

“KEYS TO SUCCESS”

The Campaign Coordinator’s Guide to Successful

Army Emergency Relief

Fund Raising



Revised November 2009

Headquarters
Army Emergency Relief
200 Stovall Street
Alexandria, Virginia 22332-0600
Telephone 703-428-0000 (DSN 328-0000)
1-866-878-6378

www.aerhq.org

This guidebook is designed and written to provide a ready, single source, resource for YOU, the Army Emergency Relief Campaign Coordinator and for anyone else who is associated with the AER Annual Fund Raising Campaign.

KEYS is presented in chronological order, enabling you to see the overall scope of the project from start to finish. Each “Key” section contains links to related activities so the document is also a working tool for answering questions as they arise.

“KEYS”

1. WHY HAVE AN AER CAMPAIGN?
2. COMMAND SUPPORT
 - a. “Soldiers only support what the Commander supports”
 - b. Chief of Staff Army
 - c. Your Commander
3. ORGANIZING FOR SUCCESS
 - a. The KEY PERSON concept
 - b. Selecting your team
 - c. Training your team
 - d. Deployed Units
4. PUBLICITY
 - a. AER Headquarters
 - b. Installation and Local Activities
5. SOLICITING CONTRIBUTIONS
 - a. The HEART of the Campaign
 - b. Civilians (Special Situation)
6. ACCOUNTABILITY
7. PROCESSING CONTRIBUTIONS
 - a. Samaritan for Allotments
 - b. Samaritan for Checks
 - c. Samaritan for Cash
 - d. Memorials and Bequests

8. AFTER CAMPAIGN ACTION
 - a. After Action Report
 - b. Continuity File
 - c. Expressions of Appreciation
 - d. Final Results Publicity

9. KEY TIPS

REFERENCES

(Available at: <http://www.aerhq.org>)

Army Regulation 930-4, Chapter 5 Fund Raising
Army Emergency Relief Section Reference Manual, Section 6
Samaritan User Manual

WHY HAVE AN AER CAMPAIGN?

The Army conducts its Army Emergency Relief Fund Raising Campaign annually during the period 1 March through 15 May. The Army selected this time period to allow Installation Commanders maximum flexibility in scheduling their local campaigns in coordination with other training and support missions. Additionally, these dates permit us to complete the Campaign in time to meet the mandatory allotment start date of 1 June directed by the Defense Finance and Accounting Service (DFAS) for all Military Services' fund raising campaigns.

Why do we have an annual fund raising campaign? There are three reasons why we conduct an annual fund raising campaign:

- a. A campaign promotes awareness of AER benefits and programs that are available to active duty Soldiers, retirees, widows, and Family members.

- b. The campaign provides a wonderful opportunity for all active duty and retired Soldiers to contribute to the welfare of their fellow Soldiers.

- c. Campaign donations insure that AER meets the requirement for status as a non-profit, tax exempt 501 (c) (3) organization.

Why don't we solicit contributions from civilians? The Army has steadfastly held that only those persons eligible to receive assistance from AER should be solicited to contribute to the fund. However, we do accept unsolicited contributions from any person or group.

COMMAND SUPPORT

The axiom that “Soldiers only do what the Commander checks” applies as equally to AER Fund-Raising Campaigns as it does to conducting a live fire military operation. In fact, SUCCESSFUL campaigns are successful, in part, for this very reason -- the fact the leadership demonstrates that it's important, tells Soldiers that it's important.

The Secretary of the Army, Chief of Staff Army, and Sergeant Major of the Army emphasize the importance of AER and its annual Fund-Raising campaign when they send their letter to Soldiers and Families, announcing the campaign and describing the virtues of supporting this activity.

You will receive copies of this memo in the packet of current information we send you prior to the start of the Campaign.

You have a KEY role in developing and promoting command support at your installation. You should accomplish these activities with your Installation and Garrison Commanders:

- Fully brief them on the AER campaign.
- Request they participate in a “kick-off” activity.
- Request they reinforce the importance of the Campaign throughout the installation's chain of command.
- Keep them informed of the campaign results throughout the campaign period.

Campaign Keypersons must be knowledgeable of AR 930-4, Chapter 5 and pay particular attention to paragraph 5-3(c) which states:

*c. In conducting the campaign, commanders will—
(1) Designate a campaign coordinator (normally not the AER officer or assistant).*

(2) Ensure that procedures are established to conduct the campaign.

