

# *Keyworker's Training Guide*





## Combined Federal Campaign of Eastern Pennsylvania & South Jersey

[www.cfc-eastpa-southnj.org](http://www.cfc-eastpa-southnj.org)

Telephone (215) 665-2965 or (609) 267-4500

My fellow federal employees,

Thank you for participating in our 2016 Combined Federal Campaign! Every year, we join together and Show Some Love through our commitment to supporting charities in their important work providing comfort for our friends and neighbors in need.

We pledge our aid to people and organizations in our neighborhoods and around the world that need our help.

We federal employees make an important contribution to our local charities through the Combined Federal Campaign. No matter where your interests lie, whether it's finding a cure for a terrible disease, feeding and sheltering animals, protecting rainforests, caring for our veterans, or helping victims of domestic violence, there are charities that provide those services in our campaign. Together, we continue to support organizations that enable people to qualify for jobs, protect civil rights, have safe drinking water, and develop artistic genius. We make a difference.

Electronic pledging, whether through myPay, Employee Express, or CFC Nexus, ensures that your contributions reach the charity of your choice, expedites the pledging process, and reduces the environmental impact of paper pledging. It's confidential, accurate, and secure. The hardest part of making your pledge is deciding what charities you will support.

Donating through payroll deduction enables you to provide a continuous funding stream to your chosen organizations, and makes it easy to support positive changes in the world every time you get paid, without fail. **Together, we Show Some Love.**

Thank you for being part of this year's campaign.

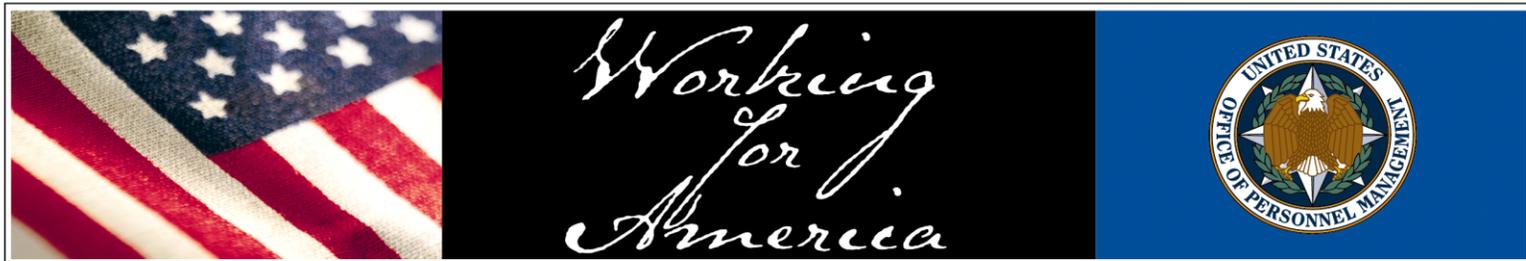
*Sincerely,*

*Lisa Makosewski  
LFCC Chair*

*Executive Director  
Philadelphia Federal Executive Board*



# UNITED STATES OFFICE OF PERSONNEL MANAGEMENT



[www.opm.gov](http://www.opm.gov)

## FIVE-DIGIT CFC CHARITY CODES

1. Every charity will have only one five-digit, numeric CFC code.
2. The five-digit code is assigned to the charity for the life of that charity. Another code will not be assigned to the charity nor will that code be assigned to a different charity.
3. A five-digit code assignment does not mean that the charity is eligible to participate in the campaign. Charities must be reviewed annually by their campaigns for eligibility.
4. The Undesignated category code is assigned five nines: 99999
5. The International Quad I code is assigned five number ones: 11111
6. Incorrect CFC charity codes are those that are: a) not exactly five digits in length; b) contain a letter or other symbol; or c) begin with the number zero.
7. Designations made with incorrect CFC codes which cannot be resolved or corrected cannot be honored and will become undesignated contributions according to OPM Regulations 5 CFR § 950.402(c) and 5 CFR § 950.501.

