

**2010/2011 State Employees' Community Campaign**



**Now More Than Ever  
Agency Coordinator Manual**

**[www.insecc.org](http://www.insecc.org)**

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# Whom to Contact

## **Statewide SECC Coordination:**

**Jeff Sullivan/Jan Saylor**

**SECC Statewide Coordinator**

Indiana State Personnel Department  
402 W. Washington Street, Rm. W-161  
Indianapolis, IN 46204  
[jsullivan@spd.in.gov](mailto:jsullivan@spd.in.gov); [jsaylor@spd.in.gov](mailto:jsaylor@spd.in.gov)

**Responsibilities:** Reports to the SECC Director. Coordinates the SECC statewide. Establishes campaign timelines, organizes kickoff and award meetings, arranges agency coordinator training, distributes campaign materials, monitors campaign progress, and acts as a liaison to the state agency coordinators.

## **Campaign Services/Fiscal Issues:**

**Jean Geis/Kristin Brown**

SECC Campaign Services

Indiana Association of United Ways  
3901 N. Meridian St., Suite 306  
Indianapolis, IN 46208  
Phone: (317) 921.2242  
[jean.geis@iauw.org](mailto:jean.geis@iauw.org); [kristin.brown@iauw.org](mailto:kristin.brown@iauw.org)

**Responsibilities:** Provides policy and procedural consultation to the SECC Director and statewide coordinator. Makes recommendations to SECC Administrative Committee. Prepares SECC materials and trains state agency coordinators. Acts as a liaison to charitable organizations, processes pledges, compiles campaign reports, provides campaign analysis, prepares payroll transactions for the Auditor of State, and distributes contributions to charities.

# 2010/2011 SECC Administrative Timeline

September 9	<b>Kickoff and Charities Fair</b> 11:30 AM - 1:30 PM, Tuesdays and Thursdays IGCS Cafeteria and IGCN Cafeteria
September 17	<b>Weekly Report Envelopes due*</b>
September 24	<b>Weekly Report Envelopes due*</b>
October 1	<b>Weekly Report Envelopes due*</b>
October 8	<b>Weekly Report Envelopes due*</b>
October 15	<b>Weekly Report Envelopes due*</b>
October 22	Campaign wrapped-up; e-Pledge turned off
October 29	ALL pledges, Special Event Reports and paperwork <b>MUST</b> be turned in to the Statewide SECC Coordinator.
March 2011	Awards Ceremony for 2010/2011 SECC

**\*Weekly report envelopes should be turned in to Statewide SECC Coordinator in State Personnel. Success stories and pictures that Agency Coordinators would like to share with others should be sent to [jean.geis@iauw.org](mailto:jean.geis@iauw.org) or [kristin.brown@iauw.org](mailto:kristin.brown@iauw.org). Please include the name of the event and the names of people in the pictures. Pictures can be an incentive for employees to go to the SECC Web site.**

## 2010/2011 SECC At A Glance

**Theme:** *State Employees Make A Difference*

**Dates:** September 9 - October 22, 2010

**Participants:** Any 501(c)(3) nonprofit charity that can offer the donor a tax deduction is eligible to receive a contribution through the 2010/2011 SECC.

**Campaign Goal:** \$1.2 million

**Agency-Wide Awards:** Per Capita  
**GOLD** \$75 and Up  
**SILVER** \$60 to \$74  
**BRONZE** \$50 to \$59

Largest % Increase by Agency  
1-50 employees (Traveling trophy)  
51-250 employees (Traveling trophy)  
251+ employees (Traveling trophy)

Money raised through special events will not be included in the calculation for these awards.

### Champions Award

Recognition will be given to an agency if 20% or more of its givers make a contribution at the CHAMPION LEVEL of giving. (Champion givers are state employees who contribute one-half hour's pay per check.)

**Note:** Awards are given on an agency-by-agency basis. As coordinators, you may recognize divisions of your agency for outstanding performance. See list on Web site.

# Agency Coordinator Job Description

**Position:** Agency Coordinator

**Reports to:** Agency Head

## **Major Focus:**

Agency Coordinators, individually and collectively, are the most important people in the SECC. The success of the campaign in each agency is dependent upon the leadership of the Agency Coordinators. Under the direction of the respective Agency Head, an Agency Coordinator is responsible for the execution and successful conclusion of the campaign.

