

# Indiana, Kentucky, & Southwestern Ohio Combined Federal Campaign

## 2016 Coordinator & Keyworker Training Guide



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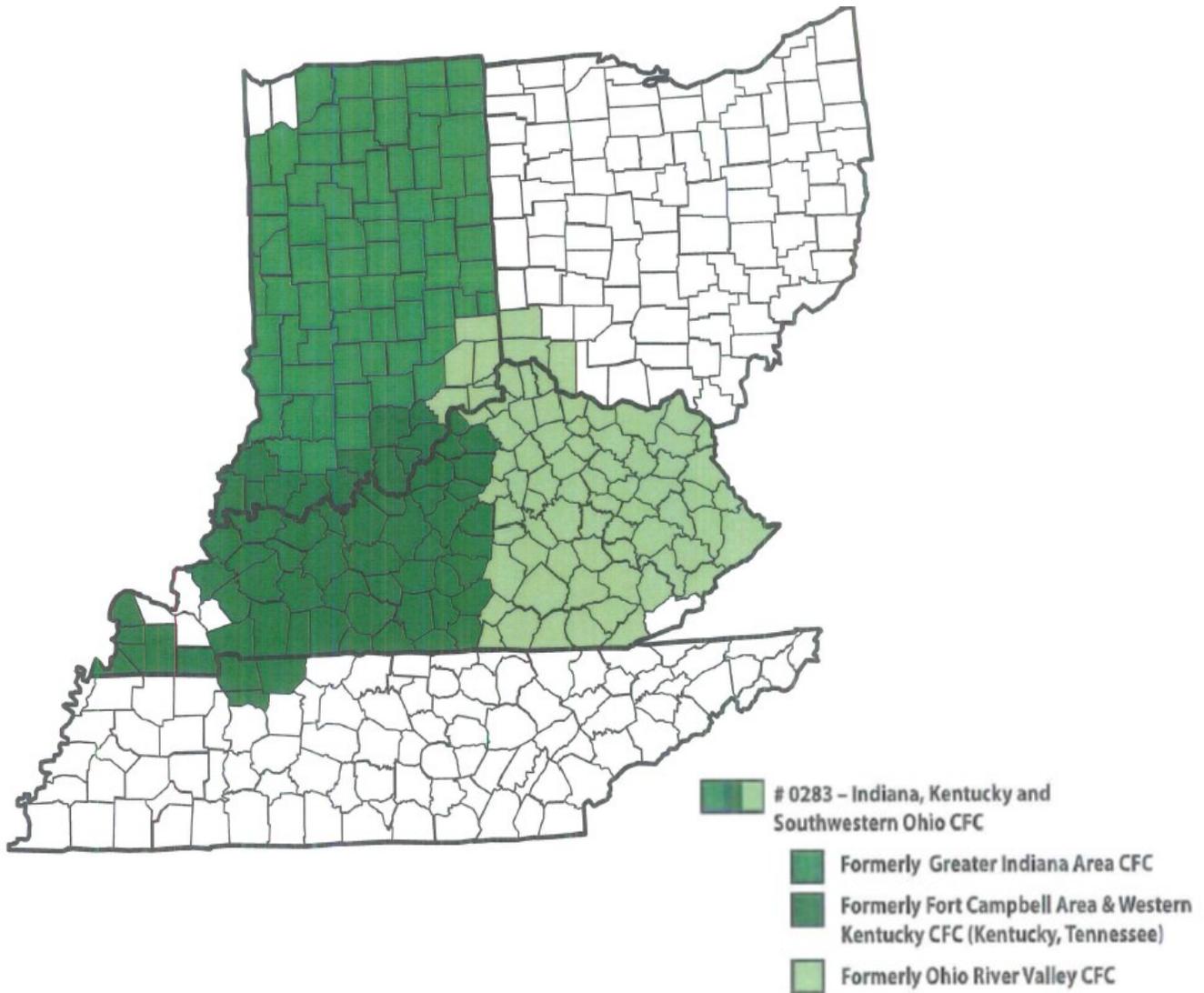
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# Campaign Merger

Indiana, Kentucky & Southwestern Ohio CFC added a few additional counties that were not part of an existing CFC.



## How does this effect you?

From an agency stand point you will continue to run your campaigns like you have in past years. No major changes impact the donor.

## Benefits

Growing our campaign helps reduce overhead costs—meaning more of your donation is going to the charities that you choose to support through the CFC.

# 2016 Campaign Information

**Theme :** #ShowSomeLoveCFC

**Campaign Dates:** September 12 through December 9

## Campaign Resources:

- [www.givecfc.org](http://www.givecfc.org)
- Tri-fold Brochure and Post Cards (select offices)
- Directories or Giving Guides
- Posters and Goal Thermometers
- Charity Speakers & Charity Fairs
- CFC Videos from Website

## Contact Information

**Phone:** 513-684-2515

**Email:** [orvcfc@gmail.com](mailto:orvcfc@gmail.com)

### Address

Indiana, Kentucky & Southwestern Ohio CFC

550 Main Street, Room 1-116

Cincinnati, OH 45202

## **What is the Combined Federal Campaign (CFC)?**

The Combined Federal Campaign is the only authorized solicitation of Federal employees in their workplace on behalf of approved charitable organizations.

Participation is strictly voluntary.

### **Why Give through the CFC?**

Federal employees work together every day to serve the public in a wide variety of ways; giving together to charities through the CFC is a natural extension of this spirit of serving.

#### **Choice.**

- You choose which charities receive your gift
- You have over 22,000 charities which you may support through the CFC, encompassing every type of cause or mission possible.
- You choose how much you want to give and how you want to give; by cash, check, credit card or payroll allotment.

#### **Convenience.**

- You may support all of your favorite charities at once rather than individually supporting each charity.
- Giving via payroll deduction allows you to spread your gift over the course of the year, allowing you to give more generously.

