

**2016**

**Keyworker Training Manual**



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## **Table of Contents**

<b>Keyworker Responsibilities.....</b>	<b>2</b>
<b>Background of CFC.....</b>	<b>4</b>
<b>Designation Options.....</b>	<b>5</b>
<b>CFC Administrative Costs.....</b>	<b>6</b>
<b>Donor Recognition.....</b>	<b>6</b>
<b>Regulations.....</b>	<b>7</b>
<b>Donor Questions.....</b>	<b>7</b>
<b>Campaign Materials.....</b>	<b>10</b>

## **KEYWORKER RESPONSIBILITIES**

It is a well-proven fact that, within a charitable solicitation effort, PEOPLE GIVE TO PEOPLE. Your visible commitment to the Combined Federal Campaign (CFC) this fall will encourage your co-workers to support the campaign. Your credibility and leadership will go a long way toward the achievement of your goal.

Please use this training manual as a resource and feel free to call the CFC Office (at United Way) at (701) 775-8661 if you have additional questions or concerns. We welcome your feedback and comments on the management of the campaign!

Your responsibility as a Keyworker is to work with a Project Officer/Local Federal Coordinating Committee (LFCC) Loaned Executive to manage a timely, effective, and successful CFC in your unit or office. This manual will review main campaign issues and will prepare you for your part of a quality campaign.

### **THE KEYWORKER JOB**

Keyworkers are responsible for the following activities:

\*ATTENDING TRAINING and visiting CFC agencies, if such tours are arranged in your agency--ask questions to prepare yourself for the Keyworker position.

\*PLAN AND SCHEDULE GROUP MEETINGS, distribute and collect pledge forms.

\*PUBLICIZING the campaign as a whole and publicizing group meetings. BUILDING ENTHUSIASM for CFC within your agency. Ensuring attendance at group meetings.

\*ASSISTING IN GROUP SOLICITATION AND PERSONAL FOLLOW-UP for each employee in your agency.

\*MAKING PERSONAL CONTACT with all employees, especially those who cannot attend group meetings.

\*TURNING IN PLEDGE FORMS, CASH, AND CHECKS to your Project Officer/LFCC Loaned Executive using the Keyworker envelopes.

\*THANKING donors and sharing campaign results.

## **WHERE DO I START WITH MY KEYWORKER RESPONSIBILITIES?**

### **STEP ONE: LEARN THE FACTS ABOUT THE CFC**

Read the CFC Charity List and review the pledge form thoroughly. You'll be giving one to each employee -- so know what campaign materials say before you have to answer questions. Additional information is provided in this Keyworker training manual. Knowing the facts will help you feel more confident and you'll be more effective in asking for contributions.

### **STEP TWO: MAKE YOUR OWN CONTRIBUTION**

We hope you will find one or more agencies you wish to support in the CFC Charity List and that you will be as generous as possible through the payroll deduction option. Your contribution says "I believe in CFC and I've already made my gift before asking for yours." When you make your commitment first, it's easier to ask others to make theirs.

### **STEP THREE: ASK OTHER PEOPLE TO GIVE**

All you need are CFC Charity Lists and pledge forms. Please personalize the pledge forms before handing them out. Fellow employees realize that you care enough to spend extra time to facilitate their participation. It will help you keep track of people you've contacted and heard from. PEOPLE GIVE TO PEOPLE. Take time to personally ask for the support of your co-workers.

DO utilize group meetings whenever possible. They are, by far, the most effective (and easiest) way to solicit fellow employees (more about group meetings later). DO ask person-to-person and face-to-face..... that's how you personalize the campaign for every employee. Please emphasize that agencies participating in CFC are here to help all of us. These agencies support federal employees as well as others. Remember that every question posed by a co-worker provides an opportunity for you to talk about the positive aspects of CFC.

### **STEP FOUR: TURN IN THE MONEY AND PLEDGES**

This Keyworker training manual includes step-by-step instructions. Sit down with the Project Officer/LFCC Loaned Executive and verify the contents of your Keyworker envelope with him/her before signing the envelope.

