

ONLINE PLEDGING

GET YOUR GIVE *Online* 

www.desertswcfc.org



SERVING *our* COUNTRY
SUPPORTING *our* COMMUNITY



WHY DONORS SHOULD CONSIDER PLEDGING ONLINE

- ***Convenient***: pledging online allows donors to complete their pledge to the CFC from the privacy and comfort of your computer.
- ***Searching***: finding charities of interest is easy through the interactive search tool. Donors can search, sort, and filter charities to find the ones that they feel deserve their dollars. Donors can even research through charity websites while creating a pledge.
- ***Math is made simple***: donors enter the amount per pay period and decide how much of their total annual donation goes to each charity.
- ***Accessibility***: donors can log into their CFC Nexus account at any time to view, print, or email pledges made in the past. This is convenient for the tax season.
- ***It's green***: pledging online means fewer pledge cards and charity lists need to be printed.
- ***Efficient***: because donors' online pledge cards are fully legible, with perfect math, and designated to the charities they decide, the CFC and payroll centers time to process pledges is greatly reduced. Therefore, more money can go directly to the charities the donor chooses.
- ***Reporting***: ECMs can check the reports to see how your Federal agency compares to others and gives you up-to-date reporting on the results of your agency's campaign.

ONLINE PLEDGING IS LESS WORK FOR ECMs

- ECMs do not have paper pledge forms to process when donors pledge online.
- Each ECM will have access to pledge information from their agency which helps track pledges for reporting to Agency directors.
- ECMs do not have to keep track of paper pledge forms, payroll copies, ECM Return Envelopes, and more!
- At the end of the campaign, ECMs print out their agency's donor pledges/information and send the entire report to their payroll office.

HOW TO ENCOURAGE ONLINE PLEDGING

The Desert Southwest CFC will provide posters, post-it notes, email & newsletter articles, sample letters for directors to send out, and more to help you encourage online pledging. These items will be available in this handbook and online at www.desertswcfc.org.

PLEDGING WITH A PAPER PLEDGE FORM

PLEDGE FORM

Ensure every person that wants a pledge form receives one! It is a 3-part form used to record donor information, contribution method, amount, designation data and payroll deduction authorization. A donor may give by cash, personal check, or payroll deduction.

PAYROLL DEDUCTION

Encourage potential donors to give the easy way Contribute through payroll deduction. With payroll deduction, contributors can give a little more over a longer period of time. By doing so, they can make a significant contribution toward solving the many problems which impact so many lives.

- *Convenient*
- *Effective January through December*
- *Cost efficient*

Payroll deduction must continue for at least 3 months. A donor with an employment expiration before 3/31/14 can make a gift by cash or check. A donor who has an expiration of service between 4/1/14 and 12/31/14, and desires to use payroll deduction, should divide their desired total gift amount by the number of months/pay periods they will be contributing to determine their withholding amount. Enter this amount in the "AMOUNT" column then multiply it times the appropriate interval (12 or 26). This will calculate to a total annual gift higher than the donor's desired total gift amount, but because the contribution will terminate with service, their amount withheld will equal their desired total gift amount.

Note:

The minimum military payroll deduction is \$2.00 per monthly pay period;

The minimum civilian deduction is \$1.00 for each bi-weekly pay period.

CONFIDENTIAL GIFTS

A donor may keep his or her contribution confidential. Have the donor keep the donor copy and place the rest of the pledge form in a sealed envelope marked "**CONFIDENTIAL CFC GIFT.**" Confidential gift envelopes are to be forwarded *unopened* to the CFC Office for further processing. Place the confidential gift in the **REPORT ENVELOPE** and note the gift on the report form.

PLEDGE COLLECTION

Collect the pledge forms. Keep the 3 part forms intact as you review them. Please check the pledges for legibly, completeness, and accuracy. The forms must be properly completed before they are turned in to your point of contact of CFC Specialist. Instructions for verifying completeness of the pledge form are on the next page. Once the pledge is verified, give the pink copy back to the donor for their records and turn the remaining white copy (payroll copy) and yellow copy, (Central Receipt and Accounting copy) to your point of contact or CFC Specialist in the reporting envelope.

DONOR RECEIPTS

Ensure every donor receives COPY #3 of the pledge form. This receipt may be retained by the donor for IRS allowed charitable gift deductions (see appendix for additional tax-deduction regulations).