#### **Confidence.**

- The CFC is a safe and proven program. It's been around for more than 50 years.
- CFC results are audited by a local independent CPA firm to ensure contributions are forwarded to the charities as directed by donors and to ensure the campaign is fiscally responsible.
- All charities participating in the campaign are screened by federal employees to ensure they meet the high standards of the CFC.

#### **Care.**

- Your gift improves the quality of life for you and your neighbors in your community, your state, across the country and around the world.
- Federal employees in the Ohio River Valley contributed over \$900,000 to charity in 2014. Federal employees across the country and around the world contributed \$193 million to thousands of charities.

# Every Dollar Makes a Difference



## **\$1 a week provides . . .**

- 12 elementary school students with trained volunteer tutors to help with reading and math
- 10 children with bilingual beginning-to-read books to build early literacy skills
- Three 30-minute appointments for health assessment and counseling for individuals facing physical, developmental or mental health challenges
- one acre of unprotected tropical rainforest which assures protection of the natural areas vital to our climate and diverse species
- one hour of expert training for a citizen's group interested in preserving natural areas in their communities
- 1 hour of crisis management at a veteran's group specializing in PTSD
- Pet supplies for a local animal charity for feeding, cleaning, and medical assistance for adoptable pets for two weeks
- 10 parking vouchers (not covered by insurance) for a cancer patient traveling to a clinic
- Purchase cat litter for an entire animal shelter
- One wig for a child with cancer undergoing chemotherapy

**. . . that's \$52 a year**

## **\$5 a week provides . . .**

- two months of meals for a homebound person
- five wigs for children with cancer undergoing chemotherapy
- two nights of shelter for a troubled or neglected youth
- after school care (food, health, recreation, and homework help) for one child for a year
- clothing, shoes and a winter coat for one individual who has lost everything in a home fire
- temporary shelter for a family of four for three nights following a disaster, or shelter for 10 people for one night
- gas or power service for an elderly or disabled person who has been threatened with a utilities termination notice

**. . . that's \$260 a year**

## **\$10 a week provides . . .**

- A full month of groceries from the local food bank for a family of 4
- two days of care for a terminally ill individual
- baby formula for one low-income family for a whole year
- five and a half weeks of work training
- one month of preschool for a child at risk of falling through the cracks
- a lightweight wheelchair for a person who is physically challenged
- five people being treated for mental illness the opportunity to attend recovery classes that provide education, peer support, and healing strategies

**. . . that's \$520 a year**

# Role of Coordinators and Keyworkers

Your role as a CFC Coordinator or Keyworker is vital to the success of the campaign. The **most important responsibility** of each Coordinator or Keyworker is:

To make sure **EVERY** employee is **personally asked** to participate in the CFC—to give through the CFC to the charity(s) of his or her choice.

When **YOU educate** your fellow employees about the opportunities provided by the CFC and the benefits of giving through the CFC, more and more employees will choose to participate.

As long-standing supporters of the CFC have retired, less employees have prior knowledge of the CFC. Coordinators and Keyworkers now play an even bigger role in educating their coworkers about the CFC and marketing the campaign through emails and other means.

## Role of Technology

The Indiana, Kentucky, and Southwestern Ohio CFC is strongly encouraging all donors to give online in 2015. However, the role of online giving in the campaign does not diminish the need for a “**personal ask.**”

**The importance of face-to-face, personal touch between the Coordinator/Keyworker and the Federal employee cannot be understated. The personal ask remains the primary reason why Federal employees contribute through the CFC.** Giving online only facilitates the process - but it can never replace the importance of being personally asked.

# Responsibilities

## Keyworker's Key Responsibilities

Keyworkers assist Campaign Coordinators with the administration of the campaign.

- Attend Keyworker training and your agency's kickoff.
- Make the Personal Ask - Organize details of ask for group meetings.
- Encourage online giving and giving by payroll deduction.
- Distribute Campaign Materials. Distribute tri-fold brochure and post cards (where applicable), then a pledge form and campaign directory if necessary.
- Display posters and goal thermometers that advertise the campaign.
- Help donors access online pledging and complete pledge forms if necessary.
- Make sure pledge forms are filled out properly. Return them to the donor for any corrections.
- Collect pledge forms and cash/checks from donors and turn in weekly to Coordinator.
- Thank donors and present Eagle Club donor recognition gifts.

## Campaign Coordinator's Key Responsibilities

The Campaign Coordinator is the lead point of contact for all matters related to the CFC. He or she will plan, organize and implement an effective CFC campaign within that federal agency.

- Attend Coordinator training to gain knowledge about the campaign
- Develop a campaign plan (see [page 19](#) for more information)
- Obtain the support and involvement of both top management and labor
- Recruit and train an enthusiastic team of keyworkers who will help run a well organized and successful campaign. The CFC Loaned Executive can assist you with the training.
- Review the giving history of the agency and analyze last year's contributions.
- Establish campaign goals and time frames.
- Coordinate and plan employee meetings and special events.
- Schedule regular Keyworker meetings and times to turn in report envelopes.
- Identify and resolve campaign difficulties.
- Implement an effective system for processing pledge cards, downloading payroll copies if pledging through CFC Nexus and maintaining accurate records.
- Thank all employees who contributed and thank members of the campaign team.
- Request and distribute donor gifts.
- Evaluate the campaign and make recommendations for next year.

# CAMPAIGN TIMELINE CHECKLIST

## *Pre-campaign:*

- Attend training
- Set campaign goal
- Develop campaign strategy
- Campaign strategy developed, prospects identified, events scheduled
- Hold a keyworker meeting to discuss campaign plan
- Distribute campaign materials

## *During Campaign:*

- Campaign kickoff event
- Host employee education meetings
  - Utilize campaign team to conduct meetings for your areas within your agency
  - Distribute pledge forms and campaign materials during meetings
  - Present facts about the campaign
  - Schedule special events,
  - MAKE THE ASK!
  - Collect pledge forms and give a deadline for those who wish to discuss giving with their families
- Get employees excited about the campaign
  - Put up campaign posters and flyers
  - Promote the campaign goal and advertise progress
  - Conduct department/division/office events to raise awareness and increase participation
- Follow-up with employees to ensure 100 contact

## *Post-campaign:*

- Volunteer appreciation letter/event
- Distribute thank you notes to donors
- Calculate results
- Evaluate your organizations performance and determine campaign strengths and areas for improvement
- Make campaign recommendations for next year's lead campaign coordinator
- Ensure ALL payroll deduction copies of the pledge form and printed copies from CFC Nexus have been sent to the payroll office
- Post/announce final campaign results and thank donors.

