

CFC of South Puget Sound

2016 Training

Kelvin Ceasar (KC)

Mission of the CFC

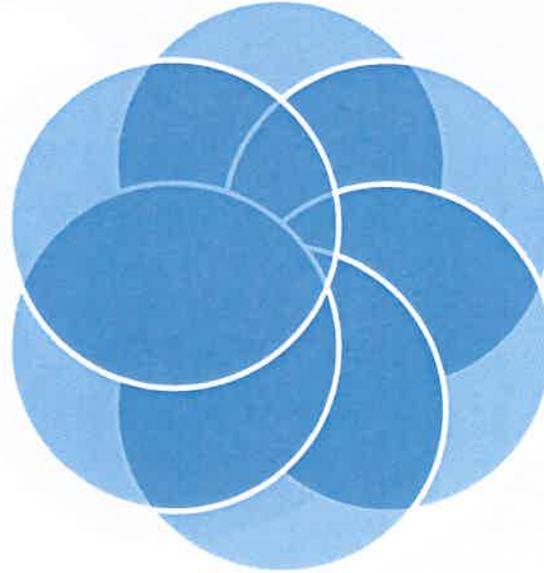
The mission of the Combined Federal Campaign (CFC) is to support and to promote philanthropy through a program that is employee-focused, cost-efficient and effective in providing all Federal employees the opportunity to improve the quality of life for all.

CFC History

Began in the 1960's by
President Kennedy

The campaign runs
from 1 Sep – 15 Dec

National Campaign
with local oversight



Only authorized
solicitation by civilian
nonprofits of Federal
employees in the
workplace

Voluntary
participation

Donor designated

Overview

- Nationally, the Office of Personal Management (OPM) establishes policies
- The Local Federal Coordinating Committee (LFCC) are volunteers that serve as a “Board of Directors” for our local CFC
 - JBLM Base Cmdr, COL Morgan, 2016 LFCC Chair
 - LTG Stephen Lanza, Honorary Chair
 - The LFCC ensures local charities admitted to the donor guide meet OPM requirements
 - Provide fiscal oversight for our local campaign

Keyworker Job Description

Distribute: CFC Booklet

You'll give **one** for every **three** employees assigned to you or direct them to our Website: www.cfcgive.org where they can search charities and give online.

- Explain the reasons for the Combined Federal Campaign, the needs of participating charities, and the many advantages offered by the campaign to federal employees.
- Personally contact and discuss the importance of the Campaign with each employee; plan follow up visits to employees on vacation, TAD or sick leave.

WE ENCOURAGE YOU TO:

- Give everyone a chance to contribute and share in this community project.
- Promote **Payroll Deduction and Online Giving** as the main method of giving.
- Emphasize that giving is truly voluntary and confidential.
- Handle all pledge forms and campaign funds responsibly and with confidentiality.
- Promote the Campaign through the display of posters and other creative means of publicity.
- Say "thank you" many times.

SIX STEPS

1. CONFIRM AGENCY HEAD SUPPORT
2. SET THE CAMPAIGN GOAL
3. PROMOTE AND EDUCATE
4. ASK FOR THE PLEDGE
5. REPORT CAMPAIGN RESULTS
6. SAY THANKS, AGAIN AND AGAIN