(3) Conduct it as a separate campaign.

(4) Base campaign on voluntary contributions. Assure that each soldier is given the opportunity through on-the-job solicitations, and other fund-raising events, to contribute voluntarily under policies and procedures in this regulation. Practices that involve compulsion, coercion, or reprisal to soldiers because of the size of their contributions or their failure to contribute must be avoided.

(a) Dollar goals may be set at the installation level.

(b) Individual goals, quotas, or prescribed amounts for individual contributions are not permitted nor will lists of noncontributors be compiled for any reason.

(c) Each individual will have the option of disclosing or keeping his or her contribution confidential.

ORGANIZING FOR SUCCESS

Organizing to accomplish the mission plays as critical a role in the AER Campaign as it does in any successful military operation. **An organization that follows the chain of command has repeatedly demonstrated the most successful results.** Therefore, we recommend that you organize your KEY PERSONS along chain of command lines.

When you select and train a KEY PERSON in each unit at your installation, you insure that you have a responsible, knowledgeable, and trustworthy individual to perform the campaign duties at unit level. Preferably, the persons selected should be those who have volunteered to be a KEY PERSON. Ideally, you would like a volunteer who has personal first hand knowledge of the help AER provides to Soldiers.

An ideal KEY PERSON campaign chain of coordination will have one KEY PERSON in each Company, Troop, Battery or comparable size unit at your installation. (Approximately one KEY PERSON for each 100 Soldiers assigned.) This method has the added advantage that the KEY PERSON, in all likelihood, personally knows their comrades and can explain AER to them with relative ease.

YOU, the Campaign Coordinator, must train the KEY PERSONS. This training should consist of ALL information contained in this booklet plus any procedures that are unique to your command/installation. If it is impractical to assemble all KEY PERSONS at one time in one location for training, then you should use distributed training wherein you train the Brigade KEY PERSONS who in turn train their Battalion and Company KEY PERSONS. This booklet is on the AER website in PDF format and can be downloaded and printed as needed.

SUCCESS does not just “happen;” it is cultivated through proper and diligent selection and training of the campaign work force.

DEPLOYED UNITS

Garrisons with units scheduled for deployment during the campaign period may wish to request early distribution of some of their materials to ensure deployed units receive materials in a timely manner. Working with deployed units takes additional coordination, but is worth the effort. Below are the major steps Ft. Campbell takes in ensuring its deployed units still participate in their campaign – not only in terms of offering every Soldier the opportunity to contribute, but also ensure they know about their AER benefits.

The Fort Campbell model:

- Obtain the long-range training calendar from the G-3 office to understand the tentative dates on when all major units were being deployed. Based on these dates construct a priority calendar in an attempt to catch the units that were deploying in the very near future.
- Establish communications with the command group of all units. In most cases, speaking with the Operation SGT/SGM is the best route to go. Through the Operations SGT/SGM obtain time on the training schedule. Since most units may be busy with pre-deployment operations, you must make yourself available to them even during off-duty hours.

- Once time is scheduled from the unit, provide a tailored briefing geared toward their particular circumstances while deployed. Also at that briefing have everyone fill out a sign-in roster which includes AKO email addresses for future communication.
- Once the unit is firmly on the ground in Iraq/Afghanistan reestablish communications with all unit representatives. Once physical addresses are established, prepare and ship a box consisting of DA 4908, a copy of the briefing slides so Company level representatives could be trained, and your return contact data.
- At least once a week email each representative to check on the status of the campaign. Notify the Operations SGT/SGM when encountering an unresponsive unit.
- Receive contributions back and a confirmation that 100% personnel were notified. Enter contributions in Samaritan and send total count back to the deployed unit acknowledging and thanking them for their support.

PUBLICITY

The best-organized campaign will never be known and understood by its audience unless it is publicized.

Headquarters AER provides four color wall posters, tri-fold Pocket Guide flyers for publicity and information, and plastic bags for the KEYPERSONS to use in carrying the publicity material and the DA Forms 4908. We ship these materials via UPS and/or USPS to arrive at your installation by mid January prior to the March 1 campaign start date.

We send all materials to you in the quantity and to the address you specified in the previous year's Campaign After Action Report. Generally the posters are provided in the ratio of one per 200 Soldiers, the flyers are in the ratio of 1.5 per assigned Soldier, and the plastic tote bags in the ratio of one per 100 Soldiers. Please contact Headquarters AER if you need additional materials.

