

Combined Federal Campaign of the National Capital Area (CFCNCA)

Glossary of Terms

as of July 21, 2009

Account –Department/Agency participating in the Campaign.

Administrative and Fundraising Rate (AFR) – The AFR is commonly referred to as the “overhead” rate for a charity. The rate is published in the CFC charity list for donors to review. There is no ceiling on what an AFR must be for each charity. The philanthropic community generally considers an AFR in excess of 35% to be problematic and that potential CFC donors should carefully review the circumstances applicable to the potential charities of their choice to be certain that they fully understand and accept the AFR situations for such charities before donating to them.

Agency, Voluntary Agency or Charity - A non-profit, philanthropic, human health and welfare organization.

Associate Director – CFCNCA staff member who leads Loaned Executives as a team in their execution of the campaign activities within their assigned Accounts.

Audit — The term in the context of MANAGE reporting which signals the reported pledges by an Account match what was received by Campaign processing.

Average Gift – Derived from a Reporting Unit by dividing the total dollars pledged by the total number of contributors in the Reporting Unit.

Awards –Recognition tools (plaques and certificates) used to highlight various levels of Account (agency) Campaign accomplishment.

Campaign Awards Event - An event held by Accounts at the end of their Campaign period to celebrate success and present awards earned.

Campaign Committee – Led by a Campaign Manager in a large Account; made up of Campaign volunteers who serve as leads in finance, publicity, events, supplies, Keyworker training and other positions to run the various Campaign activities.

Campaign Coordinator – May serve as Deputy Campaign Manager; the Campaign Coordinator is usually an assistant who reports to a high level position who is serving as Campaign Manager and assists in running the campaign.

Campaign Period – The overall campaign-wide period is generally set at September 1 through December 15. More specifically, the length of the annual campaign within an Account is determined by the local campaign leadership. For example, if the campaign “kick-off” is set for October 1, the campaign can run to no later than December 15th. Actual dates are determined by the LFCC and PCFO and may vary from one campaign area to another.

Campaign Director – CFCNCA staff member who leads a team of CFCNCA Associate Directors and Loaned Executives in their execution of the campaign activities within their assigned Accounts.

Campaign Kickoff – An event held by the overall CFCNCA and by each participating Account to signify the beginning of the Campaign period.

Campaign Manager (CM) – Person appointed by an Account to plan and coordinate overall day-to-day Campaign activities within an agency (Account). CM works with LEs, Steering Committee, Unit Coordinators and Keyworkers in ensuring campaign success.

Campaign Manager Guide - A resource tool provided by CFCNCA to help assist the Campaign Manager with the set-up of a Campaign within an Account. The Guide is only one of means of communication with an Account.

Catalog of Caring – Annual official charity listing of CFCNCA for use by donors in order to select charities to which they wish to donate.

Charity Code – An assigned five digit code given to each charity. The assignment of new charity codes by OPM is part of the development of a centralized national CFC charity list. Donors will use the new charity code to designate their pledge. Charity Code is also known as the Designation Number.

Charity List – The official list of charities approved by OPM and the LFCC for inclusion in the CFC within a given geographic solicitation area. The Charity List will consist of three parts: the National/International part, the International part, and the Local part. Organizations that provide services, benefits, assistance, or program activities in 15 or more different states or a foreign country can choose to be listed on either the International or National/International part, except for members of a Federation, which must be listed with the Federation. Organizations that provide services, benefits, assistance, or program activities in 15 or more different states but no foreign countries will be listed on the National/International part. All qualifying local organizations within a CFC geographical solicitation area will be listed on the Local part associated with the campaign for that local CFC area. The CFCNCA Charity List in the final form is the Catalog of Caring.

Charity, Charitable Organization or Organization - A private, non-profit, philanthropic, human health and welfare organization.

Charity Fair –Event showcasing a sample of charities to increase campaign visibility within Accounts (agencies).

Combined Federal Campaign or Campaign or CFC - The charitable fund-raising program established and administered by the Director of OPM pursuant to Executive Order 12353, as amended by Executive Order 12404.

Combined Federal Campaign of the National Capital Area (CFCNCA) – One of over 290 Combined Federal Campaigns across the country which covers various geographic areas. CFCNCA service area includes the metropolitan Washington, DC, the Maryland and surrounding counties of Montgomery, Prince George’s, Calvert and Charles, and the Virginia counties of Arlington, Fairfax, Loudoun, and Prince William as well as Virginia cities of Alexandria, Falls Church, Fairfax, Manassas, and Manassas Park.

Confidential Donation –A pledge given by a donor that maintains the donor’s anonymity beyond the bank drop; the donor’s agency or Campaign volunteers are unable to know the donor’s name or amount pledged.