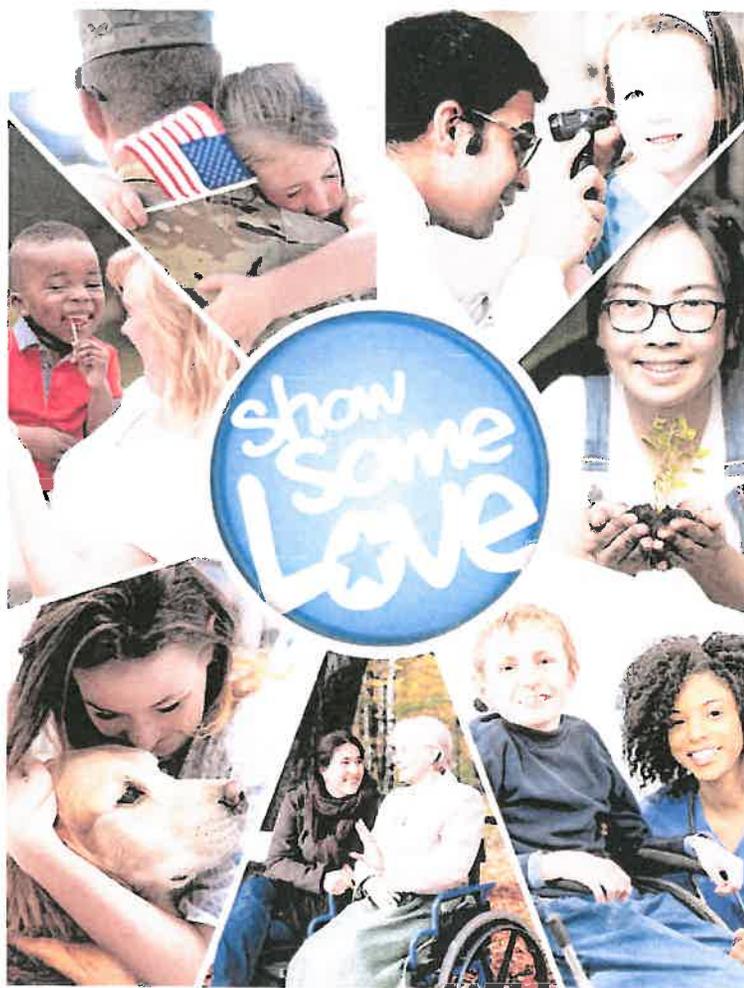
**TO A SUCCESSFUL
CAMPAIGN**

Remember!

The #1 Reason people don't give is because they aren't asked!

Donor Recognition

- **Eagle club:** Donors contributing at \$1,200 and above will receive an eagle statue, and Commander's Certificate from LTG Lanza, Commanding General JBLM
- **Mt. Rainier Giver:** Donor contributions of \$600-\$1,199 receive a CFC challenge coin and Commander's Certificate from LTG Lanza, Commanding General JBLM



Sample Charity Listing

11405 ABC Charity

(Alpha-Charity) (800) 555-5555 www.abccharity.org

EIN#12-3456789 ABC Charity attacks the causes of hunger and poverty by promoting effective and innovative community-based solutions that create self-reliance, economic justice, and food security. 15.8% P.S.K

www.charitynavigator.com

Resource Guide Cont.

CFC of South Puget Sound

www.cfcgive.org

Local Section features charities that are
within the South Puget Sound area

CIVILIAN PAYROLL DEDUCTION



Combined Federal Campaign of South Puget Sound
 PO Box 2215 - Tacoma, WA 98401-2215
 www.cfcgwa.org

CFC Campaign Number **0925**
 City/State Code **53 2230**

ATTENTION PAYROLL OFFICES:
 Only use this number to identify the local campaign.

SSN Required

000022

Enter Last Name, First Name, and MI: **DOE, JOHN Q.**

Rank: **BLANK**

Check (if applicable):
 Civilian
 Military

Federal Agency and Office: **VA**

SSN/Employee ID: **533 00 1234**

Work Address & Zip Code: **9600 Veteran's Drive SW, Tacoma, WA 98493**

Work Phone Number: **(253)967-XXXX**

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
MILITARY PAYROLL Branch of Service?	BLANK	X 12 months	BLANK
Civilian Payroll	\$ 10.00	X 25 pay periods	\$ 260.00

Charity Code	Annual Amount
9 2486	\$ 200
9 3094	\$ 60
	\$
	\$
	\$

Check / Cash Amt.: \$ **BLANK** Check Number: _____

(make check payable to the Combined Federal Campaign)

Date of Contribution: **BLANK**

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 to one or more charities or federated groups, fill in the charity code(s) and dollar amounts above.

RECOGNITION OPTIONS

Release Pledge Amount Box must be checked
 (Every designated charity will be notified of your gift amount.)

In order to protect your information and maintain confidentiality, each field below requires two steps. Your information will NOT be released unless the field is filled in AND the box is checked. By completing the line(s) below AND checking the box, your name along with the corresponding information will be released to your designated charities.