# Quick tips

## **MAKE YOUR PLEDGE FIRST**

If your co-workers know that you believe in and support your agency's campaign, they are more likely to pledge. Be prepared to share your story about why you support the campaign, or how a charity has benefited you or someone you know.

## **KNOW THE FACTS**

Review the materials and websites thoroughly. This will help you feel more comfortable when you tell the story. Make personal contact—people give to people. It's important that every campaign volunteer reaches out to their assigned employees one-on-one.

## **BE POSITIVE**

Explain the benefits of giving to charity, Stress the importance of each person's contribution to our community and how every gift makes a difference!

## **ASK THE CO-WORKERS THAT YOU KNOW FIRST**

Approaching people you know will help you refine your presentation skills. The positive responses you get will boost your confidence.

## **MAKE IT A TWO-WAY STREET**

The ask should be a dialogue, not a monologue; be prepared for questions and comments. If you don't know the answer to a question, that's okay! Explain that you'll get back to the person posing the question after you've had a chance to get information. Also, be sure to listen with care and sensitivity to any concerns that com your way.

## **WHAT IS YOUR THING?**

Part of your dialogue should include asking the potential donor about their interest. Connect the dots between the donors interest and the work of the campaign.

## **SAY THANK YOU**

Whether your co-workers indicate that they will make a gift or not, thank them for their consideration. You can never say thank you enough!

# 8 steps to a successful campaign

## 1. ESTABLISH SUPPORT FROM THE TOP

The success of your campaign depends on the commitment and involvement of your top management and senior leadership. Keep them informed of the campaign progress.

### *Work with your management to...*

- Help determine campaign goals and objectives
- Set up a meeting with members of management before the campaign
- Endorse the campaign at all regularly-scheduled staff meetings
- Attend campaign events
- Provide thank you recognition to volunteers and donors

## 2. DEVELOP A PLAN

By looking at where you have been, you can better determine where you are going. Analyzing past campaigns will help reveal areas of opportunity and provide clues for improvement.

### *To build a solid campaign plan you'll need to...*

- Review your organizations giving history and analyze campaign data
- Establish a campaign timeline (campaign committee meeting dates, trainings, leadership giving campaign dates, campaign kickoff, employee meetings and special events)
- Implement strategies to meet your campaign goals

## 3. SET YOUR CAMPAIGN GOAL

Establishing a target serves as a motivator to achieve better results

### *Your campaign goal should be...*

- Based on past campaign results
- Realistic yet challenging
- Set for both dollars raised and percent participation

## 4. RECRUIT & TRAIN CAMPAIGN COMMITTEE/KEYWORKERS

Your campaign committee/keyworkers can help organize efforts to educate fellow employees about the campaign. They build excitement for the campaign, answer questions and ensure that everyone is asked to give.

### *To get the most from your volunteers...*

- Seek out co-workers with various skill sets that represent departments throughout the agency
- Find co-workers who support the campaign to serve on the committee

### *The Campaign Committee needs to...*

- Assist in campaign planning
- Have specifically assigned roles
- Review campaign plans and share new ideas

## **5. PROMOTE & PUBLICIZE**

Education and information are keys to reaching your campaign goals. Create an atmosphere of enthusiasm as you inform employees about how their contributions improve lives in our community.

### *Successful promotion strategies...*

- *Employee testimonials, campaign facts and articles (distributed via print, email or video)*
- *Endorsement letters from top management*
- *Kickoff events and contests*
- *Large and small group meetings (consider including speakers from charities)*
- *Posters and banners*
- *Incentives for turning in pledge forms*
- *Campaign brochures and pledge forms*

## **6. EDUCATE EMPLOYEES & MAKE THE ASK**

This is by far the most important step. The major reason people do not give is because they were never asked, so ask everyone! Giving is a personal decision—but please be sure to allow everyone the opportunity to contribute.

- *Educate through employee meetings within department/division workgroups*
- *Invite every employee*
- *Follow up with one-on-one conversation*

### *Your meeting should include...*

- *Management*
- *Charity speaker or employee who has a personal connection with the message fo the campaign*
- *Promotion of payroll deduction*
- *An opportunity to address donor concerns*

## **7. REPORT YOUR RESULTS**

Regular reporting allows the team to monitor progress of the campaign, while keeping you from having to hold cash, checks and pledge forms.

- *Develop and communicate a plan for team members or donors to return pledge forms*
- *Ensure the pledge for are filled out completely, signed and that the math is accurate*
- *Provide weekly progress reports to agency leadership and campaign team*
- *Ensure report envelope totals are accurate*
- *Report the final campaign totals to the entire agency*

## **8. SAY THANK YOU**

The importance of thanking everyone who helped you and to accomplish your goals cannot be over-emphasized.

- *Send personal thank you cards to the campaign team*
- *Have top management send an organization wise thank you and acknowledgement*
- *Have the campaign chairperson host a final thank you event for campaign volunteers and leadership*

# Universal Giving

Federal employees will now be able to make a “Universal Gift.” (UG) - give to any participating CFC charity no matter where the donor or the charity is geographically located.

Donors will be able to select from more than 22,000 local charities from areas outside of our campaign.

Donors may give to “universal charities” through any of the online giving systems: MyPay, Employee Express, or the online system at [www.givecfc.org](http://www.givecfc.org).

When donors search for their favorite charities:

Charities local to Indiana, Kentucky and Southwestern Ohio will be marked with a green heart icon

Charities that with an orange UG Symbol belong to charities outside of our campaign area

Use the “search options” to help narrow down the search results, including the option to “include UG charities.” In addition, donors may sort the search results by distance from a zip code.

