

2011

KEYWORKER GUIDE

**ROLES AND RESPONSIBILITIES OF
THE CAMPAIGN COORDINATORS AND
KEYWORKERS**



**COMPASSION
OF INDIVIDUALS
POWER
OF COMMUNITY**

2011 Combined Federal Campaign of the National Capital Area



www.cfcnca.org

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INTRODUCTION

Welcome to the Combined Federal Campaign of the National Capital Area (CFCNCA) for 2011. Thank you for serving as a Keyworker for your department or agency. You are taking on a valuable role with a powerful community of caring that raises millions of dollars to help people in need each year. The work you do is critical to the success of this effort.

The 2010 CFCNCA campaign raised \$67 million to support charities that provide life-enriching and life-saving programs for people and communities in need. This response from the Federal workforce demonstrates the spirit and support of our Federal employees.

This guide outlines your responsibilities and offers tips on making the 2011 campaign another record-breaking year of giving. As you plan your campaign, work with your Campaign Managers and solicit your co-workers, remember that your efforts will bring help and hope to millions of people. This year we will celebrate the 50th Anniversary of the campaign, and together, we will make a difference in our local communities, across the nation and around the world.

Thank you for your service.

REGISTER AS A KEYWORKER

at www.cfcnca.org to receive tools and resources such as tips and best practices, invitations to webinars and ongoing information throughout the campaign season.

JOIN THE ONLINE COMMUNITY

at GovLoop, Facebook and Twitter to share inspirational stories, tips and best practices with other volunteers.

CAMPAIGN ROLES

- **Local Federal Coordinating Committee (LFCC):** Federal leader volunteers who provide regulatory oversight of the campaign
- **Campaign Chair:** Head of the department or agency who supports the campaign by participating in special events, approving campaign goals and providing the resources necessary to run an effective campaign
- **Campaign Vice Chair:** Senior staff member appointed by the Campaign Chair to help make decisions, secure the support of the entire senior management team and participate in campaign events
- **Loaned Executive (LE):** Federal employee volunteer who works full-time with the CFCNCA staff for approximately six months to support campaigns in his/her assigned accounts
- **Campaign Manager (CM):** Federal employee volunteer responsible for coordinating and leading the campaign committee and informing senior management of progress
- **Campaign Coordinator:** Federal employee volunteer responsible for recruiting Keyworkers and ordering and distributing campaign supplies
- **Keyworker:** Federal employee volunteer responsible for making “the ask”

KEY CAMPAIGN DATES TO REMEMBER:

9/1/11 Official campaign kickoff	2011
9/21/11 Lend a Hand Happy Hour	
10/12/11 Lend a Hand Happy Hour	
11/16/11 Lend a Hand Happy Hour	
11/29/11 Countdown to end of campaign	
12/5/11 Campaign contest begins	
12/15/11 Final day to solicit pledges	
01/20/12 Deadline for contest submissions	2012
03/06/12 Campaign Finale Celebration	

I AM A KEYWORKER, WHAT SHOULD I DO NEXT?

1. **Make your own pledge** to the CFCNCA so you know the process and can proudly say, "I gave too!"
2. **Attend training sessions** to learn about best practices and guidelines for asking your co-workers to make a pledge and to learn about the reporting tools you will need to process pledges.
3. **Ask your assigned co-workers** to donate through the CFCNCA.
4. **Be prepared to explain** the benefits of donating through the CFCNCA.
5. **Process Paper Pledges and fill out the Pledge Form Carrier (Form 100).** Deliver all of the paperwork to your Campaign Coordinator promptly, at least once per week. *(For detailed information on pledge processing, see page 10 of this guide.)*
6. **Keep donor personal information safe** prior to giving the Pledge Forms to your designated volunteer by putting the completed forms in a secure location such as a locked drawer, cabinet or closet. Protect donors' personal information as if it were your own.
7. **Thank each employee** who donated through the CFCNCA. Use the donor Thank You Cards, donor stickers and Eagle Award pins.

2011 CATALOG OF CARING

The CFCNCA continues to print the *2011 Catalog of Caring* for donors who cannot access the online version at www.cfcnca.org. We make a limited number of printed catalogs available to Keyworkers for distribution upon request.

By having a limited number of printed catalogs, we cut overhead costs and maximize the funds that can go directly to charities. We are also responding to donor requests to put more information online to conserve environmental resources.

WHAT DO I NEED TO KNOW BEFORE I MAKE “THE ASK?”

