



Combined Federal Campaign of the National Capital Area

KEYWORKER TRAINING

2011 LE TRAINING

OPM Innovator Award Recipient 2003-2010

Training Objectives

- CFC Overview
- Your role in the campaign
- Giving options
- Making “the ask”

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CFC Overview

What is the CFC?

- President Kennedy initiated a formal national giving program for Federal employees in 1961. Since then, the Combined Federal Campaign (CFC) has evolved into the nation's leading workplace giving program.
- There are over 200 CFC campaigns, broken down by geographical location.
- The Combined Federal Campaign of the National Capital Area (CFCNCA) is the largest CFC raising over \$67 million in the 2010 campaign.

Why Donate through the CFCNCA?

- **Choice**

- The CFCNCA offers over 4000 local, national and international charities that are vetted by federal employees.

- **Ease**

- Giving through the CFCNCA allows donors to give online and through payroll deduction.

- **More Money for the Charities**

- Giving through the CFCNCA allows more of each pledge to go directly to the charities reducing their administrative costs.
- CFCNCA donations to charities are undesignated, meaning charities aren't limited on how they can use the money.

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Roles and Responsibilities

Your Role as a Keyworker

- **Ensure 100% opportunity to give** with all employees
- **Encourage employees to give through e-Giving** and use the resources on CFCNCA's website
- **Increase number of donors** and amount of gifts
- **Protect donor information**

Elevator Speech

- The Elevator Speech is a tool that delivers a message to an audience, usually one or two persons, for the purpose of engaging their interest in pursuit of a particular goal.
 - Concise
 - Focused
 - Compelling
 - Inspiring
 - Brief (no more than 30-60 seconds)
 - Provides follow-up

Making “the Ask”

- **Learn about the campaign** - Become familiar with the CFCNCA so that you can explain why giving through the campaign is effective and easy
- **Make your own gift before asking others to give** -Your pledge demonstrates you believe in what you are doing
- **Make the ask in person** - Personal contact gives you the chance to tell an inspirational story and to individualize the campaign. The ask should be made during duty hours.
- **Encourage payroll deduction** - Explain how this approach spreads giving out over the year and makes it possible to make a more generous gift

Making “the Ask”

- **Explain how to make a pledge online** - Tell donors they can help reduce campaign costs to direct more funds to charities via e-Giving
- **Encourage employees to contribute to charities that support the causes they care about**

Regulatory Requirements

- **Per OPM regulations, CFCNCA cannot:**
 - ❑ Require 100% participation
 - ❑ Allow managers to solicit subordinates
 - ❑ Pressure colleagues to give specific amounts
 - ❑ Develop a list of non-contributors or contributors
 - ❑ Coerce fellow employees

Every donor has the right to make a confidential pledge.

2011 CFCNCA

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- Campaign Goals
 - \$67.2 Million
 - 38.6% Participation
 - Increase the use of e-Giving

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Giving Options

Types of Pledges

- Payroll deduction
 - Recurring gifts that are spread across a year, deducted each pay period
 - Can be made through paper Pledge Forms, or paperless deductions (paperless deductions not available in all agencies)
- Credit/Debit Card
 - One-time pledge or monthly recurring pledge
 - e-Giving pledge

Pledge Type

- Electronic Check
 - ❑ One time donation
 - ❑ e-giving pledge
- Cash or Check
 - ❑ One time donation
 - ❑ Traditional paper Pledge Form

Pledge Type

- Designated
 - Use the 5-digit charity code to select an approved charity
- Undesignated
 - Donations without a charity selected
 - Distributions made in the same proportion as charities receiving designations

e-Giving

- Provides a simple and secure option for giving
- Reduces costs and increases the money going directly to charities
- Is available 24/7 from work or home

e-Giving Methods

- Paperless Payroll
 - Includes Employee Express (EEX) and CFCNCA e-Giving Paperless Payroll Deduction
 - Not available to all agencies
 - **No paperwork for donor or Keyworker**
 - Best for donors who don't want any paperwork and want to keep information confidential

e-Giving Methods

- Credit Card/Debit Card/e-check
 - Donations can be made monthly(credit/debit only), or one time
 - **No paperwork for donor or keyworker**
 - Best for donors who don't want paperwork or want to keep donation confidential
- Online Printed Pledge
 - Payroll deduction or one time cash/check donation
 - **Donors must turn in printed Pledge Form**
 - Best for donors who want a hard copy record of donation and ability to look up donation record online

