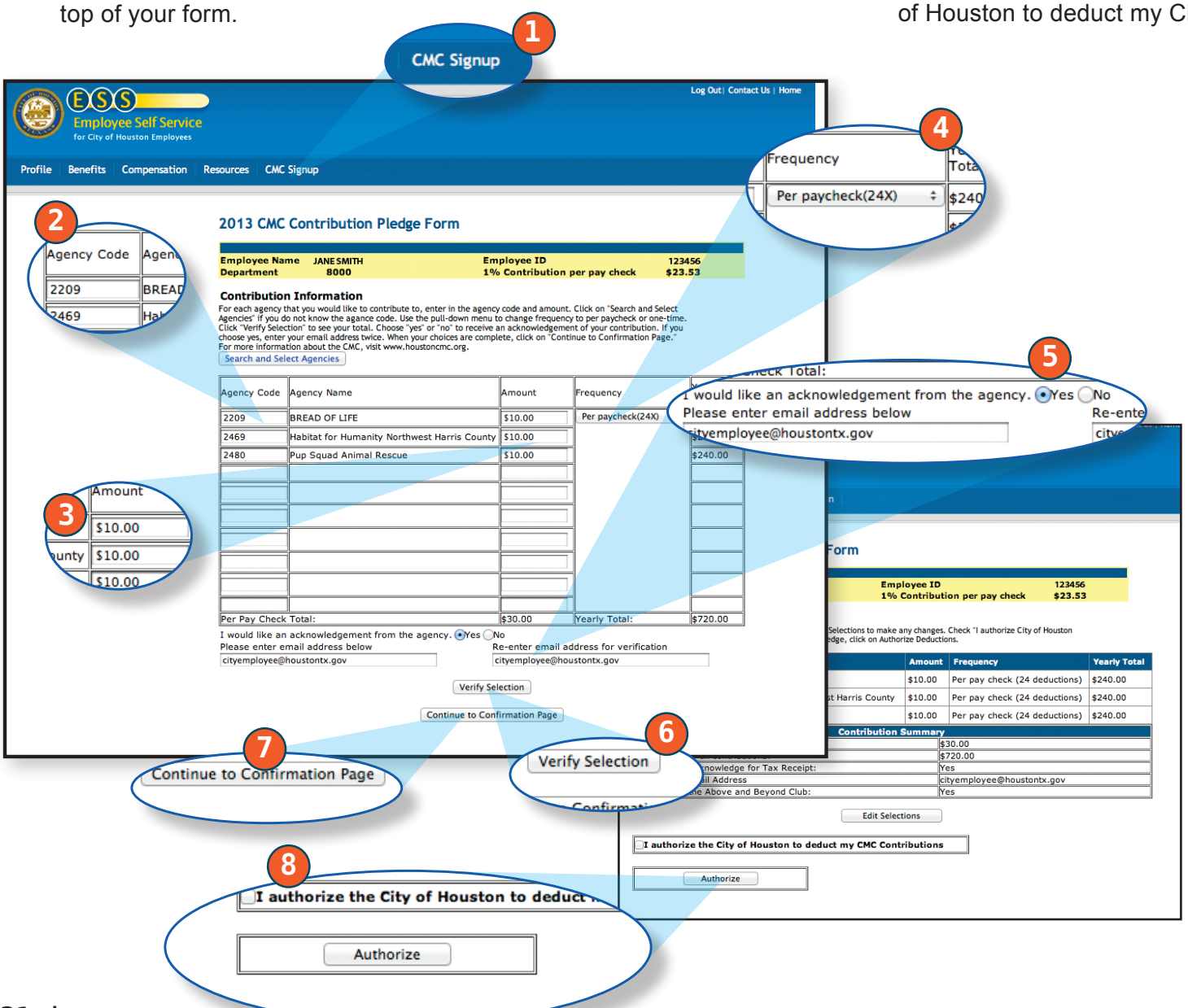