Home Address: **123 Main Street,** Box must be checked
Tacoma, WA 98402

Home E-mail: **John.doe@us.army.mil** Box must be checked

PAYROLL DEDUCTION AUTHORIZATION

I hereby authorize any agency of the United States Government by which I may be employed during 2010 to deduct the amount(s) shown above from my pay each pay period during the calendar year 2010 starting with the first pay period that begins in January and ending with the last pay period that begins in December, and to vary the amount(s) deducted as the Combined Federal Campaign shows above, and my authorization may be revoked by me in writing at any time before it expires.

Signature: **John Q Doe** Date: **30 SEP 2010**

See reverse side for information on volunteer opportunities in your community.

PLEASE USE BALLPEN & WRITE FIRMLY

COPY #1 - PAYROLL OFFICE

- Turn in top two copies (White & Yellow), third copy (Pink) goes to individual
- Ensure **PAYROLL OFFICE INCLUDED!**
- **\$1 minimum per payperiod**

SIGNATURE REQUIRED

OPM 1054
 Revised January 2010

MILITARY/CIVILIAN CASH OR CHECK DONATION



Combined Federal Campaign of South Puget Sound
PO Box 2215, Tacoma, WA 98401-2215
www.cfcgwa.org

CFC Campaign Number **0925** ATTENTION PAYROLL OFFICES:
City/State Code **53 2230** Only use this number to identify the local campaign.

000022

Enter Last Name, First Name, and MI
DOE, JOHN Q.

Rank
CIV

Check (if applicable): Federal Agency and Office
 Civilian
 Military **VA**

SSN/ Employee ID
BLANK

Work Address & Zip Code

9600 Veteran's Drive SW, Tacoma, WA 98493

Work Phone Number

(253)967-XXXX

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
MILITARY PAYROLL Branch of Service?	BLANK	X 12 months	BLANK
Civilian Payroll	BLANK	X 28 pay periods	BLANK
Check / Cash Amt.: \$	120	Check Number:	756

Charity Code	Annual Amount
9 2 4 8 6	\$ 100
9 3 0 9 4	\$ 20
	\$
	\$
	\$

(make check payable to the Combined Federal Campaign)

Date of Contribution: **30 Sept 2010**

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 to one or more charities or federated groups, fill in the charity code(s) and dollar amounts above.

RECOGNITION OPTIONS

Release Pledge Amount Box must be checked
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In order to protect your information and maintain confidentiality, each field below requires two steps. Your information will NOT be released unless the field is filled in AND the box is checked. By completing the line(s) below AND checking the box, your name along with the corresponding information will be released to your designated charities.

Home Address **123 Main Street,** Box must be checked

Tacoma, WA 98402

Home E-mail **John.doe@us.army.mil** Box must be checked

PAYROLL DEDUCTION AUTHORIZATION

I hereby authorize any agency of the United States Government by which I may be employed during 2011 to deduct the amount(s) shown above from my pay each pay period during the calendar year 2011 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