**STEP FIVE:           THANK YOUR CO-WORKERS FOR THEIR SUPPORT**

Be certain that donors receive the "Thank You" copies of their pledge forms. (The donor recognition item program was discontinued in 2010.)

**WHAT IS THE CFC?**

The CFC is a once-a-year voluntary fund-raising effort authorized in 1961 by Executive Order of President Kennedy. The CFC affords Federal civilian employees, Postal Service employees and members of the uniformed services an opportunity to contribute to local, national and international human health and welfare organizations. The CFC is the only charitable campaign authorized to conduct federal on-the-job solicitation and to utilize payroll deductions. CFC is conducted in accordance with regulations issued by the U.S. Office of Personnel Management in Washington, D.C.

**WHO DOES THE CFC SUPPORT?**

Thousands of needy individuals in the Red River Valley area, throughout our country, and around the world are supported each year through the CFC. Donors decide where their own contributions will make a difference. 2,715 human service agencies will be listed in the 2016 CFC Charity Listing. Again in 2016, the implementation of "Universal Giving" will allow any local donor to choose from 19,682 organizations that have been accepted locally in other CFC regions.

**HOW DO AGENCIES GET IN THE CFC CHARITY LISTING?**

All agencies listed in the CFC Charity List applied to CFC and met the basic criteria established by the federal regulations which govern Combined Federal Campaign.

National and international agencies, listed in the first and second parts of the printed Charity List respectively, applied to the Office of Personnel Management in Washington, DC, in January of 2016 and were accepted for inclusion in all local CFC directories. Local agencies, in the third section of the guide, applied to CFC locally last March and were reviewed and accepted by the Local Federal Coordinating Committee. Agencies included within the online Universal Giving list were reviewed and accepted by the LFCCs in their own local campaign region.

All participating agencies must provide the following information as part of

their application. All of this information is held in the CFC files and is available to the public upon written request.

- \* Proof of "501 c (3)" (not-for-profit) status with the Internal Revenue Service.
- \* Copy of the latest IRS 990 Annual Report on the agency's financial practices.
- \* If the annual budget is over \$100,000, a certified independent audit of the financial records is required.
- \* Agencies must prove to the committee's satisfaction that they provide a health and welfare benefit.

The agency application period is open each March and applications may be obtained by calling the LFCC. Federal employees are encouraged to share this information with their favorite charities so that they may apply to future campaigns.

It is important to all of us at CFC that you understand the issues raised on these next two pages--they represent the heart of CFC and address many questions that will be raised by prospective donors. Please take time to read these figures and explanations carefully and CALL THE CFC OFFICE AT (701) 775-8661 if you have further questions or if you need more information to answer a fellow employee's questions.

### **DONOR DESIGNATION IS THE FOUNDATION OF THE CFC CAMPAIGN!!**

Donor designation is the foundation of the CFC campaign and the money goes where the donor designates. In 2016, donors are offered the opportunity to direct their contributions to agencies listed within the local CFC Charity List and OPM's Universal Giving list. Donors have the opportunity to choose among more than twenty-two thousand not-for profit organizations.

The most important message to donors is that their contribution goes only where they designate it.

Additionally, in 2016, donors that wish their contribution to be distributed proportionately to all international organizations that receive designated gifts during the 2016 campaign may do so by recording the following code letters:

**11111** I request that my gift be shared by all agencies listed in the "International" section of the CFC Charity List in the same proportion that they received designations.

### **UNDESIGNATED FUNDS**

Even if a donor chooses not to designate to a specific agency or federation, his/her contribution will still be gratefully accepted and utilized by many agencies. These undesignated funds will be distributed in the same proportion that all agencies received designations.

In 2016, donors may choose among 22,397 agencies and are strongly urged to actively choose one or more agencies from the list that they wish to support. Many agencies in the 2015 campaign received nothing from the CFC of the Red River Valley, because no local area Federal employee designated to them. Others, which enjoy good name recognition and support from among federal employees, received many thousands of dollars from CFC donors in the Red River Valley area.