Local publicity can take many forms and is only limited by your energy and imagination. Examples of successful publicity are newspaper articles, radio and television interviews with the Campaign Coordinator and Commander, “Kick-off” breakfast/assembly, Commanders’ meetings, etc.

- One installation enlarged the SA/CSA Letter to Soldiers and used that as a supplemental poster.
- Another installation printed labels with contact data for their unit KEY PERSONS and affixed them to the AER Campaign posters.
- Other locations and units have held runs or golf outing to benefit their Annual AER Campaign.
- Brainstorming publicity with your installation Public Affairs Officer may lead to new and innovative ideas that are applicable to your local situation.

Headquarters AER will publish a generic press release and an information paper (updated annually) which you can use as background information for your local publicity. You are encouraged to modify the generic press release with local installation data to personalize it to your installation. We will send these documents to you in January and it will also be available on our website.

Please do not forget the **Retired Soldiers** who live near your installation. One way to reach these Soldiers is to include a notice about the AER Campaign in your local Retiree Newsletter (or similar mailing) that your Installation Retirement Service Office sends to all retirees in your installation’s support area. HQAER sends all Retired Soldiers located in CONUS locations a solicitation letter, donation form and Pocket Guide. The contribution forms direct these donations to the AER section located closest to them. Additionally, each year AER Headquarters publishes an article in ARMY ECHOES, the Army wide retiree newsletter which is mailed to all retired Soldiers.

At the end of the campaign, please do not forget to publicize your installation’s results along with recognizing those who assisted in its success.

SOLICITING CONTRIBUTIONS

The Heart of the Campaign

“You can’t get donations unless you ask” Long time fund raising pros know that the heart of any campaign is the actual solicitation within your target audience. The concept in the AER Campaign is to have each KEYPERSON publicize the program and solicit donations from their fellow Soldiers in their own unit. This is conceptually the hardest part of the campaign because it takes a special personality to feel comfortable asking fellow Soldiers to contribute money.

As stated earlier, selecting the KEYPERSON is the critical element. That person must publicize the Campaign throughout his/her unit and then make **PERSONAL contact** with each Soldier for whom they are responsible to solicit.

The best solicitations result when a KEYPERSON explains the AER assistance concept, hands an Army Emergency Relief Pocket Guide and a DA Form 4908 to the Soldier and closes with a request for a donation. Some suggested closing lines are:

- “Will you please contribute to AER?”
- “How much can we count on from you?”
- “How much will you donate to help your fellow Soldiers?”

Civilians (Special Situation)

Army policy is that solicitation of contributions should only be from individuals who are eligible to receive assistance from AER. **Therefore, we do not actively solicit from civilians such as civilian employees of the Army and civilians within the local communities surrounding our installations.**

However, because of our Campaign publicity many civilians voluntarily offer to contribute. You may accept these contributions and add them to the Campaign totals.

When the contributor makes a contribution, the KEYPERSON should ensure that a DA Form 4908 is completed and that Copy 1 is given to the contributor.

There are other ways for anyone (options for civilians) to donate to AER:

1. Donate via credit card on our website www.aerhq.org OR
2. The donor can utilize the on-line bill pay feature at his banking institution and set up AER as a recurring monthly payment. Using this option:
 - a. funds are drawn directly from the donor's bank account
 - b. the donor can start or stop this donation anytime.

ACCOUNTABILITY

Whenever you are dealing with money, you must have a plan and a system in place to insure that the program is accountable to the contributors. Regrettably, when cash and negotiable instruments (checks) are involved, the temptation is present for dishonest individuals to steal from their fellow Soldiers. Fortunately, in AER, cases of dishonesty are rare because the people selected to conduct the Campaign are honest and trustworthy. **A KEY important element for good accountability is the process you use in selecting and training the people who will work the campaign.**

The second most important element is using the DA Form 4908 as a receipt for exchanges of money. The form contains a "Control Number" field in which the Campaign Coordinator **can** assign a unique sequential control number for each form given to a KEYPERSON. (Control numbers enhance accountability, not only for the forms, but also for the turn in of contributions. **Use of control numbers is not mandatory.**) The form has been designed to facilitate exchanging receipts for contributions at each step in the process.