## Online Giving Options

Federal employees have 3 means by which they may give online in 2015:

### **MyPay**

Employees paid through DFAS may log into MyPay and look for the Combined Federal Campaign option to pledge online.

### **Employee Express (EEX)**

Employees paid through the National Finance Center (NFC) may log in to EEX and look for the Combined Federal Campaign option to pledge online.

### **CFC Website at [www.givecfc.org](http://www.givecfc.org)**

All employees may give through CFC Nexus. Just go to the website and select “Pledge Online.” New donors will need to register and returning donors may log in. Donors may give by payroll or credit card.

# Online Giving

## MyPay (payroll only)

Here are the Federal Departments that may use MyPay to pledge online:

**Defense (National Guard, DCMA, DCAA, Recruiting Offices, etc.)**

**Veterans Affairs**

**Health & Human Services (NIOSH & FDA)**

**Very Important: MyPay doesn't automatically link donors to employers.** In order for Federal Agencies to receive proper credit, donors need to enter the 5-digit federal agency code under "Personal Information Authorized Release" and "Command/Unit Name" field. See your CFC Coordinator or Keyworker to obtain your federal agency code (5-digits). If you are unable to obtain your federal agency code, enter the agency's address.

**Personal Information Authorized Release**

Work Email Address:

OR

Work Phone Number:   
10 digits only (2224446666)

Command/Unit Name (Alphanumeric Field):   
Please enter your unit location or code provided by your campaign worker.

### Other caveats:

- Donors may not change or update pledges once they have been submitted.
- Sessions are limited to 30 minutes. All progress will be lost after the system times out.
- Donors can designate to a maximum of 30 charities.
- There is no paperwork associated with this pledge.

## Employee Express (EEX) (payroll only)

Here are the Federal Departments that may use EEX to pledge online:

**Transportation**

**Social Security**

**Interior**

**National Labor Relations Board**

**GSA**

**EEOC**

Steps to giving through EEX are very similar to giving through MyPay. Again there is no paperwork associated with this pledge.

**Note for Coordinators:** MyPay and EEX pledges are downloaded from each system every week and imported into CFC Nexus. Coordinators may view all pledges by going to [www.givecfc.org](http://www.givecfc.org) and selecting Campaign Results.

The CFC website at [www.givecfc.org](http://www.givecfc.org) contains a direct link to both MyPay and EEX.

# Online Giving: CFC Nexus

## Payroll Deduction And Credit Card Contributions

All federal employees may pledge online through *CFC Nexus* in 2015. Card contributions will only be accepted through *CFC Nexus*. Giving is made easy — let us show you.

Basic steps to completing your pledge online.

1. Go to [www.givecfc.org](http://www.givecfc.org) — Select “Pledge Online” on homepage.
2. Register or simply log into the system. Returning donors will need to confirm their federal agency and email address.
3. Select payroll deduction or credit card (one time or recurring)

Note: Payroll pledges begin January 1, 2016. One-time credit card pledges are processed that same day.

Recurring credit card pledges are for a 12 month period beginning on the date of the transaction.

4. Select the charities to which you want to give
5. Once all charities have been added, insert the annual amount you want to give to each charity
6. Complete short survey (optional)
7. Enter and submit your pledge

*CFC Nexus* offers “**Help & Training**” (under the main menu) to show you how to register and pledge for those who are unfamiliar with the system.

## Charity Search Function

Donors can give to over 22,000 charities as a result of Universal Giving. Donors need to know how to narrow down search results so they can easily find the charities to which they want to give.

Donors must select “More Search Options” in the Charity Selection page to narrow down search results.

**CFC Charity Look Up**  
([make your pledge online now](#))

TYPE SEARCH TERMS (5 DIGIT CODE, CHARITY NAME, ETC) THEN ENTER

type search terms then press enter

PERFORM SEARCH

REFINE YOUR SEARCH, CLICK “MORE SEARCH OPTIONS”

MORE SEARCH OPTIONS



# Online Giving: CFC Nexus

## Charity Search Function

SELECT THE TYPE OF SEARCH/LIST

SEARCH CHARITIES VIEW CATEGORY LIST VIEW FEDERATION LIST

SHOW: EVERYTHING LIMIT SEARCH: EVERYTHING - NO LIMITS SORT RESULTS: RANDOMLY

BY DISTANCE FROM ZIP: ZIP: ZIPCODE X go

UNIVERSAL GIVING CHARITIES:  INCLUDE UG CHARITIES

zip searches ignore the sort filter and charities w/o zip codes

BROWSE THE ENTIRE LIST BY TYPE: ALL LOCAL NATIONAL INTERNATIONAL

PERFORM SEARCH RESET

Donors may use the following tools to narrow down search results:

- Select or unselect “Include UG Charities”
- Change option under “Show” - from “Everything” to Local, National or International
- Sort matches “By Distance from Zip” - this is particularly helpful if searching for local charities.

# Benefits of Online Giving

There are advantages (to both the CFC and the contributor) to giving online as opposed to completing a paper pledge card.

- Eliminates Errors
- Helps the CFC reduce the cost to administer the CFC.
  - Giving online means the campaign can print less materials (pledge forms and directories) and saves the campaign the time and manpower of manually entering paper pledges into the database.
- Your pledge remains more confidential.
- Donors can view and retrieve previous online pledges by logging into the system.
- Contributions made online through MyPay and Employee Express link directly to your payroll

## CFC Regulation Changes for 2017

The Office of Personnel Management (OPM) has delayed implementation of the new CFC regulations until January of 2017. Here are some highlights of the new regulations:

- OPM wants to reduce the number of pledges made by forms and wants more donors to give online. In fact, in time the only way to give through the CFC may be online. Coordinators and Keyworkers need to strongly encourage donors to give online as opposed to the paper pledge forms.
- OPM will eliminate cash contributions, including those made at events. As a result, Coordinators and Keyworkers need to condition donors away from cash pledges as best as possible and structure events such that participation is based upon a payroll pledge as opposed to a cash pledge. In the future, all events will become “educational” only.