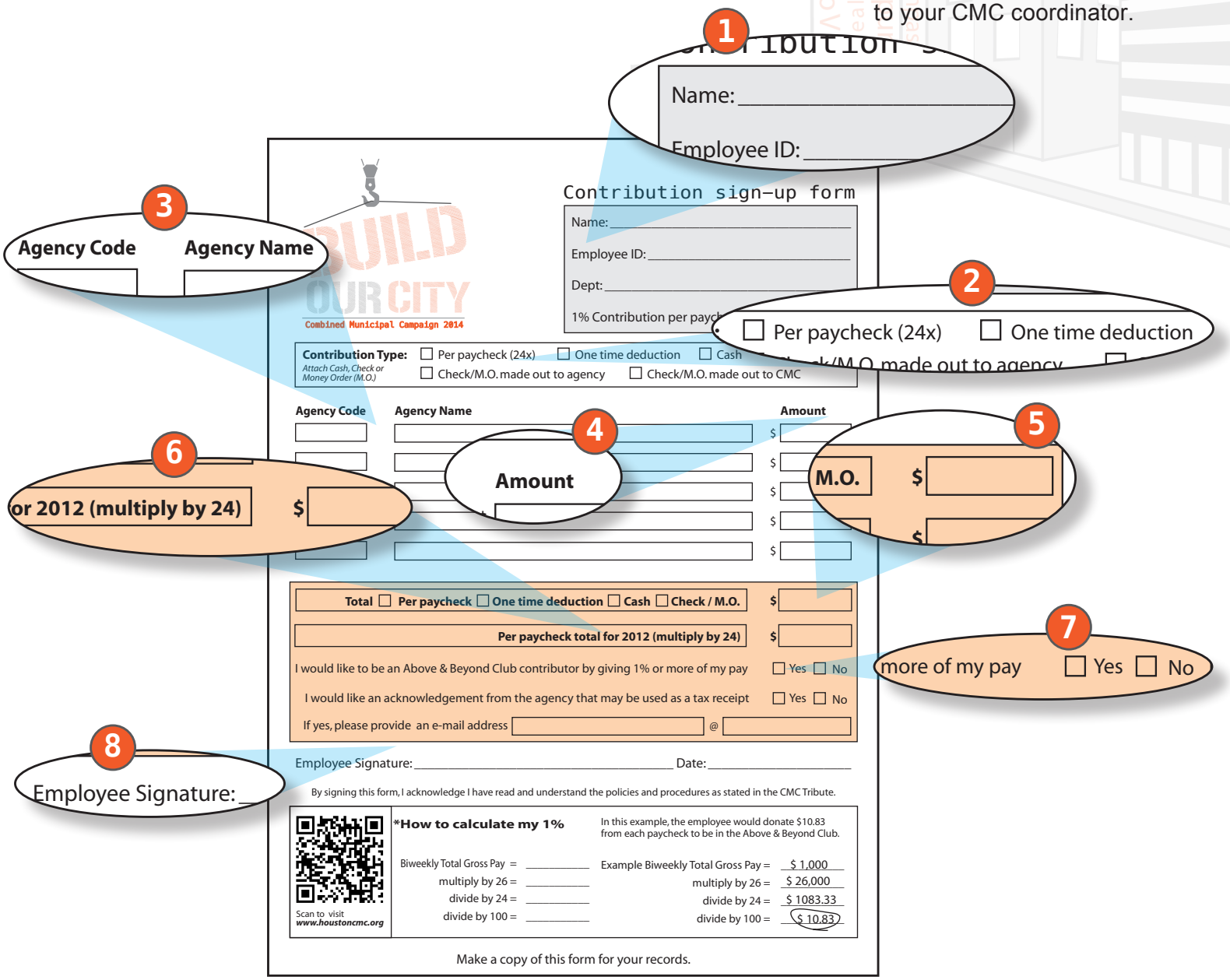
How to complete an online form