## **Responsibilities:**

- Attends a SECC training session.
- Encourages employees to visit charities in the Cafeterias beginning Thursday, September 9, 2010.
- Works with the Agency Head to create a campaign plan with agency goals, strategies, and timetables.
- Ensures the implementation of the agency's campaign plan.
- Recruits a campaign committee and communicates campaign strategies, expectations and reporting requirements to its agency.
- Establishes assistants within central offices and liaisons at each field location (particularly important with large agencies).
- Ensures that every agency employee receives a campaign brochure and promotes the online use of e-Pledge.
- Reports campaign progress weekly and keeps Agency Head advised on agency's campaign progress.
- Submits pledge cards to the State Personnel Department, 402 West Washington Street, Room W-161; Indianapolis, IN 46204; Attn: Jeff Sullivan, SECC Coordinator, no later than Friday, **October 29, 2010.**

# How to Run a Successful Campaign

You have been chosen for a very important job that will have a positive effect on thousands of people. Your efforts to raise money through SECC will have lasting results all year long. Thank you for helping to reach the SECC goal.

Follow these steps to run a successful campaign. For further information, see details on the SECC Web site, [www.insecc.org](http://www.insecc.org).

## 1. Get top level support

- \* Meet with your Agency Head or Department Supervisor; get agreement from him/her to endorse the campaign

## 2. Recruit a committee to help you

- \* Don't try to do it alone; get help from co-workers

## 3. Set a challenging goal

- \* Review last year's history
- \* Reach toward higher achievement

## 4. Emphasize payroll deduction as the easiest way to give

- \* Ask everyone to consider giving one-half hour's pay per pay check

## 5. Target special giving groups

- \* Torchbearer Society
- \* Non-givers
- \* Champions

## 6. Decide fund-raising technique

- \* Group meeting
- \* Educational fundraising

## 7. Keep campaign short and enthusiasm high

## 8. Follow Through, Report Results, Say Thanks

- \* Use SECC e-Pledge
- \* Make sure every employee has been reached
- \* Turn in paper pledge forms
- \* Thank volunteers and contributors for their support.

# The Employee Group Meeting

TIME	CONTENT	PRESENTER
1 Min	<b>Welcome</b> * Greet employees. * Distribute brochures. * Outline purpose of meeting. * Introduce Agency Head, a Supervisor, or management's representative to endorse the SECC campaign.	Agency Coordinator
2 Min	<b>SECC Endorsement</b> * Explanation of support by Agency Head or Supervisor. * Endorsement by employees who have used services from charities eligible to receive contributions through the SECC.	Agency Head, Supervisor or Senior Management
15 Min	<b>SECC Speaker</b> * Introduce speaker(s) * SECC Message	Charity Rep and/or Agency Coordinator
4 Min	<b>Campaign Information and Closing Remarks</b> * Explain e-Pledge and ease of payroll deduction. * Encourage employees to make their charitable contribution through the SECC. * Offer to answer questions individually after group is dismissed. THANK EMPLOYEES FOR THEIR SUPPORT!	Agency Coordinator

## Employee Meetings or Rallies

- \* Hold the meeting away from the normal work area.
- \* Arrange to have fellow employees share their experience with a participating charity.
- \* Arrange to have a Charity Representative speak at your meeting to talk about the clients they serve and the programs they provide.
- \* Call Jean Geis or Kristin Brown at 317.921.2242 to arrange for a speaker for your meeting.

# Continuous Giving

## Guidelines:

State employees who contributed through a payroll deduction in 2009 and who wish to continue that contribution are **not** required to make a new pledge. Their prior payroll deduction pledge will remain in effect for the 2010/2011 campaign unless it is changed by the contributor making a new payroll deduction pledge or by the contributor completing State Form AS47 to end it.

- \* **Completion of a new payroll deduction pledge will NOT ADD to last year's contribution, but WILL REPLACE IT.**
- \* **Making a one-time contribution will not stop a payroll deduction.**

Implementation, confirmation and affirmation of continuous pledges may take different forms in different state agencies. However, the following items should be addressed:

- \* Send a thank you email to each continuous contributor, assuring their awareness of the continuous pledge (see SECC Web site for Coordinator Resources/Sample Letters).

