



Desert Southwest Combined Federal Campaign

2016 CFC Keyworker Guide

You've been selected to be a Combined Federal Campaign Volunteer CONGRATULATIONS! You are in a unique position. You'll have the responsibility of collecting money and pledges that will help support hundred of charities helping millions of people throughout the world. YOU are the CFC lifeline between people who need help and people who can help.

There are four essential steps in helping to encourage people to give through the Combined Federal Campaign (CFC).

1. **Learn the Facts About CFC**
2. **Make Your Own Gift First**
3. **Ask Other People to Give**
4. **Say Thank You!**

STEP 1: Learn the Facts about CFC

If you know the facts about CFC, you will be more confident, more comfortable and much more effective when you ask for contributions. Three good sources of information are the website (www.desertswcfc.org), the charity list, and volunteer training activities. If you still have questions about CFC after the training session and reading your material, contact your agency's CFC Employee Campaign Manager (ECM).

STEP 2: Make Your Own Gift First

You'll discover that making your contribution before you ask others to give shows that you believe in what you are doing. It will make it easier to ask others to join you in giving through the CFC.

STEP 3: Ask Others to Give

One of the most effective ways to tell the people you work with about the CFC is to invite them to a small meeting. This approach works best when you invite less than 20 people, so you may need to schedule several meetings. To coordinate a CFC meeting, follow these helpful suggestions:

1. Schedule a meeting date and time, and reserve a room with a TV/ DVD player or, better yet, WiFi.
2. Utilize the 2016 video which is available to view online.
3. Invite people to the meeting. It's always an incentive to serve food!
4. Ensure you have CFC pledge forms and charity lists at the meeting.
5. Conduct the meeting.

Some of your co-workers may not be able to attend the group meeting. In that case, or if a group meeting is not possible, talk to individuals one-on-one about the benefits of CFC. This also gives you an opportunity to answer their questions and address concerns. 100% *awareness* and 100% *opportunity* is your goal. Although CFC regulations prohibit setting a goal of 100% *participation*, the highest rate of success comes with contacting 100% of all your co-workers and making sure they are educated about the CFC and are given the opportunity to contribute.



WHAT DO YOU SAY? It's a lot easier than you may think! Just remember four things and you'll do a wonderful job:

1. **Personalize the visit**
2. **Talk about payroll deduction**
3. **Ask for the pledge**

1. Personalize the visit:

- Talk about one or more charities with which you have had personal experience.
- Share the story of someone you know who has been helped by a CFC agency.
- Notify them that at least 86 cents of every dollar they give through CFC will be forwarded to the agencies.
- Tell them that their gifts will help thousands of people who really need their help.
- Encourage donors to designate their gift to a favorite charity in the charity list.
- ***The charity list is also available online: www.desertswcfc.org***

2. Talk about Payroll Deduction:

- Encourage a payroll deduction pledge – it's EASY and it will usually be up to six times larger than a cash gift.
- Demonstrate that a payroll deduction pledge is an easy way to translate a small amount each payday into a gift that will help their agency help those in need.
- Encourage co-workers who have traditionally made cash gifts to consider a payroll deduction pledge.
- Explain that donating to their favorite charity through CFC helps charities MORE than if they make a gift directly to a charity.

3. Ask For the Pledge

- Once you've educated them on CFC, ask for a contribution and be ready to help the contributor fill out a pledge form. Instructions for pledge form completion are listed in this Guide as well as the charity list.
- Give contributor the pink copy of the completed pledge form as their receipt.
- Tally the pledges and fill in the information on the front of the appropriate report envelope.
- Turn in the completed report envelopes to your ECM.
- Some key phrases are
 - “At what level do you think you would like to give?”
 - “I hope that you can make a contribution – every gift helps.”
 - “Could I answer any question about filling out the pledge form?”
 - “Could I help you fill out your pledge form?”
 - “Could you please return your pledge form to me by _____?”

STEP 4: SAY THANK YOU!!

Thank everyone for taking time to learn about the CFC and thank those who contribute. Once your campaign is complete, order the donor recognition items through your ECM. Remember ... a smile and a sincere “thank you” is easy and meaningful to donors.

THANK YOU FOR ALL THE WORK YOU ARE ABOUT TO DO!
Your job is very important and thousands of people who receive help through CFC-funded charities are counting on your success. On behalf of these people Thank you!

Visit www.desertswcfc.org
for the complete 2016 charity list or to donate online.



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: www.desertswcfc.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. Monthly gift 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 Desert Southwest CFC Charity List or online at www.desertswcfc.org.
4. Form isn't signed – payroll deduction cannot be authorized if the form isn't signed.
5. Social Security Number is not provided – payroll deduction cannot be authorized without the SSN.



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 Keyworker space.
15. Make a copy of the front of the envelope for your records.
16. Bring it to ECM for joint verification.
17. **Give to ECM for continued processing.**

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 _____