However, cash pledges will remain a giving option for the 2015 and 2016 campaigns.

# Printing Pledges & Sending to Payroll

## Important Responsibility of Being a Coordinator!!

All pledges made through CFC Nexus **MUST** be printed by Campaign Coordinators and delivered to the payroll office. The Combined Federal Campaign Director will assign all Coordinators special privileges in CFC Nexus to view and print these payroll copies. Coordinators are encouraged to register in CFC Nexus so these privileges can be assigned.

### Steps for printing payroll pledges:

- 1) Login to Combined Federal Campaign Nexus using your username and password.



2. When you are logged in, you will see “**My Tools**” in the toolbar across the top of the page. When you hold your cursor over My Tools and Payroll Tools, you will see 6 options. The second and third options are for printing payroll pledges; **Process new pledges (single)** and **Process new pledges (bulk)**.

3. Once you select the “bulk” print option, you will see the name of your federal agency listed with the number of unprocessed pledges.

<b>NRCS</b> NRCS - Kentucky State Office 771 Corporate Drive, Suite 210 Lexington, KY 40503-5479	(1 unprocessed pledges)
<b>RURAL DEPARTMENT</b> Rural Development - Kentucky State Office 771 Corporate Drive, Suite 200 Lexington, KY 40503-5477	(1 unprocessed pledges)
<b>TSA</b> TSA - Indianapolis, IN 8303 W. Southern Avenue Indianapolis, IN 46241	(1 unprocessed pledges)
<b>VETERANS HEALTH ADMINISTRATION</b> VA Medical Center - Cincinnati, OH 3200 Vine Street Cincinnati, OH 45220	(1 unprocessed pledges)

Select the name of your federal agency.

<b>VETERAN AFFAIRS</b> VA Medical Center 1481 W. 10th St Indianapolis, IN 46202	(3 unprocessed pledges)
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[STEP 1 - PRINT ALL PLEDGES LISTED BELOW](#)

- OR -

[STEP 1 - EXPORT ALL PLEDGES LISTED BELOW \(CSV/EXCEL\)](#)

4. After printing pledges, the system will prompt you to **“Click below to return to the Pledges”** Then select **“Mark All Printed/Exported & Saved Pledges as Processed.”**

<b>VETERAN AFFAIRS</b> VA Medical Center 1481 W. 10th St Indianapolis, IN 46202	(3 unprocessed pledges)
---	-------------------------

**DO NOT CLICK THIS BUTTON UNTIL ALL PLEDGES HAVE BEEN PRINTED COMPLETELY**

**-OR-**

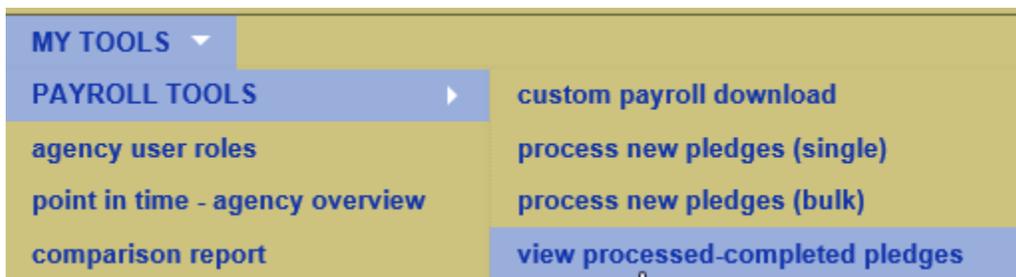
**EXPORTED AND \*SAVED TO YOUR DESKTOP\***

[STEP 2 - MARK ALL PRINTED/EXPORTED & SAVED PLEDGES AS PROCESSED](#)

**5. After printing AND processing these pledges send them to your payroll office along with any WHITE copies of paper pledge forms.**

6. You may now view them under the “**View Processed-Completed Pledges**” report under the Payroll Tab. The CFC encourages you to “process” payroll copies on a regular basis through-out the campaign.

**Attention SSA Coordinators:** Coordinators at Social Security offices do not need to print payroll copies of payroll pledges for delivery to payroll as described above. The CFC will “process” all SSA online pledges made through Nexus on behalf of Coordinators.



## Coordinator Reports

Coordinators can view summaries of pledges and donor names by selecting “My Tools”, then “Payroll Tools”, and then “Report.” Coordinators can view summaries by type of pledge by clicking on “Expand Details.” Coordinators can see whether pledges have been processed and whether the donor wants his or her donor recognition gift.

+	Veterans Affairs	[ EXPAND DETAILS ]	4	\$3,302.00	\$825.50
-	Veterans Health Administration	[ EXPAND DETAILS ]	4	\$ 3,302.00	\$ 825.50
+	VA Medical Center - Cincinnati, OH	[ EXPAND DETAILS ]	1	\$ 702.00	\$ 702.00
+	VA Medical Center - Louisville, KY	[ EXPAND DETAILS ]	1	\$ 650.00	\$ 650.00
-	VA Northern Indiana Health Care System - Marion	[ EXPAND DETAILS ]	2	\$ 1,950.00	\$ 975.00

Nexus Pledge						
PAYROLL						
Pledge ID	Date	Donor Name	Email Address	Total Donation	HR Status	Gift
1134664	08-21-15	Ryan Stults	ryan.stults@dfas.mil	\$ 1300.00	Pending	No
1134672	08-22-15	John Clausen	john.clausen@cfcinidiana.org	\$ 650.00	Pending	No

	Pledges	Total Dollars	Average Dollars
<b>2015 CAMPAIGN TOTALS</b> [ EXPAND DETAILS ]	<b>16</b>	<b>\$ 10,640.00</b>	<b>\$ 665.00</b>

[Download CSV of this report](#)

Coordinators can download a CSV of this report.