You can obtain a list of your continuous givers by logging in to the SECC e-Pledge System and, from the Reports menu item, running the Response Report for the previous year.

- \* Encourage continuous givers to visit the SECC Web site, **[www.insecc.org](http://www.insecc.org)**. Charities that received a contribution in prior years and their SECC Charity Codes are easily searchable on that Web site. There is also a link to the e-Pledge Web site.
- \* Continuous contributors may also review their giving history by logging into their e-Pledge account (encourage them to do so).

# SECC FAQs

## 1. Is the SECC the United Way campaign?

The State Employees' Community Campaign (SECC) is not the United Way. The SECC is your workplace fundraising campaign and is authorized by a Governor's Executive Order. We, the Indiana Association of United Ways (IAUW), are the contractor which carries out your SECC choices.

## 2. How does a charity get on the SECC list?

State employees can contribute to any not-for-profit organization that has a 501(c)(3) ruling from the United States Internal Revenue Service. When a state employee makes a contribution to a charity that does not already have a SECC code number, we verify that it has a 501(c)(3) ruling from the IRS, and, assuming it does, we assign it a code number. That charity then appears on the searchable list on the SECC Web site ([www.insecc.org](http://www.insecc.org)).

## 3. If I contribute \$100 to a charity, how much does the charity receive?

The administrative percent for the campaign is projected to be 8%. A donation of \$100 to a charity will net more than \$92. It is more than \$92 because the charity also receives a share of the interest income earned while the contributions are in the bank.

The administrative fee covers costs including printing materials, processing and tracking pledges, creating the payroll transactions and cutting quarterly checks.

Your SECC donation is tax deductible for the full amount that you give.

**4. If I make a payroll deduction pledge now, when will withholding start?**

Withholding will start with the first payroll in 2011.

**5. When are charities notified of my contribution?**

By January 15 of the year in which pledges are collected, we are required to issue a “final” report on the amounts pledged and the amounts designated to each charity. As soon as practical after that we send a notification letter to each charity accompanied by a list of their donors and their amounts pledged. If a state employee checks the “request acknowledgement box” when entering their pledge using the SECC e-Pledge system or when completing a paper pledge form, we also release the employee’s home address to the charity.

**6. How do I know that the charity I specified received my contribution?**

When using the SECC e-Pledge system or if you complete the SECC paper pledge form, there is a box you can check to request acknowledgment from the charities to which you contribute. By checking that box you authorize us to release your address to your charities so that they may send you a thank-you letter. The minimum contribution that can be acknowledged is \$26. We recommend that all state employees contributing through the SECC request acknowledgment by checking the box.

**7. If I make a contribution now, when will my charity receive my money?**

We are required to make distributions to charities in the month following the end of each calendar quarter. For the 2010/2011 SECC we will cut checks in April, July, and October of 2011, with the final disbursement due in February 2012. We withhold 8% of

the amount pledged to a charity from the first disbursement and we add their share of the interest income earned to the last disbursement. One-time contributions (cash, check, and credit card) are fully disbursed in the April check.

**8. When the charity receives an SECC disbursement, will they get a breakdown of the check showing my contribution?**

If the charity requests a breakdown of their quarterly SECC check, we will email them a spreadsheet showing their donors and the cumulative amount paid by each.

**9. Is my contribution through the SECC tax-deductible?**

Yes. Because you must direct your SECC pledge to a 501(c)(3) charity, and because the Indiana Association of United Ways itself has a 501(c)(3) ruling from the IRS, if you itemize when you file your federal income taxes, to the extent allowed by law, your charitable contribution is tax-deductible in the year that it is paid.

For example, if you make a pledge through the SECC to one or more charities in the Fall of 2009 and pay your pledge in 2009 by check, cash or credit card, that contribution may be claimed as a deduction in tax-year 2010. However, if you make your SECC pledge in the Fall of 2010 and pay it through payroll deduction in 2011, that contribution would be claimed as a deduction in tax-year 2011.

If you have questions or concerns about the deductibility of your contribution through the SECC, you should consult your tax professional for advice.

**10. How do I get written substantiation of my contribution for tax purposes?**

If you used the SECC e-Pledge system, it is suggested that you check the box to request a confirmation to be emailed to you.