Online Charity Search

- Select charities of choice from CFCNCA's comprehensive list of more than 4,000 approved organizations
 - Searchable online database
 - Sort by name, keyword, location, administrative overhead rate, CFC code number or service category (e.g., health, disaster relief, education)
 - Accessible 24/7 at www.cfcnca.org

Pledge Form Carrier (Form 100)

CFCNCA Pledge Form Carrier
(Form 100)

750 17th Street, NW, Suite 200, Washington, DC 20006
Telephone: 202-465-7200

STAPLE ANY CONFIDENTIAL GIFT ENVELOPES HERE

KEYWORKER'S SUMMARY

TO:
Campaign/Unit Coordinator _____ Phone (____) _____


Department/Agency/Bureau _____

FROM:
Keyworker _____ Phone (____) _____

Office/Division/Branch/Section _____

CFC Reporting Number Date _____

	NUMBER of Gifts	CFCNCA Auditor Use Only	AMOUNT	CFCNCA Auditor Use Only
Gifts by Payroll Deduction	_____		\$ _____	
Gifts by Cash / Check	_____		\$ _____	
Number of Confidential Gifts <small>(DO NOT open confidential gift envelopes)</small>	_____		DO NOT OPEN Confidential Gift Envelopes	
Special Events Proceeds	_____		\$ _____	
TOTAL	_____		\$ _____	
Number of Special Event Donors	_____	Do not write in shaded areas.		
Number of EAGLE AWARD Contributions	_____			
Number of DOUBLE EAGLE AWARD Contributions	_____			



INSTRUCTIONS FOR KEYWORKER'S SUMMARY

- Use the information from the WHITE copies of the pledge forms to tally your results above.
- Photocopy your completed *Keyworker's Summary* for your records.
- Staple any confidential gifts in their own sealed envelopes to the top right-hand corner of this envelope.
- Limit the number of pledge forms in each envelope to 10. See instructions on reverse for inserting pledge forms into pockets.
- If necessary, account for any contributions collected at special events by completing the Special Events Proceeds Form. Insert the completed form clipped to the event funds.
- SEAL THIS ENVELOPE.**
- Give the *Pledge Form Carrier* to your Campaign/Unit Coordinator.

Thank you for volunteering your time to help others.
If you have any questions,
please contact your Campaign/Unit Coordinator.
Store securely to protect personal information.

WHITE COPIES ONLY

YELLOW COPIES ONLY

WHITE COPIES ONLY

FROM PLEDGE FORMS ARE INSERTED INTO THIS POCKET
CONFIDENTIAL GIFTS, IN THEIR OWN SEALED ENVELOPES,
REMAIN STAPLED TO THIS POCKET.
ALWAYS STORE PLEDGE INFORMATION SECURELY.

STEPS

- Remove the **WHITE copy from each pledge form**. The **WHITE** copy is the "official" copy used for auditing purposes.
- Use the information from the **WHITE** copies to tally your results on the *Keyworker's Summary* (see other side of this *Pledge Form Carrier*).
- Attach the contributor's cash or check to the **WHITE** copy of the contributor's pledge form.
- Do not** consolidate the cash/checks into one personal check.
- Insert the WHITE copy from each pledge form into this pocket** whether the contribution is by payroll deduction or cash/check. Limit the number of pledge forms in each pocket to 10.

Proceed to Step 6 below.

YELLOW COPIES ONLY

FROM PLEDGE FORMS ARE INSERTED INTO THIS POCKET
DO NOT PUT CHECKS OR CASH IN THIS POCKET!

STEPS (continued)

- Make sure that each **YELLOW** copy has been **signed by the contributor** to authorize your agency's payroll office to make the deductions specified. If a contributor is making a contribution by check or cash, a signature is not needed.
- Remove the **YELLOW** copy from each pledge form. **If a cash or check gift is made, return the YELLOW copy, along with the blue receipt copy, to the contributor.**
- Verify that each **YELLOW** copy included in this pocket is for a payroll deduction pledge before you insert it into this pocket.
- Give this Pledge Form Carrier to your Campaign/Unit Coordinator when it is ready. This pocket will be detached by your Team Captain or Coordinator and sent to your department's or agency's payroll or finance office. **Payroll copies always remain in your agency's payroll office.**
- Give the BLUE copy of each pledge form to the appropriate contributor** and thank them on behalf of CFCNCA and all those who will benefit from their gift.
- Discard the pledge form covers.