# RUNNING A CAMPAIGN

## 1. Preparation

- Make your own commitment
- Learn about the CFC story and needs of the community
- Review past campaign results
- Involve your Agency Director
- Organize campaign materials

## 2. Planning

- Recruit a campaign steering committee (this is a must in large organizations)
- Set goals and objectives for your campaign
- Recruit solicitors/campaigners (one solicitor for each 20 employees)
- Develop a campaign schedule

## 3. Train Your Solicitors

## 4. Leadership

- Commitment from the top is a very important factor. The CFC needs the endorsement and support of the commanding officers, agency directors, and other leaders. Ask your Commanding Officer or Director to:
  - send a letter or memo endorsing the CFC
  - approve time for training, a group rally and solicitation
  - take part in the rally
  - make his/her pledge

## 5. Choose Individual or Group Solicitation

- Individual solicitation is more time consuming and places a greater burden on the Campaign Chair. Each person is contacted individually and told about the CFC. The pledge form is presented at that time. Individual solicitation can also occur after a rally. It is always necessary to make personal contact with those unable to attend the group meetings. (*See page 5 for details*)
- Group solicitation occurs at the conclusion of the rally, before employees leave. It is an effective and efficient use of solicitation time. The “Rally” provides an opportunity to leave distractions behind and focus attention on the CFC. You can expect 80 to 85 percent of those in attendance to turn their cards in before they leave. (Generally results in higher participation and larger gifts). (*See page 6 for details*).

## 6. Build the Spirit

- Supplies and resources are available to you and are explained later. Use them and your own ideas.
- Imagination and creativity make a campaign fun and successful.
- Consider the use of incentives.
- Promote the campaign throughout the workplace.
- *(See page 10 for details)*

## 7. Use Campaign Materials

- Posters, contributor's guides, report envelopes and pledge forms are all available.
- There is a wealth of information and access to downloads on the webpage.
- Call for films and speakers.
- *(See page 13 for a list of campaign resources)*

## 8. Hold a Rally

- Ask the Commanding Officer or Director to give opening remarks.
- Show the CFC film.
- Give each person a contributor's guide and pledge form.

## 9. Follow Through - Shoot for 100% Contact

- Contact those who missed the rally.
- Report your results immediately to your Point of Contact.

## 10. Say Thank You

- Ensure that all contributors are thanked.



**Need Help or Have Questions?** Call the Campaign Manager at 609-845-1010 ([vbrown@uwgpsnj.org](mailto:vbrown@uwgpsnj.org)), or the Campaign Director at 215-665-2965 ([rsmith@uwgpsnj.org](mailto:rsmith@uwgpsnj.org))

# ONE-ON-ONE SOLICITATION

## 1. Preparation

- Know the facts. Read the CFC information.
- Make your own pledge at the Supergiver level.
- Organize. Draw up a list of people you are to contact.
- Contact people you know best, first.
- Remember, most people who do not give to charity say they were never asked - ASK!

## 2. Introduction

- Make a positive and friendly introduction.
- Explain the purpose of your visit.
- Check for person's awareness of the Combined Federal Campaign.
- Quickly review the wide range of choices available to donors.
- Remember, many people you will be contacting have given to the CFC in the past.

## 3. Initiate the Request

- Presenting the Case for Giving to the CFC is an important step. You should stress the importance of giving to the campaign and tell why you should support it. Remember, this is one time when federal employees are asked to help those less fortunate in our community with a monetary gift.
- Stress payroll deduction and the wide range of choice available to the contributor. They may choose agencies at the local, national and/or international level. All eligible agencies are listed in the campaign contributor's guide and on the website, [www.cfc-eastpa-southnj.org](http://www.cfc-eastpa-southnj.org). Donors can designate their contribution to any agency listed in the charity list by using their **5-digit code**.
- You should explain the CFC Supergiver program. The Supergiver Program is designed to recognize individuals who give at higher levels to our campaign. The guideline is developed by federal employees in your area.

## 4. Answering Questions

- Answering questions about the CFC gives you the opportunity to tell potential contributors more about the CFC. Attempt to answer each question fairly and accurately. More importantly, avoid being argumentative.
- See the FAQ's on Page 11.
- If you need more information about the CFC, call the campaign manager at 609-845-1010 or the campaign director at 215-665-2965, or go to [www.opm.gov/cfc](http://www.opm.gov/cfc).

## 5. Ask For The Pledge

- Once you have reviewed the CFC materials with contributors and answered their questions, you are now ready to ask for their gift. Again, encourage them to use payroll deduction and become a CFC Supergiver.
- Collect the signed pledge form - avoid leaving the card.