BLANK

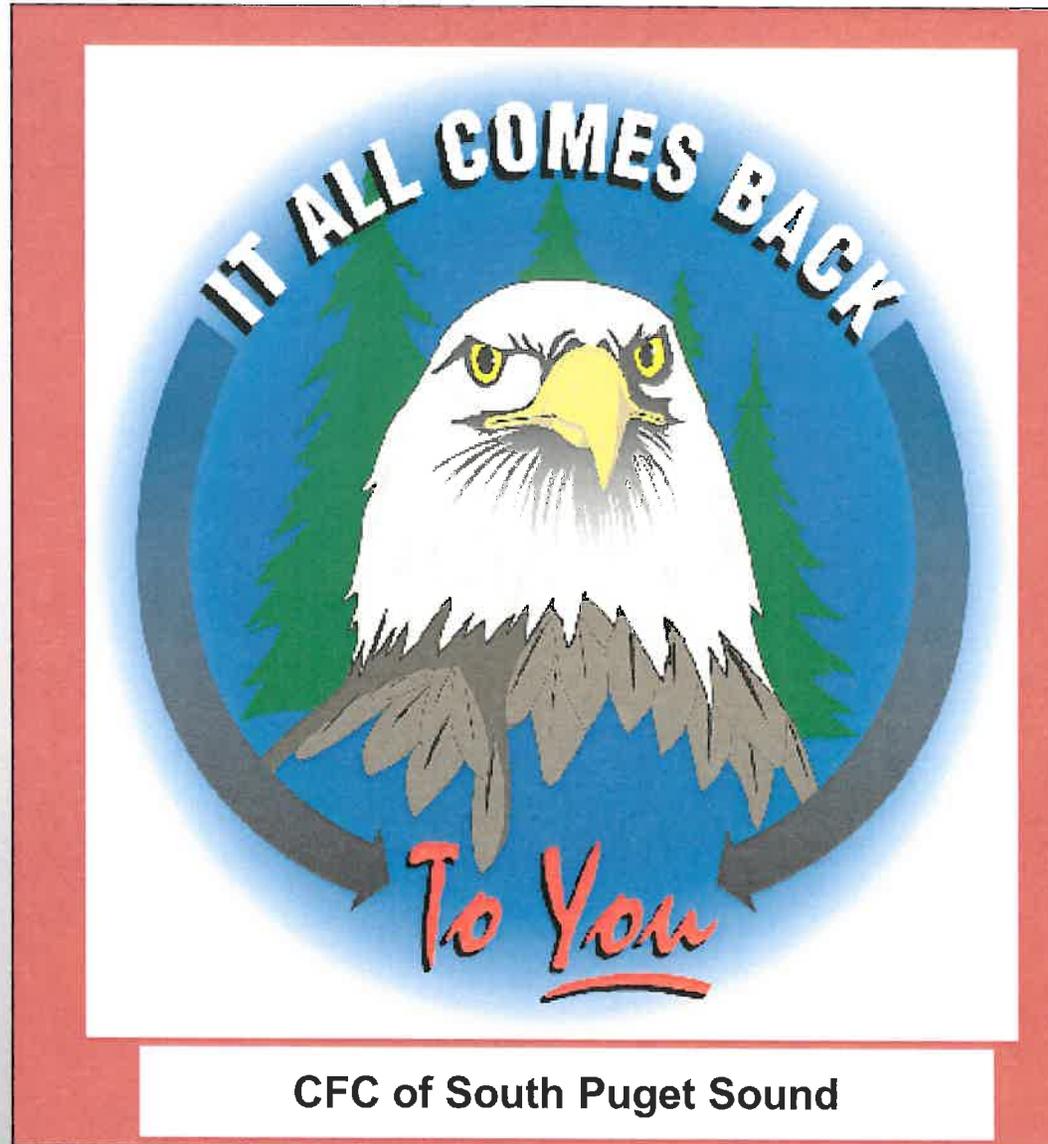
Date

See reverse side for information on volunteer opportunities and your confidentiality.

PLEASE USE BALL POINT PEN & WRITE FIRMLY

COPY #1 - PAYROLL OFFICE

- Turn in top two copies, third (pink) goes to individual
- Ensure money/checks are paper-clipped to pledge forms, not stapled
- Never leave pledge forms unsecure



CFC of South Puget Sound

Online Giving 2 Options:
www.cfcgive.org or MyPay

Credit Card Gifts

- CFC of South Puget Sound is able to process one time credit card gifts online. Register as an online donor same as payroll pledging.
- Credit card gifts are an excellent option for those federal employees who are unable to set up allotments through payroll.

Turn in procedures

Pledges received from donors should be turned in on a weekly basis to the designated project officer for their unit for immediate processing. This enhances donor confidence in the CFC process. Key workers 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 and matches the amount designated to the charities.
- 3) Verifying the use of five digit charity codes; none start with zero.

Turn in procedures cont.

- 5) Separating pledge forms for CFC Progress Report and turn-in:
 - a) White & Yellow Copies are separated into cash, check, and payroll deduction.
 - b) Cash should be secured to the white copy of each pledge **DO NOT STAPLE CASH TO THE PLEDGE FORMS.**
 - c) Payroll Deductions are signed, and include a SSN/EIN. The white copies will be submitted by LE/Project Officer to Finance; yellow copy with CFC Progress Report to CFC office (for processing). **(max 50 pledge cards per report)**
 - d) **The Pink copies (Copy 3) are for the donor for tax records – return to them if turned in.**

Turn in procedures cont.