You should also click the Print button on the final e-Pledge screen. If you completed a paper pledge form, you should retain the second copy. If you paid your pledge through payroll deduction, keep your year-end pay stub that shows the deduction codes and amounts.

If you paid by check, keep the canceled check; it satisfies the IRS requirement. If you are a state employee that paid your pledge by cash or credit card, the Indiana Association of United Ways, as the SECC fiscal agent, will mail you a written tax-receipt on January 31, 2011.

If you would also like to receive a tax letter from the SECC, you must request one before April 15, 2011 and one will be mailed to you.

**11. If I made a payroll contribution to a charity last year and I want to keep it the same, do I have to do anything?**

No. Under the rules of the SECC, payroll deduction contributions to charities are continuous until you make a change in writing. If you make a new pledge through the e-Pledge system or complete a new paper pledge form and it is paid by payroll deduction, it will replace the prior year's contribution; it will not add to it.

**12. How do I stop a payroll deduction pledge?**

The only way to stop a payroll deduction pledge is to complete State Form AS-47, available from your payroll representative.

**13. Will a cash contribution stop a payroll deduction pledge?**

No. If you make a one-time contribution (cash, check or credit card), it will **not** stop a previously made payroll pledge.

**14. How many charities can I contribute to?**

There is no limit.

**15. The charity I want to donate to is not listed on the SECC site.**

**Why is that?**

Charities listed on the SECC web site have been researched and it has been verified that they have a 501(c)(3) ruling from the IRS. They are then assigned an SECC code number and added to the data base. If the charity you want to donate to is **not** listed, you may write in the name of the charity, address and/or phone number. Once IaUW receives the pledge with the information, they will verify that the charity has their 501(c)(3) ruling from the IRS. If the charity has the proper credentials, they will be assigned an SECC code number and will appear on the e-Pledge Web site the following year. If the charity does **not** have their 501(c)(3) IRS ruling, IaUW will notify you that the charity does not qualify under the SECC guidelines and you will be asked to choose a different charity.

**16. Is there a minimum contribution amount?**

Yes, the minimum payroll deduction pledge is \$1 per pay, \$26 dollars annually. The minimum one-time contribution (cash, check, or credit card) is \$5.

**17. How do I find a list of charities?**

Log on to [www.insecc.org](http://www.insecc.org). Click on Charity Codes. You may search for a charity's SECC code number by entering a word or two that is part of the charity's name. Click the Search button and you will see all charities listed with that word in the name. It is not recommended that you click on the View All button since there are approximately 2,000 charities with codes in the SECC database and it takes a long time to scroll through them. (See the SECC e-Pledge section on page 15 of this manual for more information)

### 18. What is a Champion donor?

Champions are people who put forth extra effort to reach a goal. **SECC CHAMPIONS** are state employees who pledge one-half hour's pay per check. We recommend that you consider making a payroll contribution equal to one-half hour's pay per check. State employees that contribute a half-hour's pay per check are **CHAMPIONS**, a giving recognition program of the SECC.

Hourly Rate	Champion Per Pay Deduction	Yearly Contribution
\$10	\$5	\$130
\$12	\$6	\$156
\$14	\$7	\$182
\$16	\$8	\$208
\$18	\$9	\$234
\$20	\$10	\$260
\$22	\$11	\$286
\$24	\$12	\$312
\$26	\$13	\$338
\$28	\$14	\$364
\$30	\$15	\$390

### 19. What is The Torchbearer Society?

We call our leadership giving recognition program **The Torchbearer Society**. Membership in **The Torchbearer Society** is open to those individuals who have the commitment to make a leadership contribution of \$1,000 or more through the State Employees' Community Campaign. There are three recognition levels based on the amount of your annual SECC contribution:

**Torch Lighters** contribute \$1,000 to \$1,499 annually

**Guiding Lights** contribute \$1,500 to \$2,499 annually

**Shining Stars** contribute \$2,500 or more annually

In 2009, 201 state employees made such a generous commitment.

# SECC e-Pledge

1. Log on to the SECC Web site: [www.insecc.org](http://www.insecc.org)
2. You can check to see if your charity has a 501(c)3 ruling and search to see if it already has an SECC Charity Code.
3. Click on “Pledge Now.”
4. SECC e-Pledge will guide you through the entire process from start to finish.