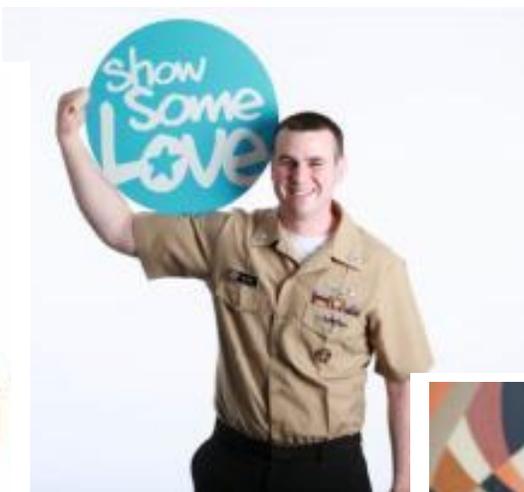
# GROUP SOLICITATION

## 1. Planning

- Schedule an adequate-sized meeting room.
- Prepare an attendance roster and schedule your people for specific meeting times.
- Invite your Commanding Officer or Director to attend each meeting.
- Promote the event, consider having refreshments available.
- Schedule the CFC film.
- Schedule a CFC speaker by calling the campaign manager; or find someone in your group who has a story to tell.
- Have pledge forms and the CFC contributor's guide ready for each person as they arrive.

## 2. Sample Agenda For Your Group Meetings

- Employees are greeted and given a CFC pledge form and contributor's guide.
- The Campaign Chair opens the meeting, outlines its purpose, explains the contributor's guide and pledge form, and introduces the agency director if she or he is present.
- The agency director talks briefly, endorsing the CFC and explaining the government's support of the campaign.
- An agency representative, an employee who has been helped, or an employee who has visited a participating agency, will tell their story.
- The CFC film is shown.
- The Campaign Chair asks for a pledge, emphasizing payroll deduction, and asks employees to complete and hand in their pledge forms before they leave.
- Closing remarks by the Campaign Chair:
  - a reminder about the campaign's closing date
  - offer to stay and answer questions
  - motivational comments
- Thank everyone.



# THE REPORT ENVELOPE

Eastern Pennsylvania and South Jersey Need Help? Call 215.665.2965



**COMBINED FEDERAL CAMPAIGN**  
1730 Benjamin Franklin Parkway  
Philadelphia, PA 19103-4284

## Coordinator's Report Envelope

Section I. Federal Agency Name / Department \_\_\_\_\_ ACCOUNT # \_\_\_\_\_

Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Coordinator's Name \_\_\_\_\_ Phone (\_\_\_\_\_) \_\_\_\_\_

Section II. Person Completing this Report (completes if you are not the official coordinator)  
 Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Phone (\_\_\_\_\_) \_\_\_\_\_ Date \_\_\_\_\_

Section III. Reporting  
 Summary of Keyperson's Report Envelopes Enclosed (Please limit the contents of each envelope to 50 Pledge Cards.)

Check One:  
 Partial Report  
 Final Report

	NUMBER OF GIVERS	TOTAL AMOUNT OF GIFTS	For CFC Use Only Amount of Confidential Gifts
CONFIDENTIAL			_____
CASH			_____
PAYROLL			_____
OTHER FUNDRAISING (Special events, etc.) Enclose all proceeds.			
<b>A. TOTAL THIS REPORT</b>			
<b>B. TOTAL PREVIOUSLY REPORTED</b>			
<b>C. TOTAL REPORTED TO DATE (A &amp; B)</b>			

NOTE: All Campaigns will be considered open until final report is submitted.

For PFCO Audit Only

Total number of forms enclosed in this envelope \_\_\_\_\_

	Enter	Verify	Transfer	Total \$
Date				
Initials				Control

PFCO Processing Manager Signature: \_\_\_\_\_

CFC-7

## Review Face of Envelope for Accuracy

- Complete Installation Information
  - Installation, Federal Agency/ Department Name and Address
  - Name of the Coordinator
  - Date
- Person Completing the Report
  - All Information is Required
- Reporting
  - Check off if this is a Partial or Final Report
  - Complete Sections for Confidential, Cash and Payroll Gifts

Do Not Exceed 50 Pledge Forms in each envelope.

Do Not Include Pledges Made Through Online Giving.