### **WHERE THE MONEY IS DESIGNATED IS WHERE IT GOES?**

The most important message to pass on to donors is that their contribution goes where they designate it ... none of their money will go to agencies they did not designate, either directly or through general designation options.

### **ADMINISTRATIVE COSTS OF CFC**

In the 2015 campaign, campaign costs were \$31,589, 17.1% of the campaign results. These costs covered printing of materials, management fee, an independent audit of CFC's books, recognition materials, office supplies, etc.. Administrative costs of the 2016 campaign are budgeted at \$32,088.

### **DONOR RECOGNITION ITEMS**

The donor recognition item program was suspended in 2010. It is important that any feedback regarding the elimination of the recognition program be reported to the Local Federal Coordinating Committee.

### **PROHIBITIONS**

The Office of Personnel Management wrote some clear prohibitions into the

regulations which govern CFC:

1. personal dollar goals are not permitted.
2. setting 100% participation goals is prohibited.
3. solicitation by supervisors is prohibited.
4. do not display lists of contributors or non-contributors. The information you collect is confidential.
5. no coercion or "arm twisting".
6. do not promote one agency over another--let the contributor choose the agencies which will receive his/her gift.

The Office of Personnel Management encourages you to:

1. give each person a chance to contribute and share in this important nation-wide project.
2. promote Payroll Deduction.
3. promote giving at a suggested level – possibly an hour's pay per month.
4. promote the Campaign--display posters, publicize group meetings--have fun with CFC.
5. call the CFC Office at (701) 775-8661 if you have questions which cannot be answered by the Project Officer.

## **QUESTIONS YOU MAY BE ASKED**

### **WHAT IS THE DURATION OF MY PAYROLL DEDUCTION AND WHEN DOES IT BEGIN?**

Deductions will start in January, 2017 and will continue through December, 2017.

### **MUST I SIGN ANOTHER AUTHORIZATION FORM FOR THIS YEARS PLEDGE?**

Yes. A new form must be signed every year, even for renewals.

### **CAN I STOP MY PAYROLL DEDUCTION AUTHORIZATION?**

Yes. The authorization may be revoked, in writing, at any time, with your payroll office. You have the right to stop your pledge at any time, for any reason, but we strongly encourage you to honor your commitment to CFC and to your chosen agencies.

### **ARE CONTRIBUTIONS TAX-DEDUCTIBLE?**

Yes, within the tax laws. Consult with your accountant or tax advisor.

### **WHO DETERMINES HOW MY CONTRIBUTION WILL BE USED?**

You decide by designating your contribution to one or more agencies or to the general designation options described in the CFC Charity List.

### **HOW ARE RECIPIENT AGENCIES CHOSEN TO PARTICIPATE IN THE CFC?**

All agencies participating in the CFC must apply and meet standards set forth by OPM regulations. Any human health or welfare agency recognized by the Internal Revenue Service under 26 U.S.C. 501(c)(3) is eligible to participate if it meets all requirements under OPM regulations. Details are on page 4 of this manual.

### **HOW MUCH DOES IT COST TO RUN THE CFC?**

In 2015, 17.1% of monies pledged (\$31,589) were spent for the costs of operating the campaign. The costs for 2016 are budgeted at \$32,088. Of course, this year's "percentage" figure will depend upon final expenditures and campaign attainment.

### **WHY SHOULD I SUPPORT THE CFC?**

Your contribution will help to prevent misery, disease, dependency and crime. It can mean a helping hand to the small, the aged, and the helpless and to many others in all walks of life. We all have a responsibility to members of our global family.... CFC represents one easy way to make a difference.

### **WHAT HAPPENS TO MY CONTRIBUTION IF I DO NOT DESIGNATE TO A SPECIFIC AGENCY?**

According to the formula developed by the Office of Personnel Management, your undesignated contribution will be shared by all agencies receiving designations, in the same proportion that they received designations. Details on international designation option are shown on page 5 of this manual and will be included in the CFC Charity List.

### **I HAVE HEALTH INSURANCE - I WON'T NEED TO USE THESE SERVICES.**

We hope you will not need the help of any of the health-related charities. But CFC agencies serve more than just ill and handicapped persons. Many services help maintain family unity, and contribute to stronger communities in which to live. Chances are, you and your family are utilizing CFC-supported services right now. CFC-supported programs benefit all of us, directly or indirectly. CFC is for everyone.