- The top page (Copy 1) is given to the contributor by the KEYPERSON when a contribution is made.
- Copy 2 is the "File Record" copy and is maintained by the AER Office for four years following the completion of the Campaign.
- Copy 3 is given to the Campaign Coordinator IF they make a turn-in to the AER Officer. (Copy 3 is not used if the Campaign Coordinator is responsible for mailing

money to the bank and processing allotments into the Samaritan system.)

- Copy 4 is given to the KEYPERSON when they make a turn-in to the Campaign Coordinator.

Physically securing cash and check contributions from the time of receipt until they have been mailed to the bank is the third element of accountability. You are individually responsible to comply with your Installation Physical Security SOP. Prudence would dictate that each individual who handles cash contributions have a lockable container, access to which is limited to that individual.

Accountability can be significantly enhanced by **promptly** sending all contributions to the appropriate repository. Cash should be converted to a check or money order and sent along with other check contributions to the AER central bank **at least weekly (or more frequently if volume dictates)**. Allotment contributions should be entered into the Samaritan program as soon as possible.

PROCESSING CONTRIBUTIONS

Contributions can be any one of three forms:

- Allotment deduction from Soldier's pay.
- Personal check.
- Cash.

DA Form 4908

All contributions should be recorded on DA Form 4908. The top portion of the form is completed by the KEYPERSON for all contributions, regardless of whether they are cash, check, or allotment.

- AER Section # is obtained from your AER Section Officer. (Co Code is not used at Section level; leave blank.)
- Control Number is a locally developed identifier used to control the Form 4908

The donor completes the rest of the form:

- Name, Grade, SSN, Organization, and Status of contributor; check or cash amount of contribution.
- Soldiers contributing by payroll allotment should check the block corresponding to the amount they wish to contribute per month, check the number of months block, and place the total dollar amount of their contribution in the appropriate field.
- The form must be signed by the Soldier for an allotment to be valid.

Once the Soldier has completed and signed the DA Form 4908, the KEYPERSON should give Copy 1 to the Soldier as a receipt. The rest of the copies are turned into the designated collection point. Again, we can't emphasize enough that turn-ins should be made at least weekly - more frequently as necessary.

All contributions are to be processed to Headquarters AER through the Samaritan program. The Samaritan user instructions (available from your AER Section Office and in the Samaritan Help file on line) give you the instructions for entering the data and processing each type of transaction.

ALLOTMENTS

Allotments are the best and preferred method for contributing because they allow Soldiers to budget their contribution with a constant dollar amount over a period of months. This has traditionally resulted in larger total donations. Additionally, no cash is involved, thereby minimizing the security problem for all people involved with the campaign. Throughout the campaign, the Coordinator should urge the use of this method of contributing.

After entering allotment data into Samaritan, double check that the data entered agrees with the allotment form 4908. Make sure that the dollar amount and number of months was entered correctly. If a mistake has been made, open the donation record and modify. A quick double check will prevent errors that ultimately adversely affect your Soldiers.

CHECKS

Check contributions are welcome, but they are somewhat less secure than allotments and require a bit more work by the Campaign staff to process them. All checks must be reviewed to insure that:

- They have a valid date.
- The payee must be **Army Emergency Relief** (or AER), written on the “payee” line of the check.
- The dollar amount in figures must match the dollar amount written in words on the check.
- The contributor must sign the check.

Please process checks rapidly. The Campaign Coordinator should insist that checks be mailed, along with their deposit ticket, to the AER central bank **at least weekly**. **When preparing deposits, you may ONLY select up to 50 items for each deposit slip. Mail to the bank no more than 50 items plus one deposit slip per envelope.** During periods of heavy volume turn-in, checks should be mailed daily to the bank if the volume of contribution dictates. **Prior to mailing checks to the bank, endorse the reverse side of the checks using the AER “For Deposit Only” rubber stamp at the AER Section.**

CASH

Cash contributions, while always welcomed, are the most sensitive and the most prone to theft. Insisting that the Soldier complete the DA Form 4908, ensuring that contributors receive a receipt signed by the KEYPERSON and assuring that the forms are controlled through the use of pre-assigned control numbers only help to temper the security problem. **Cash must be secured and accounted for at all times.** Upon turn-in, the Campaign coordinator must purchase a check or money order to transfer the cash contributions to the AER central bank.