WHITE COPIES ONLY

YELLOW COPIES ONLY

CFC 100 (7/2011)

Processing Pledges

- Do not accept **out of area** Pledge Forms
- Keep completed Pledge Forms **secure**
- Make sure the Keyworker Summary on Pledge Form Carrier (Form 100) has been filled in correctly
- Turn in results **promptly** to a Campaign Coordinator
- Ensure the **chain of custody** of CFCNCA deposits

Processing Pledges

- Avoid **misrouting** yellow Pledge Forms
 - ❑ Place them only in the yellow section of the Pledge Form Carrier (Form 100)
- Ensure Pledge Forms from donors are filled out completely and correctly. Common mistakes to look out for include:
 - ❑ Missing authorization signature for payroll deduction pledges
 - ❑ Cash or checks not included with completed Pledge Forms
 - ❑ Missing CFCNCA reporting unit number
 - ❑ Pay period deduction amount not matching total annual deduction amount

Processing Pledges

- Make sure Pledge Forms are legible, and pledge amounts are correctly calculated
- If donors choose to release their information to charities, ensure name and contact info is completely filled out
- To process a **confidential gift**
 - Receive completed Pledge Form with cash, check or payroll deduction copy
 - Place all items in sealed, white envelope
 - Write reporting number on the front of the envelope

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Engaging Your Colleagues

Keyworker Kit

- Pledge Form
- Pledge Form Carrier (Form 100)
- Campaign Card
- 10 Tip Volunteer Card
- Keyworker Guide
- Volunteer Gift and Button



Posters (Featuring stories of beneficiaries)

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**BECAUSE
I CAN MOVE
FORWARD.**

2011 Combined Federal Campaign
of the National Capital Area

**Hope is the
greatest gift
of all.**

Serving in Iraq, I was wounded in the line of duty and hospitalized. Through a CFCNCA-supported charity I received full rehabilitation services, from daily physical therapy sessions to patient care packages. Now I am back on my feet and I continue to serve with a smile.

Make your pledge today, go to www.cfcnca.org.

COMPASSION
OF INDIVIDUALS
POWER
OF COMMUNITY



**BECAUSE
MY MOM'S
CANCER WAS
CURED.**

**Hope is the
greatest gift
of all.**

But I must explain to you how all this mistaken idea of denouncing pleasure and praising pain was born and I will give you a complete account of the system, and expound the actual teachings of the great explorer of the truth, the master-builder of human happiness.

www.cfcnca.org/because

COMPASSION
OF INDIVIDUALS
POWER
OF COMMUNITY



Campaign Card

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As Federal workers, we represent a powerful, caring community through the Combined Federal Campaign of the National Capital Area (CFCNCA). We are dedicated to making a difference in local communities, across the nation and around the world.

HERE'S HOW YOU CAN MAKE A DIFFERENCE:

1. Explore

Watch videos and read inspirational stories about how people have been helped through the CFCNCA. Learn how your dollars make a difference.

2. Search

Browse the CFCNCA list of more than 4,000 pre-screened and approved charities. Choose the charities that mean the most to you.