# THE PLEDGE CARD

00001



**2016 EASTERN PENNSYLVANIA AND SOUTH JERSEY CFC**  
1709 Benjamin Franklin Parkway, Philadelphia, PA 19103-1294

CFC Campaign No. **0751** City/State Code: **42 6540**

**ATTENTION PAYROLL OFFICES:**  
Use this number only to identify the local campaign.

PRINT NAME (LAST)	FIRST	MIDDLE INITIAL	CHECK (if applicable) <input type="checkbox"/> Civilian <input type="checkbox"/> Military	FEDERAL AGENCY AND OFFICE	SOCIAL SECURITY NUMBER/EMPLOYEE ID
WORK ADDRESS & ZIP CODE					WORK PHONE NUMBER ( )

CONTRIBUTION: Fill in the blank showing the amount of your payroll allotment, cash or check contribution. Write in the total of your annual contribution in the space provided.

ALLOTMENT SOURCE	AMOUNT	INTERVAL	TOTAL GIFT	CHARITY CODE	ANNUAL AMOUNT
MILITARY PAYROLL <small>Branch of Service?</small>		X 12 months	\$		
CIVILIAN PAYROLL		X 26 pay periods	\$		
CASH/CHECK <small>(make check payable to the Combined Federal Campaign)</small>	Check Number:	Cash/Check Amount:	\$		

CFC Organizations do not provide goods or services in whole or partial consideration for any contributions made to the organizations via this pledge card.

DESIGNATED GIFT: To designate one or more charities or federated groups, fill in the charity code(s) and dollar amounts above. Undesignated gifts are distributed among all organizations in proportion to their pledges.

**INFORMATION RELEASE (OPTIONAL)**

Any information you enter below will be released, along with your name, to the charity(ies) to which you made a pledge. Do not enter your work address or email.

Home Address \_\_\_\_\_

Personal Email Address \_\_\_\_\_

In addition to my contact information, I authorize the CFC to release the amount of my pledge to the charity(ies) I designated above.

**PAYROLL DEDUCTION AUTHORIZATION**

I hereby authorize any agency of the United States Government by which I may be employed during 2017 to deduct the amount(s) shown above from my pay each pay period during the calendar year 2017 starting with the first pay period that begins in January and ending with the last pay period that begins in December, and to pay the amounts so deducted to the Combined Federal Campaign shown above. I understand that this authorization may be revoked by me in writing at any time before it expires.

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

GPM FORM 1664 REV. MAY 2016

## Review Pledge Cards for Accuracy

1. Check that Name and Information is Complete and Legible
2. Check that Total Gift field matches Sum of Designations
3. Make Sure that Pledge Cards are Signed by the Donor
4. Submit Pledge Cards in Report Envelope (no more than 50 per envelope)
  - a. Keyworker submits top copy to payroll office\*
  - b. Second copy remains in envelope for submission to processing office
  - c. Third copy is donor's receipt

***\*Keyworker must submit payroll copies to their payroll office prior to the first pay period of 2017.***

## BROCHURE LISTINGS

5-Digit Code Number	Name of Agency	Phone Number
Website	EIN#Gov't Tax ID	Description of Agency's
Services.	Percentage of Overhead Cost	
Taxonomy Code	<i>(see p.2 of brochure)</i>	

12345	National Organization	(800)333-1234
<a href="http://www.cfc.org">www.cfc.org</a>	EIN#12-0000000	This organization helps
people in need.		10.0%
B, H, D		

1. Donor must use a 5-digit code number from the 2016 Agency Directory. The full local directory is available online at [www.cfc-eastpa-southnj.org](http://www.cfc-eastpa-southnj.org).
2. The Percentage of Overhead Cost is the percentage of the donor's gift that will be used for administrative costs to run the agency.
3. A Taxonomy Code (or Service Category) categorizes the type of services that the charity has to offer (*page 6 of the directory has the list of codes and descriptions*).
4. Donors can use the EIN (Employer Identification Number) to research a charity on various websites, such as [guidestar.org](http://guidestar.org) or [irs.gov](http://irs.gov).

### **CFC UNIVERSAL GIVING**

**What is it?** Universal Giving (UG) is a new donation option that permits donors to pledge to any CFC participating charity no matter where the donor or the charity is geographically located. Thus for those donors who wish to stay involved with a favored charity or charities outside the area, they may now do so. For example, if you work in New Jersey and you want to donate to a Brooklyn, New York food pantry (that is participating in the local CFC), you can now use the Universal Code Number for this agency.