- 6) The total amount and number of donors for each Cash, Check, Payroll Deduction donation is recorded on the CFC Progress Report
- 7) **If a confidential contribution is received, it SHOULD remain sealed until processed by the PCFO (CFC Staff). Simply indicate the number of confidential donations (if any) on top of the Progress Report it is submitted with. Do not open.**
- 8) Sign the report envelop where indicated. Turn in the forms in the report envelop to the assigned project officer.
- 9) **DO NOT DROP OFF THE REPORT/PLEDGES AND LEAVE IT UNATTENDED.** The assigned project officer must verify content and sign it in the presence of the key worker to relieve the key worker of responsibility for the report and pledge contents. Donor gifts and awards will be routed through the project officer at the end of the campaign

CFC REPORT ENVELOPE



COMBINED FEDERAL CAMPAIGN

AGENCY
CFC NO. _____

() Partial Report
() Final Report

Date: _____

Keyworker's Name _____

Installation or Agency _____

Division or Unit _____

Mailing Address _____

City & State _____ Zip Code _____

Keyworker's Duty Phone Number _____

Number of Employees Assigned to Solicit _____

Name of CFC Project Officer/Coordinator _____

Contributions Enclosed in this Kit:

Number by Payroll Deduction _____ Amount \$ _____
 Number by Cash _____ Amount \$ _____
 Number by Check _____ Amount \$ _____
 Special Events _____ Amount \$ _____
 Number in Sealed Envelope _____ Amount \$ XXXXXX
Known Total \$ _____

Total Number Contributions _____

DO NOT WRITE IN THIS SPACE

(For Use by CFC Accounting Agents)

	Number	Amount
Payroll Deductions	_____	\$ _____
Cash Contributions	_____	\$ _____
Check Contributions	_____	\$ _____
Confidential Contributions	_____	\$ _____
TOTAL	_____	\$ _____

ROLE OF A KEYWORKER

You are the key to success of the CFC. Your positive attitude and enthusiasm will help assure a favorable response from the fellow employees you have been assigned to solicit. You are the official representative of the many worthy agencies that depend on the CFC to provide funds to help people in need in our community, elsewhere in the nation and around the world. Thank you for accepting this important assignment.

INSTRUCTIONS:

SUGGESTED CAMPAIGN PROCEDURES:

1. PUT UP CFC POSTERS and keep them displayed throughout the campaign.
2. HAND OUT FORMS. Give each person on your list a set of pledge forms and a contributor's brochure. Encourage giving by payroll deduction. It makes giving easier than a one time cash gift.
3. SHOW CFC FILM. Check with your project officer or agency head regarding a group meeting or rally to kick-off the campaign and show the CFC film.
4. SET THE PACE by giving generously yourself before you collect the pledges of your fellow employees.
5. ENCOURAGE DESIGNATIONS. Urge contributors to designate the federations or agencies of their choice to receive their contribution.
6. COLLECT PLEDGES AND CASH. For those giving by payroll deduction, collect the original signed authorization form (Copy #1) and the attached copy for the central receipt point (Copy #2). For cash

contributors, collect Copy #2 and the cash, check or money order. Contributors retain Copy #3 for their tax records.