**SECC e-Pledge is fast. It’s easy. It’s secure.**

## **The SECC e-Pledge Log in Screen:**

Enter your SECC e-Pledge **User ID**. It is the first letter of your first name plus the last 6-digits of your PeopleSoft number.  
(SECC e-Pledge is not in any way connected to the PeopleSoft system.)

Enter your **Password**. It is the first letter of your first name, plus the first two letters of your last name (skip special characters like an apostrophe) plus your 4-digit birth year.

Click the Log in button and you will arrive at the SECC e-Pledge home page.

## **SECC Home Page:**

From the home page you can make a pledge, check your giving history, and as an administrator, run reports.

## **Account History:**

When you click on the link for Account History you will be able to review your prior years’ contributions.

Follow the directions on the Account History screen to renew or change your previous pledge.

The campaign years in the report are listed as 2010/2011 because the pledge is made in 2010 and paid out in 2011.

### **Making A Pledge:**

Click on the link for “Pledge Now” and indicate whether you want to make a contribution by payroll deduction, credit card or not at all.

If you want to contribute by cash or check you must complete a SECC paper pledge form. Attach the cash or check to the pledge form and give it to you coordinator.

If you do not wish to contribute to the 2010/2011 SECC click the radio-button for “I do not wish to make a pledge this year” so that your coordinator knows that you have made a decision.

Click the Next button after making a giving method decision and click Next again on the information screens that follows.

### **Choosing The Charities To Which You Want To Contribute:**

You must now choose the charities you want to contribute to.

You may search for a charity’s SECC code number by entering a word or two that is part of the charity’s name. Click the Search button and you will see all charities with that word in the name.

We do not recommend clicking the View All button since there are approximately 2,000 charities with codes in the SECC database and it takes a long time to scroll through them.

After you click the Search button, on the next screen, select the charities to which you wish to give and enter the amount. After entering a pledge amount, click the Add button.

You may need to scroll down to see all the choices.

Enter the amount per pay if you are giving by payroll deduction or the total amount if giving by credit card.

After clicking the Add button, you will be returned to the Search screen. You may choose to contribute to as many charities as you wish by repeating the process.

If you want to write-in the name and address of your charity, you may scroll down and click the Write In button.

The Write In screen will allow you to type in the amount you want to contribute to the charity, as well as the charity's name and address.

Click the Add button after you have entered the information.

When you are finished choosing your charities, click the Next button at the bottom of the Search screen.

### **Finishing your pledge:**

On the next screen, if you would like the SECC e-Pledge system to email you a confirmation, check the confirmation box. Enter your email address in the space provided. We strongly recommend you request a confirmation.

We also suggest that you check the box to receive an acknowledgment so that we may release your address to the charities you donated to. Click the Next button.

On the Review and Confirm screen, carefully review your pledge decisions.

If you want to make a change to your pledge or the charities you chose, click the Previous button. **Do not** use your browser's Back button.

If your information is correct, click the Confirm button. Your pledge will be recorded.

If you click the Cancel button, you will return to the home page and no pledge will be recorded.

On the “For your records” screen, you can print a copy of your pledge and then log off.

We strongly recommend that you print a copy of your pledge and put it in a safe place; it will serve as your written receipt for tax purposes.

That’s it. You’re done making a pledge. Don’t forget to **log off** and **close** your browser window.

### **Reports:**

As an administrator, you will have a Reports menu item. State employees that are not administrators will not have the Reports menu. If you log in and do not see the Reports menu, please contact Jean Geis or Kristin Brown to clarify your status as a SECC Coordinator.

When you click on the Reports menu, you will be able to run a number of different reports that will make your job easier. We will discuss how to run those reports at Coordinator training.

Reports use abbreviations to describe the columns. The following are a few you will see:

**DC** – Designated Contribution. All SECC contributions need to be designated to a charity.

**Ack** – Employee has requested an acknowledgement from the charity they have contributed to and their name and address has been released to the charity.

**Ldr** – Contribution has reached the Torchbearer Society level (\$1,000 or more)

**Pub** – After the campaign, all Torchbearers are asked if they would like their name published on the Torchbearer Roster. This is set to a default of N until each person is contacted.