**How does Universal Giving work?** The list of UG charities can only be accessed online. UG charities are too numerous to be listed in the paper charity listing. If you wish to donate to a local charity outside our campaign territory, log in to any of our online giving tools at [www.cfc-eastpa-southnj.org](http://www.cfc-eastpa-southnj.org) to search for the charity you want to support. Enter the charity's five-digit code on your paper pledge form or the online donation tool of your choice: CFC Nexus, CFC Employee Express or myPay. It's that easy!

## PROMOTING YOUR CAMPAIGN

Listed below are just a few ideas on promoting your campaign. Remember to make your campaign as much fun as possible. Involve as many people as you can from your organization in planning and executing your campaign.

- Run executives' campaign first in order to start the momentum and set the pace for your regular employee campaign. If possible, announce the results at your kickoff.
- Send weekly reminders and messages via e-mail or intranet.
- Publish information and update on your Website and/or Facebook page
- Publish articles in the employee newsletter.
- Post information on agency bulletin boards.
- Publish a calendar of campaign events.
- Hang CFC posters, banners or thermometers in heavy traffic areas.
- Announce information on the loudspeaker.
- Send memos or letters from the agency director to all employees.
- Create an incentive program, using gifts or services donated by fellow employees as prizes.
- Put flyers on car windshields.
- Place door hangers on office doorknobs.
- Decorate the elevators, stairwells, and inside of restroom stall doors.
- Ask department heads to talk about the campaign at staff meetings.



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## **COMMON QUESTIONS CONCERNING THE COMBINED FEDERAL CAMPAIGN**

### ***Who runs the Combined Federal Campaign?***

The Office of Personnel Management (OPM) is responsible for the CFC throughout the country. OPM sets forth specific regulations which regulate the campaign. The Local Federal Coordinating Committee, a committee of local federal employees, is charged with conducting the campaign among federal employees in Eastern Pennsylvania and South Jersey.

### ***How do charities become part of the Combined Federal Campaign?***

Most charities that appear in the campaign charity list are admitted by OPM. A local committee of federal employees decides which local agencies are qualified to become a part of the campaign. All of the charities must meet specific guidelines as determined by OPM.

### ***Why do charities love the CFC?***

Charities love the CFC and rely on donations from the campaign - it is a reliable source of revenue all year long and an inexpensive way to raise money to continue their services.

### ***In the CFC charity list, what are the percentages behind each agency?***

The percentages indicate the administration and fundraising costs for that particular agency.

### ***When will payroll deductions (allotments) start?***

All payroll deductions start in January, 2017.

### ***What is the minimum amount I may give through payroll deduction?***

The minimum for civilians is \$1.00 per pay. For military personnel the minimum is \$2.00 per month. There is no minimum on check or cash contributions.

### ***The Combined Federal Campaign fundraising costs are too high.***

The CFC is among the most efficient fundraising organizations around. In last year's campaign, **90¢ of every dollar contributed to the CFC went to human service agencies.**

### ***I want to be able to decide where my money goes.***

This is not a problem. In fact, the CFC is a donor-driven campaign. All contributors are encouraged to designate their gifts to agencies that are listed in the campaign charity list by using the **5-digit code**.

### ***How do I know that my money really gets to where I designate?***

The organization that manages the CFC must, by regulation, forward your designation to the agency you have chosen. By filling out the contribution acknowledgement portion of the pledge form, the agency(ies) you designate will forward a thank-you letter to you.

***I do not like a specific agency that is listed in the campaign charity list. How can I be assured that my donation will not be sent to them?***

The best way to make sure that your contribution goes to an organization that you approve of is to designate your contribution to a specific charity listed in the campaign charity list by using their 5-digit code.

***The Supergiver guideline is too high.***

No one can, or should, tell you how much to give. This is a personal decision only you can make. This guideline was developed by a group of federal employees, and is only a tool to help you decide. However, the CFC is the only charitable campaign conducted at the federal workplace and, therefore, gives you an opportunity to help those less fortunate than yourself.

***I cannot afford it.***

Payroll deduction lets you spread out your gift over the year. For the cost of a bottle of water or a can soda once a week, you can change someone's life.

The agencies supported by the CFC are also struggling with rising costs and increased demand for their services. These agencies perform services both in good times and bad times. When people need help, they are there to serve.