You are authorized and encouraged to combine multiple cash contributions and purchase a bank check or a money order, using part of the cash contribution to pay for the item.

The suggested method of processing cash contributions into Samaritan is:

- Enter the individual contributions into Samaritan at the full contribution value.
- Verify the amount of cash against the DA Forms 4908 you intend to process.
- Purchase a check/money order; pay fee from contribution.
- Click on the “Convert” link and select contributions to be converted.
- Enter the cost of the check or money order in the dialog box that appears.
- Print the deposit ticket.
- Mail the checks/money order and Part 1 of the deposit ticket to the address on the ticket. Mail Part 2 to HQAER (address is on the ticket) and retain Part 3 in your files for your records.

Memorials and Bequests

During the campaign period you may receive contributions that the donor wishes to designate in memory of another person. (Former spouse, friend, co-worker, etc.) These are processed much like regular contributions. When entering memorials in Samaritan, select “Memorial” from the Event drop down menu and enter the data required. Additionally, special actions are required: A thank you letter should be sent to the contributor, regardless of the amount of the contribution. Also, send a letter notifying the memorialized person’s next of kin of the memorial.

Please send a copy of the memorial NOK letter to HQ AER for information to be included in the Annual Report.

Forward any information about bequests directly to HQ AER, Attn: Deputy Director for Finance. (This can be by e-mail, telephone, fax or postal mail.)

AFTER CAMPAIGN ACTIONS

AFTER ACTION REPORT

The format for the Campaign After Action Report is available at Tab 6 in the AER Section Reference Manual. This report should not only satisfy reporting requirements for your chain of command, but it also gives Headquarters AER valuable information necessary to help us meet your requirements for next year's campaign.

Following receipt and final processing of bank deposits reconcile all donations with your Samaritan reports. The final total which comes from HQAER includes all cash/check donations received and processed through HQ plus the total of all allotments accepted by DFAS. Principle causes of discrepancies are:

- Bank deposits lost in the mail.
- Errors on deposit tickets.
- Allotments rejected by DFAS:
 - SSN/name errors
 - Duplicate/multiple allotments from same Soldier
 - Retirees with VA waiver
 - National Guard and Reserve Soldiers
 - Civilians

When you input information into the Samaritan program early and often, we can catch most of the discrepancies and correct them right away. If the errors are discovered following the end of the campaign, they frequently cannot be corrected.

CONTINUITY FILE

Following the campaign, the Campaign Coordinator should document activities, problems, solutions, and recommendations for future campaigns by assembling a continuity file to be available for next year's coordinator to use.

EXPRESSIONS OF APPRECIATION

You can obtain Expression of Appreciation certificates from Headquarters AER that can be individualized and issued to those campaign support persons whom you believe deserve such recognition. These certificates are published annually and are designed for you to personalize and have signed by your installation commander or their designated representative.

FINAL RESULTS PUBLICITY

Once the campaign is finished and you have resolved your final contribution numbers with Headquarters AER, don't forget to prepare publicity for your installation news media announcing the results of the campaign. You should coordinate this action with your installation Public Affairs Office.

KEY TIPS FOR SUCCESS

- Command support begins with your Installation Commander.
- Build Command Support at your installation.
- Organize a KEYPERSON tree based on the chain of command at your installation.
- Select winners for your KEYPERSONS.
- The goal is 100% solicitation through PERSONAL contact.
- All contributions must be voluntarily given. Absolutely no coercion is permitted.
- No contribution may be used for campaign expense except to purchase money orders for cash conversion.
- Enter all contributions into the Samaritan program.
- Input contribution data early and often -- daily if possible.
- DO NOT submit allotments directly to Finance/DFAS offices.
- It is not necessary to enter SSNs for cash and check contributions.
- Set allotment start date as June 20XX.
- Insure AER Section number is correct.
- If you are processing a lot of contributions from one unit, set that unit as the default. (Saves a lot of typing.)
- Insure that correct selection of Active/Retired is made.
- Double check all Social Security numbers for accuracy.
- Double check totals after data entry for allotment data.
- Send check contributions and deposit ticket (AER Form 51) to AER Bank at least weekly.
- DO NOT send DA Forms 4908 to HQ AER. File them with your AER Section.
- Prepare After Action Reports and send to HQ AER not later than 30 June.
- Send a tax letter to contributors of \$250 or more. (See example in AER Section Reference Manual.)