# Fun(d)-Raising Ideas

**Please note: Special Events should only be used to raise *awareness* and create enthusiasm. The most effective way for employees to give is through payroll deduction.**

## **Hold Employee Meetings or Rallies**

- Hold the meeting away from the normal work area.
- Invite a speaker from a nonprofit organization to talk about their programs or have a fellow employee share their experience .

## **Publicize Your Event**

- E-mail messages, agency newsletters, posters, banners, thermometers. Keep everyone updated on campaign progress.

## **Use a Theme**

- Summer Camp, Star Wars, Glee, American Idol, Survivor, Deal or No Deal, etc.

## **Encourage Contests**

- Some examples are Cutest Pet Contest, Jeopardy, Wii Olympics, Corn Hole or Password with team competition.

## **Other Ideas**

- Executive car wash, Compliment-O-Grams, Bonus Casual Day.

**Lotteries and raffles are not permitted in the SECC campaign.**

**Events that involve preparing food are not encouraged because of health and safety concerns.**

**Report special event results on the SECC Special Events Report Form. It can be downloaded from the SECC Web site, [www.insecc.org](http://www.insecc.org). Click on the link for Coordinator Resources.**

**Rolled coins or large quantities of loose coins should be converted to paper currency, check, or money order.**

# SECC Reminders

Encourage all employees to visit the SECC Web site by emailing them the URL [www.insecc.org](http://www.insecc.org).

Employees can review their giving history and make a new pledge, choose either payroll deduction or a one-time donation.

- Choose your charities and amount. If your charity already has an SECC Charity Code, select it and enter the amount in the space provided. If your charity does not already have an SECC Code, enter the name, address, and amount in the space provided for write ins.
- Check the box for acknowledgement if you want to receive a written thank you from the charities you chose.
- Click the confirm button.
- You **must** choose a charity in order for your pledge to be processed.
- The minimum donation to any single charitable organization is \$1.00 per pay period, or \$5.00 for a one-time gift. One-half hour's pay per check is the recommended amount.

If you would like to contribute by writing a check or giving cash (not recommended), blank pledge forms are available on the Web site. Make checks payable to the SECC. Attach the check or cash to the pledge form and give it to your coordinator.

Bill-me and one-time payroll deductions are not an option.

Pledge forms are read by a scanner; please do not write outside of the boxes provided!

Do not leave any section blank. Without the following, the card will be returned:

- Name
- Method of Payment box checked
- Charities) indicated
- Signed and dated

Do not write anything other than numbers in the amount or charity code boxes. Dollar signs (\$), dashes (--), or lines will stop the scanner and slow processing of your results.

Tearing up, crossing through a pledge card, or writing a note on the pledge card will **NOT** stop a payroll deduction. Likewise, making a one-time contribution will not stop a payroll deduction.

**An employee MUST complete State Form AS47 obtained from his or her payroll representative if he or she wishes to stop a payroll deduction.**

**For those agencies located in the IGC:**

Normally, when putting up signs in the Indiana Government Center, you need to file a request through the Department of Administration. However, they have always permitted signs to go up around SECC time without making this request. We do ask that you not tape any signs to exterior doors or painted/varnished doors and walls. Also, please make it a point to take down all of your signs once your event is over. If you are holding a bake sale, you need to hold it in your agency area, not in the atrium, cafeteria area, etc. While the SECC does not encourage bake sales, we are not going to be the cookie police.

# Resources

Please see additional information on the SECC Web site. Some useful information you might want to access is listed below.

- \* SECC Web site: [www.insecc.org](http://www.insecc.org)
- \* This Coordinator Manual
- \* SECC FAQs for State Employees
- \* SECC Ten Steps to Success
- \* How To Make a Pledge
- \* Sample Letters
- \* Per capita listings
- \* Last year's results
- \* How to handle objections and concerns
- \* Why Should I Give?
- \* And more!!

To arrange for a charity speaker or if you need help in organizing a workplace meeting, contact:

**Jean Geis/Kristin Brown**

(317) 921.2242

[jean.geis@iauw.org](mailto:jean.geis@iauw.org); [kristin.brown@iauw.org](mailto:kristin.brown@iauw.org)