## WHAT YOUR CONTRIBUTION CAN PROVIDE

See “What Your Dollar Can Buy” at [www.cfc-eastpa-southnj.org](http://www.cfc-eastpa-southnj.org)

**\$2.00 per pay period provides:**

- Handbooks to train volunteers to speak up for abused and neglected children in court
- Food for 2 shelter dogs for a month
- Food for 10 people a day

**\$4.00 per pay period provides:**

- 136 meals to low-income individuals
- 72 meals delivered to homebound elderly
- Helps a veteran's child attend college

**\$6.00 per pay provides:**

- Sending a child to camp for 4 days
- 5 nights of shelter for a homeless person
- 497 meals delivered to low-income elderly people

**\$10.00 per pay period provides:**

- A high-quality child care experience for a child, preparing him or her for school
- 2 days of care for a terminally-ill individual
- Baby formula for 52 low-income infants



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# CAMPAIGN RESOURCES

## 1. CFC Videos (DVD format)

- A CFC Video is available on our website to show at your group meeting

## 2. Speakers

- Speakers are available to attend your agency's group meeting. They tell personal, convincing stories, helping prospective donors better understand the importance of their gifts and how lives are impacted. To arrange for a speaker, contact the campaign manager.

## 1. Posters

- CFC posters are available and should be displayed wherever possible.

## 2. The CFC Charity list

- The CFC Charity list is a complete list of federations and agencies that benefit through CFC contributions and includes short descriptions about each organization. The charity list can be used as a reference guide for services throughout the year. It is expected that every person will have an opportunity to review the charity list and keep it if they choose. The entire list is available online at [www.cfc-eastpa-southnj.org](http://www.cfc-eastpa-southnj.org).

## 3. Pledge Forms

- CFC Pledge Forms should be distributed to each employee along with the CFC Contributor's guide during group meetings or one-on-one solicitation. The forms provide an easy means for givers to commit their support, either by a deduction from each paycheck or a cash/personal check contribution.

Donors should be directed not to rely on prior-year pledge forms or lists but to consult the new charity list for the appropriate charity code. Donors should also be advised they must use the **five-digit code** in order to ensure their pledge is given to the charity they have designated.

## 4. Report Envelopes

- Report envelopes should be used when turning in cash and pledge forms to your Campaign Coordinator or point of contact. Place no more than 50 pledge cards in each envelope.

## 5. CFC Website

- The local CFC Website - [www.cfc-eastpa-southnj.org](http://www.cfc-eastpa-southnj.org) contain a wealth of information regarding the CFC, including this guide, links to the CFC videos, downloadable files, a search function of all participating organizations and new this year, an **Impact Calculator** that will show you the impact your gift will have just by entering your per-pay allotment. Also visit [www.cfctoday.org](http://www.cfctoday.org) for additional information and downloadable materials.

## FEDERAL EMPLOYEES HAVE CHOICE IN PLEDGING....



**CFC NEXUS** is an online E-Pledging system designed specifically for the CFC community. All employees are eligible to contribute through the CFC Nexus system. A one-time sign-in is required for all participants. To access CFC Nexus log in to our website and follow the link or go to [www.cfcnexus.com/\\_sepalehighcfc](http://www.cfcnexus.com/_sepalehighcfc).



**CFC-EEX (Employee Express)** offers employees in specific agencies the choice of making a CFC payroll deduction pledge on-line through CFC-EEX.

Employee Express is a convenient, user-friendly automated system that gives employees direct control over key payroll and personnel information without having to use forms or visit a personnel office.

CFC-EEX is not mandatory for CFC pledges. CFC-EEX is another option for the Federal donor in agencies using EEX (if your agency has signed up)!



The Department of Defense DFAS (Defense Finance and Accounting Service) [myPay Website](#) allows US Military personnel and their families to manage their pay information, leave and earning statements, W-2s and enter their CFC pledge amount. **The campaign code is 0751**. A list of agency codes is available on our website:

**[www.cfc-eastpa-southnj.org](http://www.cfc-eastpa-southnj.org)**

As we gear up for the 2016 Campaign, visit our [Facebook page](#) a fun and easy resource where you'll get real-time updates and access to materials. "Like" our page to become a part of our community - where you can share, learn and start getting excited about running a successful campaign.