CFC PLEDGE FORM INSTRUCTIONS

Incorrect and/or incomplete pledge forms will be returned to the Volunteer. Please help avoid processing delays by reviewing each form to ensure the following items have been correctly and legibly entered:

1. Contributor's **full name**.
2. **Social Security Number** is only necessary for those giving through payroll deduction.
3. **Minimum Payroll Deduction** gift is \$1.00 per pay period
4. Check that the **annual amount** is correct:

Military: monthly amount x 12 = annual amount

Civilian: pay period amount x 26 = annual amount
5. **Contributors using payroll deduction must sign the authorization at the bottom of the card.**
6. Contributor's **checks** must be made payable to **Combined Federal Campaign**. Checks payable to a designated charitable organization **cannot** be accepted.
7. For **designations**: Contributors are encouraged to designate their contribution to any agency on the **approved list – the CFC charity list is also online at: deserswcf.org**. This is done by placing the five (5) digit agency code number in the box labeled **“Five Digit Agency Code.”** *Be sure this is a valid number and that it is legible.*
8. Be sure that the **total amount designated does not exceed the total annual contribution** shown in box 4.
9. Release of contributor names to designated agencies
 - A. If the contributor wants his/her name, address and home email address released to the designated agencies, contributor must **completely** fill in the area, or information will not be released.
 - B. Pledge amount box **MUST** be checked to release amount of donation along with name and address to assigned charity.

DO NOT SEPARATE CASH OR CHECKS FROM PLEDGE FORM. Attach cash or check to the pledge form with a paper clip. **DO NOT STAPLE.**

TOP 5 COMMON ERRORS

1. Illegible. If it is unreadable, the pledge may not be processed correctly.
2. Payroll deduction is listed as the annual gift – when specifying your gift to each agency fill in the ANNUAL AMOUNT.
3. Designation to an invalid agency code. Pledges can only be made to agencies listed in the 2013 Desert Southwest CFC Charity List.
4. Form isn't signed – payroll deduction cannot be authorized if the form isn't signed.
5. Social Security Number or Employee Identification Number is not provided – payroll deduction cannot be authorized without the SSN or EIN.

TALLYING INSTRUCTIONS FOR REPORT ENVELOPE

1. Count the number of forms in your envelope.
2. Divide the pledge forms into three piles: Payroll Deduction, Cash, and Check.

CASH CONTRIBUTIONS:

3. Match and ATTACH with paper clip the cash with the appropriate pledge form.
4. Compare the amount pledged with amount designated. **IF DESIGNATIONS ARE LESS THAN THE TOTAL DONATION, THE DIFFERENCE IS DEEMED UNDESIGNATED. IF DESIGNATIONS ARE MORE THAN THE TOTAL PLEDGE, RETURN THE PLEDGE FORM TO THE DONOR TO CORRECT AND THEN INCLUDE IN YOUR ENVELOPE TALLY.**
5. In the "US Currency" row, complete NUMBER OF DONORS (number of people contributing by cash) and AMOUNT(S) (cash dollars given). Keep cash attached to respective pledge forms with paper clips and place in the envelope.

CHECK CONTRIBUTIONS:

6. Match & ATTACH with paper clip the check with the appropriate pledge form.
7. Compare the amount pledged with amount designated. **IF DESIGNATIONS ARE LESS THAN THE TOTAL DONATION, THE DIFFERENCE IS DEEMED UNDESIGNATED. IF DESIGNATIONS ARE MORE THAN THE TOTAL PLEDGE, RETURN THE PLEDGE FORM TO THE DONOR TO CORRECT AND THEN INCLUDE IN YOUR ENVELOPE TALLY.**
8. In the "Checks" row, complete NUMBER OF DONORS (number of people contributing by check) and AMOUNT(S) (dollars given by check). Keep checks attached to respective pledge forms with paper clips and place in envelope.

PAYROLL DEDUCTIONS:

9. Recalculate the math on the payroll deduction pledge cards:
 Military amount x 12 pay periods
 Civilian amount x 26 pay periods
10. Compare the amount pledged with the amount designated. **IF DESIGNATIONS ARE LESS THAN THE TOTAL DONATION, THE DIFFERENCE IS DEEMED UNDESIGNATED. IF DESIGNATIONS ARE MORE THAN THE TOTAL PLEDGE, RETURN THE PLEDGE FORM TO THE DONOR TO CORRECT AND THEN INCLUDE IN YOUR ENVELOPE TALLY.**
11. In the "Payroll Deduction" row, complete NUMBER OF DONORS (number of people giving by payroll deduction) and AMOUNT(S) (total dollars pledged by payroll deduction.) Place in envelope.
12. Add the total number of donors & dollars in the appropriate box on the Report Envelope.

CONFIDENTIAL CONTRIBUTIONS:

13. Put the number of confidential contribution envelopes in the box below the "Cash, Checks, and Payroll Deduction" table and place in envelope.

FINAL PREPARATION:

14. Sign the ECM space.
15. Make a copy of the front of the envelope for your records.
16. Bring it to CFC Specialist for joint verification.
17. **Seal the envelope.**
18. **Give to CFC Specialist for return to CFC Office.**

The ECM report envelope is used to record all contributions received by the ECM. Fill out the form completely as illustrated as below:

STEP 1

Mark if this report envelope is the first envelope turned in, additional envelopes, or the final pledges for your Federal agency.