# Campaign Plan

All Coordinators should complete a Campaign Plan prior to the start of the campaign. By asking the following questions and documenting your plan of action, your campaign will be more efficient and successful. Your Campaign Manager will address these questions with you prior to the start of the campaign.

**When** do you want to begin and end your solicitation period?

The campaign will begin on **September 1 and end on December 15, 2015**.

Remember, it is preferable to keep the campaign period to about **four weeks**.

**How** many Keyworkers will you have to help support you?

The CFC recommends you have one Keyworker for every 25 employees.

If you have Keyworkers, it is important that they are properly trained.

Set a date and time to train your Keyworkers.

Your Loaned Executive will help you train your Keyworkers.

**Will** your Federal agency have its own campaign kickoff?

If so, when and where?

Discuss details in order to maximize attendance and generate enthusiasm for your campaign.

**How and when** will you and your Keyworkers plan to personally ask each employee to give?

**How and When** can you promote the CFC in group meetings?

Invite your Loaned Executive to speak or request a speaker to give his/her personal story (submit your request through your Loaned Executive).

**What** kind of special events do you intend to have?

Look at which events have been successful in the past and which encourage the most participation.

Be creative and do something new—invite local charities into the office for a charity fair or tour a local charity.

**How** can you involve the local union(s)?

Have them communicate their support for the CFC.

Involve them in all CFC activities; Kickoff, rallies, group meetings, etc.

**How** will you communicate the results of the campaign?

Communicate results using goal thermometers, newsletters, emails, etc.

**How** will you say thank you to everyone who participated and contributed?

The thank you may be a certificate from the agency head.

It may take place at a victory celebration or in person.

Make sure the thank you is personal and sincere.

# Campaign Materials

The Coordinator in each Federal agency will receive the appropriate amount of the following campaign materials prior to the kickoff of their campaign. Find your five digit federal agency code on the label of your bag of materials. Keyworkers should ask their coordinator for the code.

## Tri-fold Brochures

These general brochures are **designed to help educate potential donors** about the benefits of giving through the CFC. These brochures are particularly helpful for new federal employees or non-givers. Please give copies to Human Resources, if they don't already have them, so new employees may be oriented towards the CFC.

## Postcards

Two different versions of the post card exist to promote online giving: one for MyPay and another for CFC Nexus. You may download both of these from [www.givecfc.org/coordinator & keyworkers/campaign materials](http://www.givecfc.org/coordinator%20&%20keyworkers/campaign%20materials). Print your five digit agency code on the MyPay postcard before handing out.

Coordinators and Keyworkers are encouraged to distribute copies of the Tri-fold Brochure and / or Post Card together **at the beginning of the campaign when they personally ask their coworkers to contribute**. Coordinators and Keyworkers should inform employees that copies of the campaign directory and pledge form will be available later in the campaign. The intent is to give employees time to pledge online before the directories and pledge forms are made available.

## CFC Directory (Giving Guide)

Identifies the charitable organizations to which Federal employees may designate their gift.

## Report Envelopes

The envelopes used to turn in completed paper pledge forms to CFC Headquarters.

## Pledge Forms

The forms by which contributors indicate the amount of their gift and the charitable organization(s) to which they want to designate their gift. Coordinator may print their 5-digit agency code on them before handing out.

## Posters

To advertise and promote the campaign.

## Goal Thermometers

To report and promote the progress of the campaign within a specific Federal agency or a particular office or department.

## CFC Videos

Several videos about the CFC are available on the CFC website under "Coordinator & Keyworker" tab and the "CFC Video" page. These videos are from 3 to 8 minutes long.

**All of these resources can be found online at [www.givecfc.org](http://www.givecfc.org)!**

# Pledge Form Instructions

## 1. Personal Information

Be sure your name is readable. Enter your federal agency code number in the top center on the line provided (obtain by emailing the CFC Director at [orvcfc@gmail.com](mailto:orvcfc@gmail.com)). If giving by payroll deduction, enter your Social Security number. Cash or check givers do not need to provide a Social Security number.

## 2. For Payroll Giving

Write in the amount of payroll deduction per pay period. Multiply the amount of the deduction by 12 for military personnel or by 26 for civilian personnel to determine the total gift amount (minimum payroll deduction authorized is \$2.00 for military or \$1.00 for civilian personnel). Sign and date the pledge card for authorization.

## 3. For Cash or Check Giving

Write in the amount of your total gift in the space labeled "Check/Cash Amt." Also write in the check number and the date of the cash or check contribution in the lines provided. Make checks payable to "Combined Federal Campaign" or "CFC." All cash or check contributions must include a pledge card. The suggested minimum contribution by cash or check is \$2.00.

## 4. Designation Options

Write the 5-digit code number and annual amount in the designation blocks provided, up to five organizations per card. Total designations cannot exceed the total annual gift. If you do not wish to designate your gift to a specific charity, leave the space provided blank.

## 5. Recognition Options

If you want to be thanked by the charity(s) towards which you give, please provide a complete home address or email. Your designated charities will use this information to thank you by mail or email. If you would like the amount of your donation to be released as well, check the appropriate box. Otherwise, your thank you letter will be generic and not reflect the specific dollar amount of your donation.

## 6. Copy of Pledge Card

Detach copy #3 (pink copy) and keep for your records. Return copies #1 and #2 (white and yellow copies) to your Coordinator or Keyworker.

**ALL CONTRIBUTIONS TO CFC ARE TAX DEDUCTABLE..**

# Pledge Form Accuracy

Your role in verifying the accuracy of all pledge forms is very important! If a pledge form is filled out incorrectly and sent to the CFC Headquarters for processing, the pledge form will be returned to your office for follow-up.

## **Reasons why a pledge form may not be processed:**

- Incomplete charity codes—make sure donors use current codes obtained from the 2015 directory or website. Charity codes will always be five digits.
- Payroll Pledge is missing Social Security Number or not signed.
- Cash pledge - If the cash or check does not accompany the pledge
- The total gift amount and the total designations amount do not match

## **Please ensure that the total gift amount is computed and stated accurately.**

Please make sure the total gift amount divides evenly by the number of pay periods (26 for civilians and 12 for military). Total gift amounts must be divisible by 26 or 12.