CFC Operations (CFCO) – The Office of Personnel Management division charged with overall responsibility for day to day management and supervision of the CFC. CFCO provides regulatory oversight, including annual audits, and technical guidance to the CFC campaigns.

Deposit Bag (Form 300) — The bag in which Pledge Form Carriers are gathered for deposit; used to transport donor pledges to official bank drops.

Designated Funds - Contributions which the donor has designated to a specific voluntary agency (ies), federation(s), or general option(s). Also see Undesignated Funds.

Designation Number –Numerical five digit code assigned to each charity which needs to be written on an employee’s Pledge Form to ensure donations are received by the intended organization. See Charity Code.

Director - The Director of the Office of Personnel Management.

Donor – Federal employee participating in the CFC by completing a CFC pledge form and designating their cash, check or payroll deductions donations to charities listed in the Catalog of Caring.

e-Giving tools – Overall reference to online solutions for donors to my a CFC pledge.

Employee - Any person employed by the Government of the United States or any branch, unit, or instrumentality thereof, including persons in the civil service, uniformed service, Foreign Service, and the postal service.

Employee Express (EEX) – OPM on-line CFC paperless pledge system used by certain Federal agencies.

Employer Identification Number (EIN) – The Internal Revenue Service (IRS) assigns a nine-digit number to employers, sole proprietors, corporations, partnerships, nonprofit organizations (charities), Trusts, Estates of decedents, government agencies, certain individuals, and other business entities. The IRS requires the number to identify taxpayers that are required to file various business tax returns.

e-pledge – a paperless method of making a CFC donation by credit card or debit transaction.

Expenses - All documented charges incurred identified in the PCFO application relating to the conduct of a local CFC and approved by the LFCC in accordance with these regulations.

Federation or Federated Group - A group of voluntary charitable human health and welfare agencies organized for purposes of supplying common fund-raising, administrative, and management services to its constituent members.

Form 100 (Pledge Form Carrier) — The envelope in which completed Pledge Forms are gathered for reporting in MANAGE.

Form 150 (Special Events Proceeds Form) Used by Account Campaign volunteers to report cash and checks collected through conducting of a fund raising event(s) during the Campaign. One copy is placed in a Form 100 with the collected proceeds and another copy is maintained with the Account’s Campaign records.

Form 200 (Deposit Form) – Created in MANAGE after entering data from the Pledge Form Carriers with two copies printed. One copy goes in the back pocket of the Deposit Bag and the second copy is used a receipt to be date-stamped by the representative at an official bank drop location; date-stamped copy is maintained by each Account.

Form 300 — See Deposit Bag.

Form 400 – Pledge Form Return Package used by PCFO pledge processing to return misdirected completed Yellow payroll deduction pledge forms and Confidential gift pledge forms to the appropriate Account’s payroll office.

FTE –Full Time Equivalent; Number of full time permanent employees in an Account.

Gift – Donation made by donor to CFCNCA by pledge, check or cash.

Goal – Total amount targeted pledge amount for each Account in this year’s campaign; each Reporting Unit will be assigned a goal which will create the Account’s overall goal.

Help Desk – CFCNCA technical MANAGE support and deposit assistant.

International General Designation Option - a donor option indicating that the gift be distributed to all of the international agencies listed in the international section of the campaign charity list in the same proportion as all of the international agencies received designation in the local CFC. This option will have the code IIII.

Keyworker - Federal employees who are generally responsible for distributing campaign materials, such as Catalog of Caring (charity list) and pledge forms within their agency or unit/division. Keyworkers also collect completed pledge forms and cash/check/money order donations from contributors, and transmit these items back to either the Campaign Coordinator or Unit Coordinator. The process varies in each Account.

Keyworker Kit - A package of CFCNCA forms and information presented to each Keyworker during Keyworker Training and generally includes the Charity List (Catalog of Caring), pledge form, pledge form carrier, thank you note, desk sign and Volunteer Handbook.

Loaned Executive (LE) - Federal employees "loaned" by a Federal agency to either the LFCC or PCFO to assist in the conduct of the campaign. LE responsibilities vary in each Campaign. Responsibilities may include pre-screening charity applications, and assisting Federal agencies in conducting solicitations of its employees, planning special events, giving speeches, coaching Campaign Managers.

Local Federal Coordinating Committee (LFCC) - The Local Federal Coordinating Committee (LFCC) is comprised of Federal employees that are officially designated by the Director to conduct the CFC in a particular community. The LFCC selects the Principal Combined Fund Organization (PCFO) that serves as fiscal agency for the campaign. The LFCC provides oversight for the local campaign in conformance with the CFC regulations and the policies established by OPM. The LFCC also approves local (and in some instances, statewide) charities in their Campaign area that have met CFC eligibility standards as set forth in the CFC regulations. Federal employees interested in volunteering with the CFC should contact their local LFCC found at the [Campaign Locator](#) or ask your duty-station Agency CFC Coordinator for more information.