- 1. Learn about the campaign.** Become familiar with the CFCNCA so you can explain why giving through the campaign is effective and efficient. Understand how to research and select charities at www.cfcnca.org and through the printed *2011 Catalog of Caring*.
- 2. Attend training.** The session includes best practices on how to make “the ask” and how to report the donations you will receive. Training tools are available online at www.cfcnca.org. By registering as a volunteer, you have access to upcoming training webinars.
- 3. Make your own gift before asking others to give.** You will discover that making your donation first makes it easier to ask others to follow your lead and to explain the process. Your pledge demonstrates that you believe in what you are doing.
- 4. Make “the ask” in person.** Personal contact gives you the chance to individualize the campaign for each person in order to answer specific questions and concerns they may have. Do not leave the Pledge Form on anyone’s desk or in a mailbox.
- 5. Talk from personal experience.** When you meet with potential donors share a story about someone who has been helped by a CFCNCA-supported charity or use one of the inspiring stories at www.cfcnca.org.

WHY GIVE THROUGH THE CFCNCA?

Tell your colleagues why giving through the CFCNCA is the smart way to give.


- **Quality choice.** This 2011 Catalog of Caring lists more than 4,000 approved charities. Whether your interest is in disaster relief, health, education or the arts, you can choose from thousands of charities approved by Federal employees. Go to www.cfcnca.org to search the online database of charities.
- **Giving made easy.** Simply donating through a regular payroll deduction distributes your giving throughout the year and adds up to a significant impact. Pledging through e-Giving makes it easier and more convenient to participate in the campaign.
- **Spirit of public service.** The Federal workforce embodies the spirit of compassion and public service. By giving through the CFCNCA you are going above and beyond your daily service to change the lives of those in need.

- 6. Encourage payroll deduction.** Explain how this approach disperses giving throughout the year and makes it possible to give a more generous gift. Let donors know that charities also receive funds monthly throughout the year and can plan programs and budgets more effectively.
- 7. Explain how to make a pledge through e-Giving.** Let contributors know that they can help reduce campaign costs and direct more funds to charities by pledging online.

HOW DO I TALK ABOUT THE CAMPAIGN?

When talking to Federal employees about the campaign consider using some of these talking points:

I hope you'll consider participating in the campaign this year. Last year, more than 134,000 Federal employees in our area raised \$67 million for thousands of local, national and international charities, and they're going to need our help more than ever. Use a personal story, if possible (e.g. "I feel lucky to have a job. My brother-in-law lost his job a couple of months ago and doesn't have health insurance. He and his family are getting help from one of the charities we support through the CFCNCA.")



There is no minimum amount to donate through the CFCNCA. Your gift can be spread out over the year, and if you choose, automatically deducted from your paycheck. Thousands of charities that serve people and communities in need every day depend upon our support each year.

The CFCNCA is the only annual workplace giving campaign for Federal employees. Donations go to a variety of organizations that help people and communities in need in DC, across the nation and around the world. We provide millions of dollars in support for worthy charities chosen by you, the donor.

As a community of Federal employees, we help many people who are in need. I feel proud of my participation. Last year, more than 134,000 Federal employees in our area pledged \$67 million to more than 4,000 charities. With your help, we'll reach our campaign goal of \$67.2 million this year. Charities depend on our support, and this year, they will need it more than ever.

Making a pledge is very easy. You can use our e-Giving options that include the online charity search, credit card/debit card/electronic check options or paperless payroll options (if applicable). You also have the option to fill out the traditional paper Pledge Form. Just provide me the white and yellow copies of the Pledge Form.

HOW CAN DONORS MAKE A PLEDGE?

HOW TO CHOOSE CHARITIES

Donors can search online and choose from more than 4,000 charities using the charity search tool at www.cfcnca.org or through the printed *2011 Catalog of Caring*. The online search tool allows donors to sort and select charities by name, keyword, locations, administrative overhead rate, CFC code number or service category.

GIVING OPTIONS

e-Giving

- **Paperless.** Donate via personal credit/debit card or electronic check directly from a bank account and choose a monthly or one-time gift.
- **Paperless Payroll.** If your department or agency is integrated with the CFCNCA's effective and easy paperless payroll option, or with Employee Express, choose this option to make your electronic gift through payroll deduction.

- **Online Printed Pledge.** For payroll deduction or cash/check gifts.

- Donors have all the convenience of the online charity search and can create an account to track their favorite charities.
- The Pledge Form is filled in automatically.
- The signed copy and the audit copy must be printed by the donor and given to the Keyworker to complete the donation.
- Donors print and keep the third copy as their receipt.

Traditional Paper Pledge Form

- The signed copy and the audit copy must be given to the Keyworker.
- Donors keep the third copy as their receipt.
- Keyworker places Pledge Forms into Pledge Form Carrier (Form 100) and gives it to their designated volunteer.