**Example:** If a donor wanted to give a total gift amount of \$500, then \$500 divided by 26 pay periods is \$19.23 per pay period. However, \$500 doesn't divide evenly by 26—you have a fraction of a cent left over ( $\$500/26 = \$19.2307$ ). So the donor should give either \$499.98 or \$500.24 because both numbers are evenly divisible by 26.

$$\$19.23 \times 26 = \$499.98 \quad \text{OR} \quad \$19.24 \times 26 = \$500.24$$

This will ensure that pledge forms and report envelopes are completed accurately.

# Copies of the Pledge Form

## **It is important that Federal employees complete a new pledge form for each campaign.**

If the contributor wants to continue designating his or her gift to a particular charitable organization(s), he or she must fill out a new pledge form each year.

### **Top Copy (White) - Payroll office**

- Deliver to your Payroll Department/Office (Payroll deduction only) by December 15, so that payroll allotments are implemented with the effective date of January 1, 2016. All top copies for gifts made by cash or checks may be discarded.

### **Middle Copy (Yellow) - To Central Receipt Point Of CFC Headquarters**

- All middle copies must be turned in with your report envelope. The Coordinator must submit the middle copies to the CFC regardless of the type of pledge.

### **Bottom Copy (Pink) - Contributor Copy**

- The contributor should retain the contributor's copy for his or her own tax records

**Keyworkers should turn in the top two copies to the Campaign Coordinator, who will forward the top copy to payroll and turn in the second copy to CFC Headquarters in a report envelope.**

# Report Envelope Instructions

Report envelopes with cash and checks should be completed separately from report envelopes with payroll pledges. No cash or checks will be accepted unless put in a report envelope and properly completed.

Complete the following portions of each report envelope:

1. Federal Agency Name
2. 5-Digit Federal Agency Code (New this year)
3. Address
4. Coordinator or Keyworker name and contact information
5. # of Pledges— Don't forget to check for accuracy
6. Total \$\$\$ Amount
7. Signature

**All Federal agencies are encouraged to turn in pledges on a regular basis—at least every two or three weeks. Large Federal agencies may either turn in one report envelope including all of the contributions, or a report envelope from each separate Keyworker**

Report Envelope Cash & Checks Only			 Combined Federal Campaign															
<input type="checkbox"/> Envelope for Special Event																		
Federal Agency _____		Keyperson's Name _____																
Code Number _____		Phone Number _____																
Address _____		Email Address _____																
City, ST, Zip _____		Is this the last Report Envelope: Yes or No _____																
Ohio River Valley CFC	CFC #: 0682	Date: _____	Envelope #: _____															
<b>PCFO USE ONLY</b> Envelope Number _____			Date _____ Picked up at company location Received at CFC Headquarters Cash & Checks Reconciled Pledges entered into database															
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Cash & Check Pledge Cards	Number of Pledges	Total Amount																
Coins (Convert to bills so less than \$1 in coins)																		
Cash - Bills																		
Checks																		
<b>Total</b>																		
Number of Sealed Envelopes _____																		
Keyworker Signature _____		Date: _____																
Coordinator Signature _____		Date: _____																
Loaned Executive Signature _____		Date: _____																
CFC Director Signature _____		Date: _____																

Report Envelope Payroll Deduction Only			 Combined Federal Campaign												
Do not include online or cash contributions.															
Federal Agency _____		Keyperson's Name _____													
Code Number _____		Phone Number _____													
Address _____		Email Address _____													
City, ST, Zip _____		Is this the last Report Envelope: Yes or No _____													
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Keyworker Signature _____		Date: _____													
Coordinator Signature _____		Date: _____													
Loaned Executive Signature _____		Date: _____													
CFC Director Signature _____		Date: _____													

# Turning in Report Envelopes

Below are steps for the completion and submission of report envelopes:

- Coordinators with large amounts of cash pledges are encouraged to convert that cash into a money order(s) before submission to the CFC. This is purely optional, but the CFC encourages Coordinators with more than \$300 in cash pledges to convert them to money orders before completion of the report envelope.
- The Coordinator should seal the top of the report envelope before it is submitted to CFC Headquarters. The person who seals the report envelope should place his or her initials over the seal of the envelope on the back side. This will ensure the seal is not broken before it arrives in CFC Headquarters.
- The Coordinator should also sign the bottom portion of the report envelope signifying that the totals on the face of the envelope are correct. Each person who assumes possession of a report envelope should sign his or her name in the space provided, even if it means adding additional spaces on the report envelopes
- No cash or check pledges will be accepted without being in a sealed report envelope.
- Coordinators can submit report envelopes to CFC Headquarters several different ways.
  - ◇ In many cases, the CFC Director or Loaned Executive will pick up all report envelopes from Coordinators at the Coordinator's office.
  - ◇ Coordinators may deliver report envelopes to the local CFC Headquarters.
  - ◇ Coordinators may mail report envelopes to the CFC Headquarters at 550 Main Street, Room 1-116, Cincinnati, OH 45202.
- Before Coordinators submit report envelopes to the CFC office or staff, the Coordinator should photocopy the face of each report envelope for submission.
- When the CFC Director or Campaign Manager receives the report envelope(s), the CFC staff should sign both the face of the report envelope at the bottom in the appropriate space and the Coordinator's photocopy of that report envelope.
- After submission of the report envelope(s) to the CFC office or staff, the Coordinator should fax a copy of that report envelope to (317) 423-3262. The Coordinator may also scan and email copies of the submitted report envelopes to [cfcindiana@gmail.com](mailto:cfcindiana@gmail.com).

Coordinators are encouraged to track the status and progress of their Federal Agency's campaign by visiting the local CFC website at [www.givecfc.org](http://www.givecfc.org) (see **page 18**). If the Coordinator's campaign totals do not match the CFC's totals, then the Coordinator should notify the local CFC office and resolve any discrepancies.