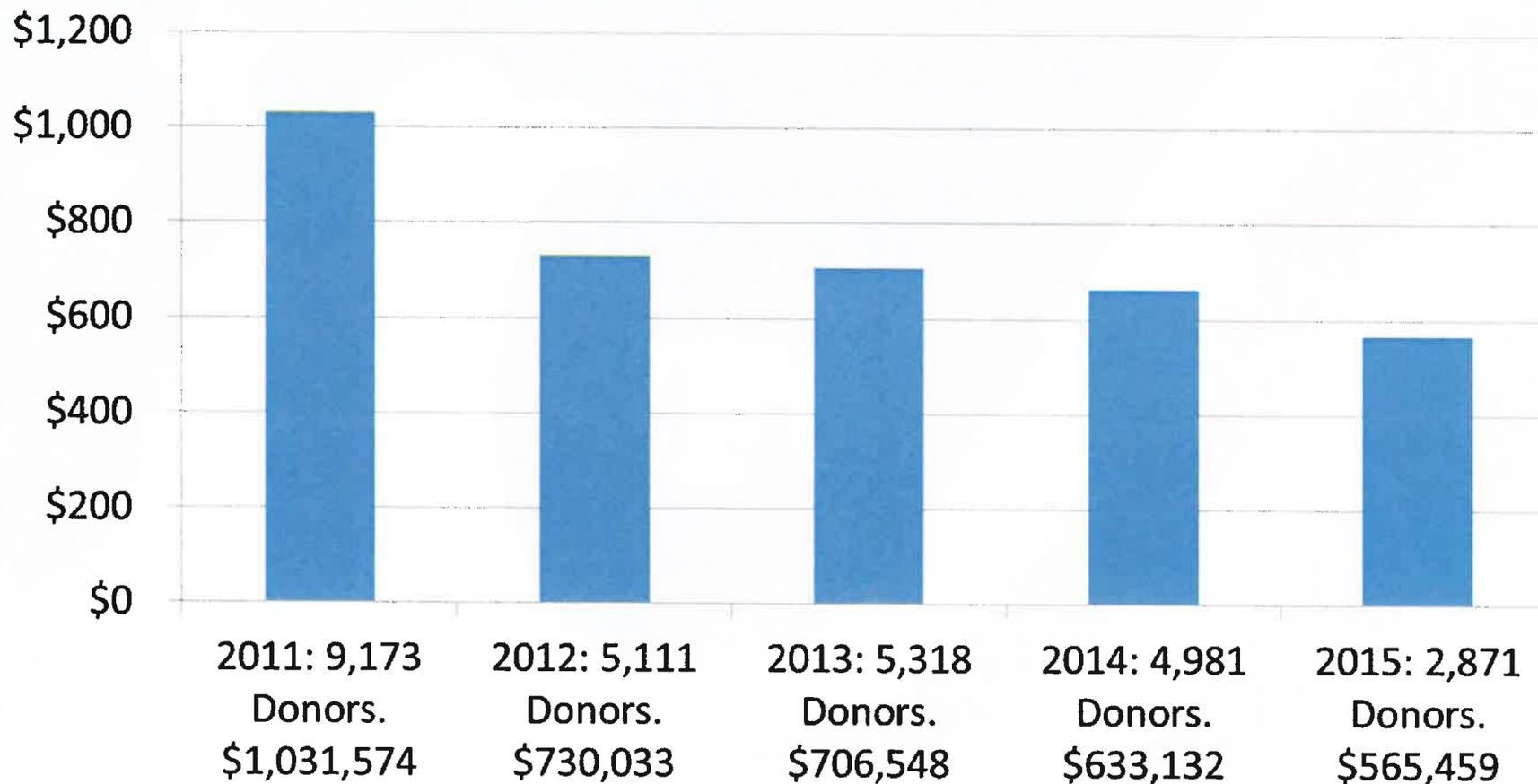
7. FOLLOW UP. Strive for maximum participation. Follow up on those on leave or travel status.
8. CHECK RETURNS FOR ACCURACY. Examine each pledge form for legibility, accuracy and completion. Resolve any apparent errors with the contributor.
9. FILL IN THIS REPORT. Please summarize all contributions returned in this kit in space provided above. Use the reverse side of this envelope to list names of those contributors who qualify for awards.
10. TURN IN THIS KIT to the CFC Project Officer for your agency who will then forward the Payroll Authorization Forms to your agency's payroll office and the remaining copies of the pledge forms and the cash contributions to the Central Receipt & Accounting Point.

Handy CFC Resource: www.cfcgive.org

- Tools and Resources
 - Message from the Chair
 - FAQs
 - DONATE ONLINE
 - Charity Search Engine
-

2011-2015 Recap

Lewis, McChord, Madigan



Final Thoughts!

- Remember that you are giving through CFC not to the CFC
- UTILIZE CHARITIES!
- Together We can make a Difference