MANAGE — CFCNCA's computer-assisted campaign management tool that allows for pledge reporting and real-time tracking of campaign progress, and a host of other helpful features. (See *User Manual* on the Quick Links drop down on the front page of MANAGE)

Office of Personnel Management (OPM) – OPM is responsible for the oversight of the CFC. The Director of OPM has designated to the CFCO responsibility for day-to-day management of the CFC. CFCO reviews and provides guidance and technical advice on regulations, and has the authority to conduct compliance audits on any CFC local campaign's fiscal records.

Official Deposit Drop – Official designated location where completed Deposit Bags are taken.

Online Charity Search – A method for CFC donors to conduct online search of thousands of charities participating in annual Campaign (stand-alone option or leads into the other e-Giving tools).

Online Pledge Assistant – Online method of preparing CFC pledge form, (payroll deduction, check or cash); prepared pledge form needs to be printed and submitted to Keyworker.

Open Deposits - A deposit that has been entered into MANAGE but has not yet been marked “received” by the CFCNCA audit department.

Open Deposit Report – MANAGE automatically sends a weekly report to Associate Directors, Loaned Executives and Campaign Managers that lists all the deposits under the email recipient that have been open for 17 days or more. This report can also be generated at any time by clicking on the Deposit drop down and selecting the Open Deposit tab.

Overseas Area - The Department of Defense (DoD) Overseas Campaign which includes all areas other than those included in the domestic area.

Participation Rate – Percent of employees from an account’s Reporting Units that donated during the Campaign.

Payroll Deduction – Donation amount withdrawn from an employee’s paycheck as directed by the employee on their Pledge Form.

Permissions — Allow or deny user access to different parts and functions of the CFCNCA MANAGE system.

Per Capita Gift – Per capita gift is derived from a reporting unit by dividing the total dollars pledged by the total number of employees in the Reporting Unit. The result is the per capita gift.

Personally Identifiable Information -- (PII) --- Information that can be used to discern or trace a person’s identity such as the donor’s social security number, and address that must be protected by campaign volunteers as they work and assist with the processing of donor pledge forms.

Pledge –Amount employee designates to a charity each pay period.

Pledge Form — An official donation designations form which contains donation information for a single employee.

Pledge Form Process – The movement of CFC donor’s completed pledge form from the donor to the PCFO’s pledge processing unit; also refers to the movement of completed pledge forms by various Campaign stakeholders – Keyworker, Unit Coordinator, Campaign Manager, MANAGE Users, Bank Drop, and PCFO pledge processing.

Potential Donors –Total number of employees in a reporting unit (FTE).

Principal Combined Fund Organization (PCFO) – The organization that administers the local campaign and acts as fiscal agent under the direction and control of the LFCC and the Director. OPM sets strict requirements for this role. Annual audits are required of the PCFO by an independent CPA. Global Impact serves as the PCFO for CFCNCA.

Reported Pledges — Totals unless specifically referred to as "audited", all data reported to MANAGE is the "raw" data as it has been entered by the Accounts who use MANAGE.

Reporting Unit Numbers –Unique numbering system assigned by CFCNCA to each sub agency of each Account to track donor pledges.

Reporting Unit - A government office that gathers and reports CFC donations. The end of a Campaign/Government Structure "tree branch", this is the lowest level of reporting in MANAGE.

Solicitations - Any action requesting money, either by cash, check or payroll deduction, on behalf of charitable organizations.

Team –Group of Loaned Executives organized by a Campaign Director or Associate Director (Team Leader) from CFCNCA.

Undesignated Funds - Contributions that the donor has not designated to a specific voluntary agency (ies), federation. Undesignated funds are distributed to all agencies participating in a campaign in the same proportion as are designated funds.

Unit Coordinator – Person appointed by Account to oversee activities within a Reporting Unit; also may have Keyworkers reporting to this person, who in turn reviews collected pledge forms and turns them into the Account Campaign Manager (Committee).

User Group — Allows MANAGE system access permissions to be granted or revoked to groups of users instead of individuals, making system administration more efficient.

Voluntary Campaign Management Office (VCMO) – Office of the Department of Defense that coordinates CFC activities; this office works in conjunction with CFCNCA.

Volunteer Handbook – Presented to Keyworkers and Campaign/Unit Coordinators as part of the Keyworker Kit; outlines the approach to the donor and how to handle pledge form process.