PAYMENT METHOD

CASH, CHECK	CREDIT CARD, DEBIT CARD, E-CHECK	PAYROLL DEDUCTION
<ul style="list-style-type: none"> • Traditional Paper Pledge • e-Giving Printed Pledge 	<ul style="list-style-type: none"> • e-Giving Pledge 	<ul style="list-style-type: none"> • Traditional Paper Pledge • e-Giving Printed Pledge • e-Giving Paperless Pledge* • Employee Express (EEX)*

* Not available within all agencies

Note: e-Giving pledges are made by going to "Donate Now" at www.cfcnca.org

HOW DO I PROCESS PAPER PLEDGES?

KEYWORKER INSTRUCTIONS*

1. Collect both the distributed Pledge Forms (either the e-Giving printed Pledge Form or the traditional paper Pledge Form) and any confidential gifts.
2. Check all Pledge Forms authorizing a payroll deduction to make sure that the donor signed the yellow copy and provided a Social Security Number (SSN) or Employee ID Number.
3. Ensure the donor used the 5-digit CFC charity code(s) if they want their donation to go to a specific charity(ies) and that the amount of the designations adds up to the total contribution amount.
4. Follow the instructions on the Pledge Form Carrier (Form 100) to separate the yellow, white and blue copies of the Pledge Forms. (See page 12 for more details.)
5. Discard the Pledge Form cover.
6. Return the Pledge Form to the contributor to correct and resubmit if any of these items are missing.

7. Use the information from the white copy Audits to tally your results on the Pledge Form Carrier. Place the white copies in the Pledge Form Carrier only after you write the totals under the Keyworker Summary of the Pledge Form Carrier. Do not open the sealed confidential gift envelopes.
 8. Photocopy the Keyworker Summary for your records.
 9. Once all forms are finalized, place items in the Pledge Form Carrier.
 10. Staple sealed envelopes with any confidential gifts on the upper right hand corner of the Pledge Form Carrier where indicated.
 11. Check that only cash, checks and the white copies of the Pledge Forms are in the white pocket of the Pledge Form Carrier and that only yellow or payroll copies of the Pledge Form are in the yellow pocket of the Pledge Form Carrier.
 12. Seal the Pledge Form Carrier.
 13. Give the sealed Pledge Form Carrier to your designated volunteer.
- * For paperless e-Giving donations, there is no action required of the Keyworker.

FORM COLOR	PLEDGE FORM INSTRUCTIONS
<p>Yellow copy Payroll Deduction NOTE: For e-Giving printed Pledge Forms, this copy is white.</p>	<p>For a payroll deduction to occur, the contributor must sign the yellow copy on the traditional Pledge Form to authorize your payroll office. If the donor has an e-Giving printed Pledge Form option this copy will be white.</p> <p>Check that the contributor has provided:</p> <ul style="list-style-type: none"> • SSN or Employee ID Number • 5-digit CFC charity codes • Accurately calculated and totaled pledge <p><i>Place the yellow copy in the yellow pocket of the Pledge Form Carrier (Form 100). If the donor has an e-Giving printed Pledge Form, the copy will be white.</i></p> <p>A donor signature, SSN or Employee ID Number is not needed on the Pledge Form for a cash or check donation. Return the yellow copy to the donor or shred it.</p>
<p>White copy Official CFCNCA Audit</p>	<p>Turn in a white copy for each gift, whether the contribution is by payroll deduction, cash or check option.</p> <p>If the contribution is by cash or check, paperclip the cash or check to the corresponding white copy. Do not consolidate cash gifts into one personal check.</p> <p>Use the white copies to tally your results and write them under the Keyworker's Summary on the Pledge Form Carrier (Form 100). Place the white copies from each Pledge Form in the white pocket of the Pledge Form Carrier (Form 100). You can put up to 10 white copies in the pocket.</p>
<p>Blue copy Donor Receipt NOTE: For e-Giving printed Pledge Forms, this copy is white.</p>	<p>Return the blue copy of the Pledge Form to the donor and thank him or her on behalf of the CFCNCA and all those who will benefit from the gift. The blue copy is part of the documentation donors need for tax purposes. If the donor has an e-Giving printed Pledge Form option, this copy will be white.</p>

HOW DOES THE CAMPAIGN RECOGNIZE GENEROSITY?