Desert Southwest CFC (0606)

ECM REPORT ENVELOPE & FORM

THIS REPORT IS: FIRST _____ ADDITIONAL _____ FINAL _____

Agency or Installation _____

Unit Name: _____

Unit Code: _____

ECM: _____

Telephone: _____

E-Mail: _____

Total Number of Employees in Your Unit: _____

Total Number of Employees contacted to Date: _____

STEP 2

Complete the number of employees in your unit/agency and how many people have been contacted to date.

STEP 3

Make sure this ENTIRE top section is completed accurately.

ECM Instructions

1. Fill in the summary information requested below for those contributions contained in this envelope. DO NOT include any information previously submitted.
2. Place all completed pledge cards, cash, and checks in this envelope and deliver to your CFC Specialist.
3. With your CFC Specialist, validate the contents of this envelope and sign at the bottom.
4. Make a copy of the face of this envelope for your records.

STEP 4

Provide a specific breakdown of pledges contained in this envelope.

METHOD OF PAYMENT	NUMBER OF DONORS	AMOUNT(S)
U.S. Currency	_____ donors	\$ _____
Checks	_____ donors	\$ _____
Payroll Deduction	_____ donors	\$ _____
Envelope Totals	Total donors _____	Total \$ _____

Indicate the number of KNOWN cash, check, and payroll deduction contributions, and the total of each.

# of CONFIDENTIAL DONATIONS Enclosed (not reported above)	Total donors _____
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Add the total number of contributions and insert in the "Totals" column; do the same for the KNOWN monetary totals (some contributions may be in sealed "confidential envelopes").

We have validated the contents of this envelope and confirm that it contains the cash, checks and payroll deduction amounts reported above.

Keyworker _____

ECM _____

CFC Specialist _____

PCFO _____

Date _____

STEP 5

Sign the Keyworker or ECM space. At the time the envelope is turned in, have the person receiving the envelope verify accuracy and sign.

DO NOT WRITE IN THIS SPACE

FOR USE BY CFC ACCOUNTING AGENT

Batch #: _____

Amount: _____

Processed: _____

Verified: _____

Payroll Deduction: _____

Cash/Check Contributions: _____

Total _____

ECM TURN-IN PROCEDURES

Pledges received from donors are to be turned in on a weekly basis to the designated point of contact or CFC Specialist for immediate processing. This enhances donor confidence in the CFC process. ECMs are responsible for:

1. Verifying that pledge cards are legible and filled out completely and accurately.
2. Ensuring that cash and check contributions match the amounts indicated on the pledge forms.
3. Verifying the total pledge matches the amount designated to the charities.
4. Verifying the use of five digit charity codes; none start with zero.
5. Preparing pledge forms for Report Envelope and turn-in:
 - a. White & yellow copies are separated into cash, check, and payroll deduction.
 - b. Cash and Checks should be secured to the white copy of each pledge form with a paper clip or tucked between the top and second copy of the form. **DO NOT STAPLE CASH TO THE PLEDGE FORMS.**
 - c. Payroll Deductions must be signed, and include a Social Security Number. The white copies go in the Report Envelopes.
 - d. The Pink Copies are for the donor for tax records – return to the donor if they turn it in.
6. The Report Envelope should be completely filled out with the ECM's contact information.
7. The total amount and number of donors for each Cash, Check, Payroll Deduction donation is then recorded on a Report Envelope, along with the grand totals.
8. If a confidential contribution is received, it SHOULD NOT be recorded with any of the reported totals. Confidential envelopes should remain sealed until processed by the PCFO (CFC Staff). Simply indicate the number of confidential donations (if any) in the "Number of Confidential Envelopes Enclosed" box as indicated.
9. Remove the payroll copy of the pledge form, put it in a separate regular envelope, and bring it, or mail it, to the Payroll office for your Federal agency.
10. Sign the report where indicated. Make a copy of the face of the envelope and keep for your records. DO NOT SEAL ENVELOPE. Contact your CFC Specialist for content verification.
11. The assigned CFC Specialist must verify content of the envelope and sign it in the presence of the ECM to relieve the ECM of responsibility for the Report Envelope and its contents. The point of contact or CFC Specialist will give you a new report envelope for the following week's turn-in.
12. CFC Specialist will hand-deliver the sealed envelope to the CFC Office for processing.

TYPICAL PLEDGE AND REPORTING QUESTIONS

Q: Can a donor give to more than 5 charities?

A: If a donor wants to give to more than 5 charities, have them fill out 2 (3 if more than 10 agencies) additional pledge forms indicating the CFC charities that they want to contribute to, along with the annual amount for each. Each pledge form must be clipped together for processing at Federal Payroll offices and be marked "1 of 3", "2 of 3", "3 of 3" etc.

Q: Will confidential donations be counted towards the agencies goals?

A: YES, the PCFO will update records to include confidential gifts. Many other anonymous factors also adjust an agency's records including: pledges received or cancelled by mail, NSF or checks that were cancelled, and corrections made to turn-ins.