3. Donate

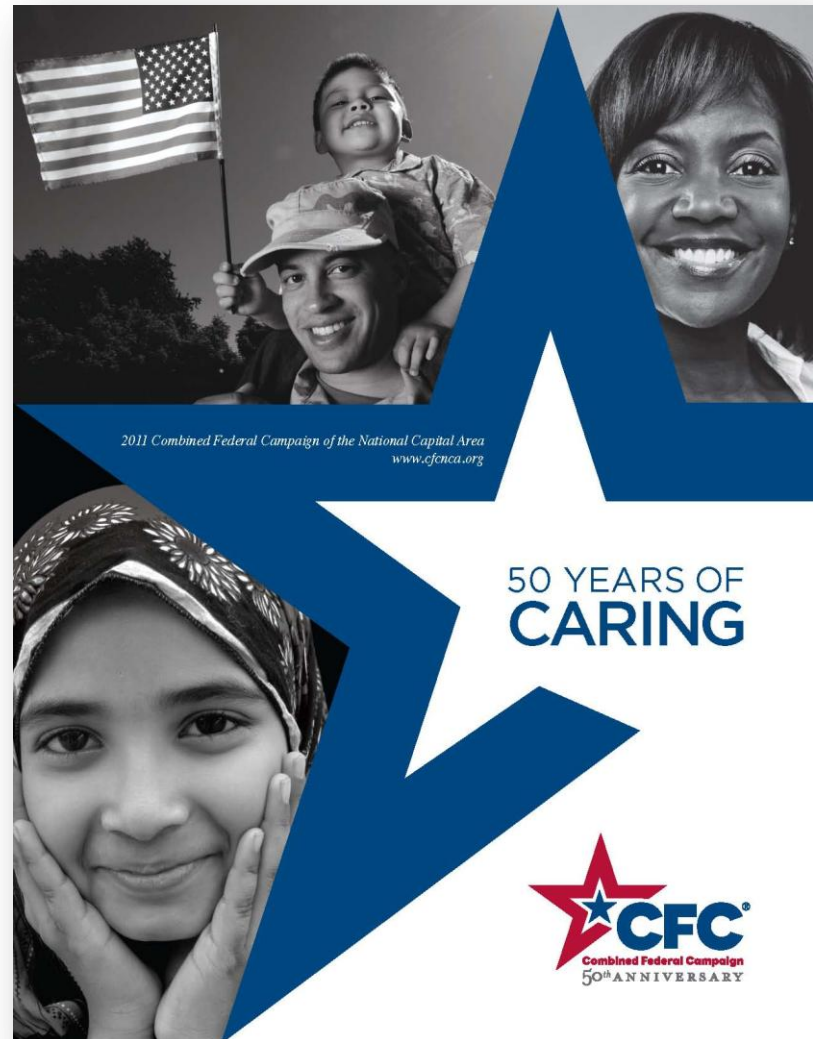
Pledge via e-Giving. You can donate through payroll deduction, credit/debit card, electronic check, cash or check.

- Distribute with Pledge Form, as reminders and at campaign events

Catalog Cover

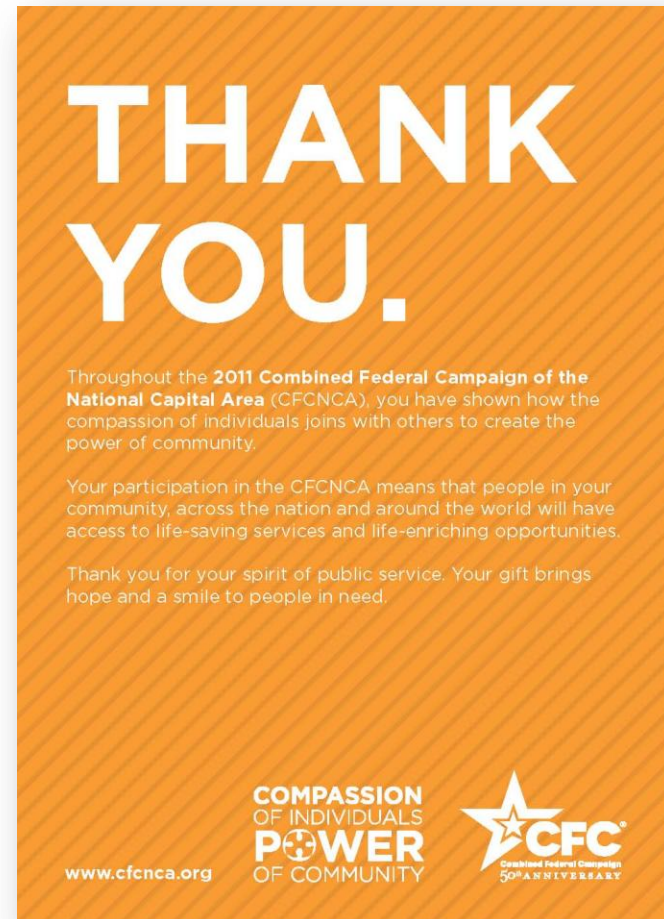
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- Available in printed version, as a PDF or as a searchable database at www.cfcnca.org



Donor Recognition

- Thank You Card
- Donor Sticker
- Eagle Pins



CFCNCA Online- www.cfcnca.org

- e-Giving
- Inspirational stories from Federal employees
- Event information, news and photos on Facebook GovLoop and Twitter
- Marketing resources available for download
- Campaign video and PSAs with inspirational stories from Federal co-workers
- Campaign tips and ideas
- Registration for all volunteers
- Volunteer and Donor Surveys

Register as a Volunteer

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Stay up to date

Register to receive tools and resources,
tips and best practices and invites to webinars at
www.cfcnca.org