The efforts that departments, agencies, reporting units and volunteers make to ensure the success of the CFCNCA is central to the ability to help people around the world. The CFCNCA recognizes outstanding dedication and commitment with the following awards:

DEPARTMENT/AGENCY RECOGNITION

- **President's Award** for reporting units with 75 percent employee participation or \$275 per capita gift.
- **Chairman's Award** for reporting units with 67 percent employee participation or \$225 per capita gift.
- **Honor Award** for reporting units with 60 percent employee participation or \$175 per capita gift.
- **Merit Award** for reporting units with 50 percent employee participation or \$125 per capita gift.
- **Million Dollar Circle Award** for departments, reporting units or agencies that generate more than \$1 million in donations.

CELEBRATE 50 YEARS

Make a Public Service Announcement to celebrate the 50th Anniversary of the CFC. For more information about the PSA contest go to www.cfcnca.org.

- **Summit Award** for departments or agencies that achieve a 3 percent increase in total dollars raised over the previous year's campaign.
- **Participation Achievement Award** for departments or agencies that achieve a 2 percent increase in participation over the previous year's campaign.
- **e-Giving Award** for departments or agencies that have at least a 10 percent increase in paperless pledge donations between 2010 and 2011 campaign years - with a minimum of 10 paperless payroll donations.

VOLUNTEER RECOGNITION

- **Most Valuable Fundraiser** for CFCNCA Vice Chairs, Campaign Managers, Campaign Coordinators and other members of your CFCNCA team.
- **Special Service** for volunteers who have provided outstanding service to the campaign.
- **Certificate of Appreciation** for each Keyworker.
- **Outstanding Payroll Deduction Giving** for attaining an exemplary level of support for the CFCNCA with 75 percent or more of contributors making payroll deduction gifts.
- **100 Percent of Goal** for any reporting unit meeting or exceeding its campaign goal.

DONOR RECOGNITION

- Eagle Award Pins for donors who give 1 percent of their salary as Eagle givers or 2 percent as Double Eagle givers.
- Donor stickers and a personal thank you to all donors.

WHAT ARE COMMON QUESTIONS ABOUT THE CFCNCA?

Q: Why should I make charitable contributions through the CFCNCA when I could just send a check directly to the charities I wish to support?

A: By combining solicitations into a once-a-year, unified campaign, the CFCNCA reduces the need for individual and costly solicitations from charities. Accounting costs also are much lower because charitable gifts are consolidated into reliable, monthly checks to the charity, reducing processing costs. Additionally, many donors find it easier to contribute monthly, with funds coming directly from their paychecks, rather than sending a check directly to an organization they wish to support.

Q: If I don't designate a charity, what happens to my donation?

A: All "undesignated" donations are combined and then shared proportionally among all charities and federations that received designations. It is important to select and designate charities to ensure your gift goes where you want it to go. Use the online charity search at www.cfcnca.org to search and find charities that match your interests. It allows searching by keyword, location and other important factors to help you find charities efficiently.

Q: How efficient is the CFCNCA?

A: Through the oversight efforts of the Federal employees on the Local Federal Coordinating Committee (LFCC) and strategic management by the Principal Combined Fund Organization, Global Impact, 7 percent of the funds raised were spent on campaign expenses such as printing materials, training volunteers and auditing contributions in the previous year. In comparison, the national CFC average overhead cost is 10.4 percent. Because this cost is so low compared with other fundraising campaigns, every dollar you pledge goes a very long way toward helping others. By combining donations, administrative costs are cut and the value of each pledge is maximized. Online tools help reduce administrative costs and increase efficiencies even more.

Q: If I give by check, to whom should I make out the check?

A: CFCNCA.

Q: Is there a minimum or maximum payroll deduction gift one can donate through the CFCNCA?

A: The minimum gift for military and civilian personnel is \$1 per pay period. There is no maximum gift. All gifts are welcome.

NEED MORE INFORMATION OR ASSISTANCE?

Visit www.cfcnca.org or contact the CFCNCA staff and your assigned Loaned Executive at:

Combined Federal Campaign of the National Capital Area

750 17th Street, NW
Suite 200
Washington, DC 20006
202-465-7200 (phone)
202-465-7545 (fax)

During the campaign, you also can call CFCNCA Customer Support at 202-465-7230, Monday through Friday from 9:00 a.m. to 5:00 p.m., or e-mail customersupport@cfcnca.org.

Q: Why isn't my favorite charity in the catalog?

A: Participation in the CFCNCA is determined by either a local or national application process. Charities must apply in order to be included. It is possible that your favorite charity either has not applied or did not qualify. We suggest that you encourage the charity to apply next year. Check www.opm.gov/CFCNCA for the national procedures or www.cfcnca.org for local procedures.

Q: Will the charity get more money if I give directly?

A: In almost all cases, charities in the CFCNCA have much higher fundraising costs on their own than they experience when they are part of a campaign like the CFCNCA.

**HOPE IS THE GREATEST
GIFT OF ALL.**



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