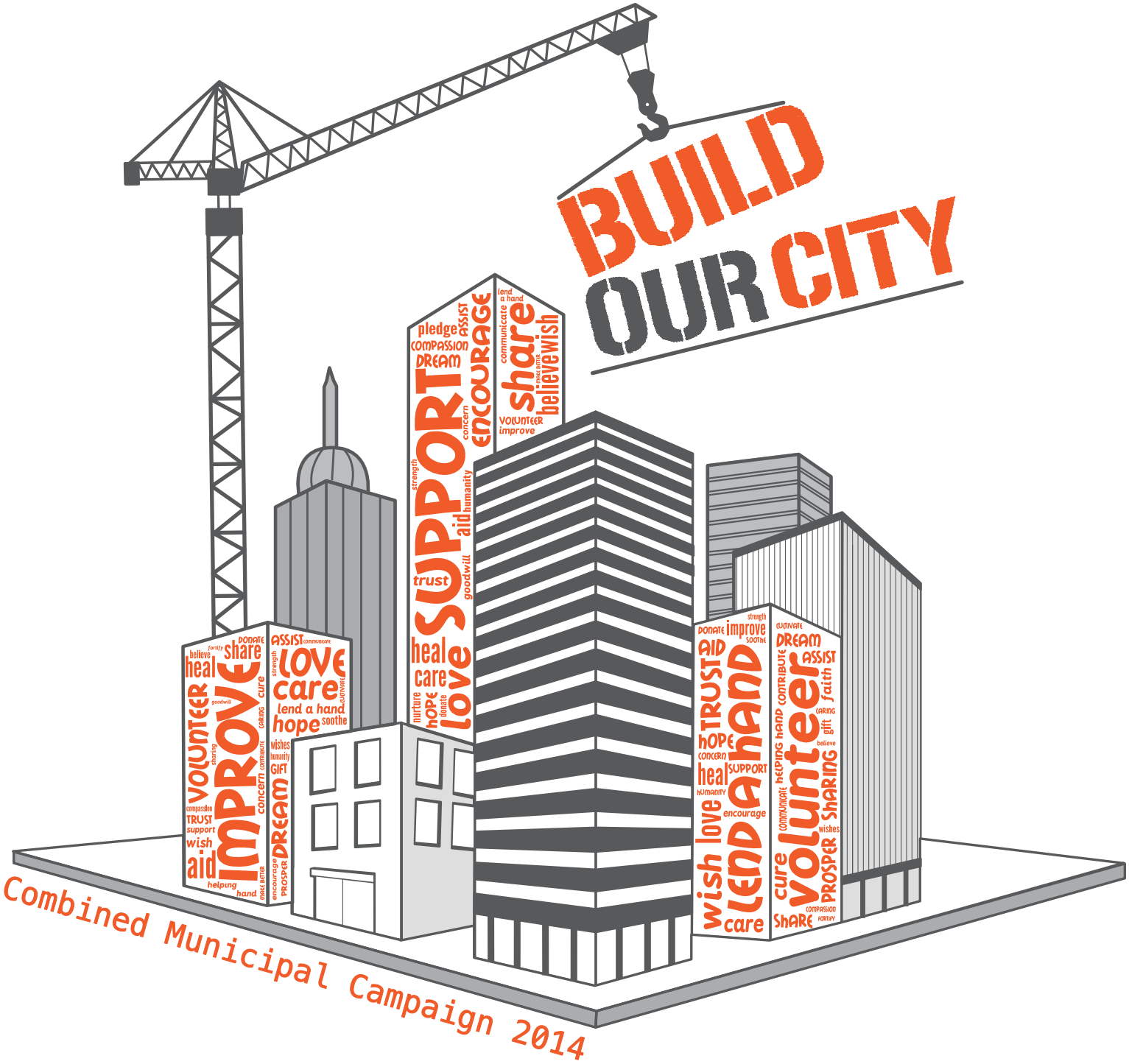
1. Go to www.houstoncmc.org and click donate, then log on to ESS and choose CMC Signup from the menu.
2. Fill in agency codes for your charities. If you don't know the codes, click "Search and Select Agencies."
3. Enter the amount you wish to give to each agency. If you would like to be an Above and Beyond contributor, your total per-paycheck amount must be equal to or greater than the 1 percent amount shown at the top of your form.
4. Choose a one-time or per-paycheck deduction. This will apply to all agencies.
5. Select an option acknowledgement. If you choose yes, you will need to enter your email address. Agencies will send your acknowledgement via email.
6. Click "Verify Selections" to check your form. The agency name and totals will now appear. If there are any errors, a message in red will appear at the bottom of the form.
7. After you have looked over your form for accuracy and corrected any errors, click "Continue to Confirmation Page."
8. The confirmation page shows a summary of your selections, per-paycheck and yearly totals, and displays your status as an Above and Beyond contributor. Review the information carefully. If you need to make corrections, click "Edit Selections." If everything is correct, you must check the box next to "I authorize the City of Houston to deduct my CMC



How to complete a paper form

1. Fill in first and last name, six-digit employee number and department name. Use the worksheet at the bottom of the form to calculate your 1 percent amount.
2. Choose a contribution type: Per-paycheck (24 times per year), one-time deduction, cash, check made out to agency or check made out to CMC.
3. Fill in agency codes and names for your charities.
4. Enter in the amount you wish to give to each agency. If you would like to be an Above and Beyond contributor, your total per-paycheck amount must be equal to or greater than your 1 percent amount. For one-time deductions, cash or checks, your yearly total must be equal to or greater than your 1 percent amount times 24.
5. Calculate your totals. For per-paycheck, multiply by 24 to get the yearly total.
6. Check yes next to "I would like to be an Above & Beyond contributor by giving 1 percent or more of my pay" if your contributions equal 1 percent or more of your salary.
7. Select an option for an acknowledgement. If you choose yes, write in your email address. Write clearly and legibly, agencies will contact you via email.
8. Sign and date the form.
9. Make a copy of the form for your records. Turn in the form to your CMC coordinator.





Nichole Robinson, CMC Chair

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