**Any volunteer should contact John Clausen** at (317) 423-3442 or [John.Clausen@cfcindiana.org](mailto:John.Clausen@cfcindiana.org) or Tim Comer at (513) 263-3399 or [timothy.j.comer@irs.gov](mailto:timothy.j.comer@irs.gov) should he or she suspect any wrongdoing or illegal activity related to the activities of the CFC.

# EAGLE CLUB AWARDS

The Eagle Club Recognizes Exceptional Givers

**Pledges of \$240 or Above** Qualify You for Membership in the Eagle Club

## Platinum Eagle Contributor

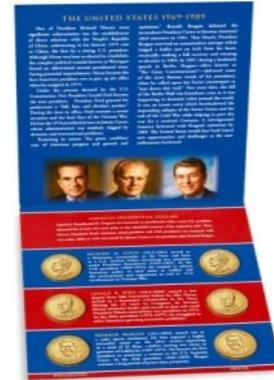
2016 Presidential \$1 Coin Uncirculated Set

from the US Mint

Annual Donation of \$1,560 and above

Civilian Minimum Contribution - \$60 per pay period

Military Minimum Contribution - \$130 per month



## Gold Eagle Contributor

Deluxe Travel Kit with case, 2,200 mah Powbank, Car charger, USB – Micro cable, and ear buds.



er

Annual donation of \$650-\$1559.99

Civilian Minimum Contribution - \$25 per pay period

Military Minimum Contribution - \$54.17 per month

## Silver Eagle Contributor

2016 Challenge Coin



Annual Donation of \$240-\$649.99

Civilian Minimum Contribution - \$9.24 per pay period

Military Minimum Contribution - \$20 per month

# Special Events Recommendations

**Special Events are a fun, effective way to enhance your CFC campaign.**

Special events:

- Create ENTHUSIASM!
- Create AWARENESS
- EDUCATE employees about the benefits of the campaign
- ENCOURAGE employees to submit a pledge card promptly
- INCREASE the money raised from your federal agency

## **Recommendations**

- Make them FUN!
- Make sure EVERYONE is included.
- Strategically schedule them throughout the campaign to be most successful.
- Make it EASY for employees to participate—Plan events around other meetings and events.
- Have different locations or departments challenge each other in competition.
- Incorporate payroll giving into special events by tying it to the admission or competition. (see examples on sheet in training folder)

## **Don'ts**

- Make sure events are not coercive—participation is voluntary!
- Participation in a special event should never be intended to replace one's regular pledge.

## **Rules and Regulations**

- MUST occur with the campaign period for your federal agency.
- Get approval from the appropriate agency head or official.
- Be consistent with agency ethics and regulations.

**All funds raised by Special Events must go to Undesignated Funds.**

# Incorporating Payroll Giving into Special Events

Special Events typically involve the collection of cash and checks which are turned into CFC Headquarters as a lump sum, meaning the participants are not individually counted as contributors. The CFC encourages you to incorporate payroll giving into your agency's Special Events in order to boost your total contributions!

## **Coordinators may incorporate payroll giving into Special Events several ways:**

- Give co-workers the option of participating in the special event if they complete a payroll pledge, rather than make a cash/check contribution. For example, John can join the chili cook-off if he completes a payroll contribution of at least \$1 per pay period in place of making a \$5 donation.
- Because co-workers gave through payroll deduction, they will be able to participate in all special events!

Coordinators should have pledge forms and campaign directories on hand at Special Events if they plan on incorporating payroll giving. Coordinators can also make laptops available so people can easily pledge online - this has been very successful in the past.

Encourage co-workers to choose payroll giving so they may designate their contribution to their favorite charity(s). In addition, the incorporation of payroll giving at Special Events offers another option for those who don't carry cash.

## **How to turn in money raised at a Special Event**

Special events are activities where federal employees have the opportunity to participate in the campaign without formally completing a pledge card. A separate pledge card should be completed that says "SPECIAL EVENT" where it asks for the donor's name. The federal agency code at the top of the card needs to be completed along with the dollar amount in the space provided for cash and checks. The rest of the card can be left blank.

The pledge card along with the accompanying cash and checks should be placed in a separate report envelope with the "SPECIAL EVENT" box marked at the top. On section 1 of the report envelope, indicate zero donors and the total dollars raised. A separate report envelope and pledge form should be completed for each Special Event.

Remember that monies raised from a special event may not be designated to a particular charity. All monies raised from special event must remain undesignated.

# How to Get Non-Givers to Contribute

The single most effective method to convince non-givers to contribute in the future is the **help them identify with a particular charitable organization and how they may have benefited from a charity supported through the CFC**, either directly or indirectly.

## Questions to ask:

- Have you ever had a family member suffer or die from **cancer**?
- Have you ever had a family member suffer the effects of **diabetes** (or any other common or rare disease)?
- Have you ever taken swim lessons at the **YMCA**?
- Have you ever taken a **CPR class** sponsored by the American Red Cross?
- Have you ever been struck by some type of **natural disaster**?
- Have you ever served as a **Big Brother** or **Big Sister** or mentored a child?
- Have you ever attended a **boys or girls club**?
- Did you ever participate in the **Boy Scouts** or **Girl Scouts**?
- Have you ever known someone who sought treatment for an **alcohol or drug addiction**?
- Have you ever known someone who sought help for **depression** or some other **mental illness**?
- Have you ever known someone who sought help for **domestic violence**?
- Have you ever known someone who has struggled to afford **daycare** or **after-school programs**?
- Have you ever known someone to receive care at one of the **Children's Hospitals** or stayed at the **Ronald McDonald House**?
- Have you ever wanted cleaner water or a **cleaner environment**?
- Have you ever had a family member take care of an **elderly parent**?

## Make your own question—there are so many!

If they answered yes to any of these questions, there is a good chance they have benefited from a charitable organization supported through the CFC. Help them identify charities who work with these causes using the search engine of the CFC website or one of the campaign directories.