### **HOW CAN I AFFORD TO GIVE?**

The needs here in the Red River Valley area, across the country, and overseas cannot be ignored. Those of us who have federal jobs are among the fortunate in our country and world. Through payroll deductions, the modest amount you give from each paycheck goes a long way to help others - it's year-round giving for

year-round services.

### **WHY GIVE BY PAYROLL DEDUCTION?**

Most federal employees find it easier to spread their contribution over a period of one year, rather than making a one-time cash contribution.

### **WHAT ABOUT COERCION?**

Coercion is prohibited by the office of Personnel Management through regulations governing CFC. The only way to establish support for the CFC and to insure growth is to build a constituency of well-informed, positive and voluntary contributors. Coercion gets short-term support at best, and the long-term price is far greater than a few, resentfully-given donations. Each Federal organization has a procedure for complaints about undue pressure or coercion. Civilian employees should contact their personnel offices, and military personnel their commanding officers for information about filing complaints.

### **HOW MUCH SHOULD I GIVE?**

Many federal employees ask for some guidance on an appropriate amount for their CFC pledge. A commonly accepted formula is at least one hour's pay per month for twelve months. This results in a generous annual gift, payable in relatively small payroll deductions. Giving is voluntary but the need is great. Please give as much as you can.

### **BUT WHAT DO I SAY?**

Share something meaningful to you about CFC: an agency or service that you know about; the low campaign costs; the wide choice of agencies within CFC. See a campaign film (if available), use campaign posters and read the CFC Charity List. These resources will give you facts and ideas to share with your co-workers. Tell how effective payroll deduction is for most donors. Ask for the contribution. Many employees will need some time to think about their choices in the CFC Charity List. Be sure to set a time to get back to each employee. Follow up personally and please thank everyone who turns in a pledge form, whether he/she gives or not.

## **CAMPAIGN MATERIALS**

You will be sharing two pieces of campaign information with your co-workers, a pledge form and the CFC Charity List. A searchable charity listing including the Universal Giving list is also available at our local CFC website: [www.cfcredrivervalley.org](http://www.cfcredrivervalley.org) .

The printed local 2016 CFC Charity List contains 2,715 local, national and international agencies.

Donors must use the five-digit code assigned to the agency to designate their contributions! No "write-in" pledges are allowed. All designations must be to agencies listed in the CFC Charity List.

Each listing will include the following important information:

- \*5 Digit Code
- \*Name of the Agency
- \*Telephone Number
- \*Twenty-Five Word Description
- \*Percent of Administration & Fundraising Costs
- \*Taxonomy of Service Code(s)

### **PLEDGE FORM**

The body of the pledge form consists of three copies. The first should be turned in to your payroll office for payroll deductions; the second to your Project Officer/LFCC Loaned Executive and PCFO; and the third copy is to be returned to the donor with our thanks.

#### **In order to contribute, the employee:**

- (1) writes the total annual gift in the space provided and
- (2) indicates whether the gift is to be paid by payroll deduction or by cash or check. Donors who wish to use payroll deduction may use one of the preprinted boxes, or fill in an annual amount in the blank box. The minimum amount for payroll deduction is \$1.00 per pay period.
- (3) Contributors who want to designate their contributions to a particular agency or agencies on the list in the CFC Charity List should write the agency number or general designation option letters and the total dollar amount of the designations in the appropriate boxes on the pledge form. The minimum designation is \$1.00 per agency. There is no upper limit, except that the designations cannot exceed the total annual dollar amount. Donors should be reminded that designations must be written on the pledge form with the full five-digit code from the CFC Charity List.
- (4) Donors should write in their work telephone numbers in the upper right hand corner so that they can be contacted in case of question.

(5) Payroll deduction pledges must be authorized by the donor in the lower right-hand corner. Payroll deductions will begin on January 1, 2017 and will end with the last paycheck in December 2017.

(6) Checks must be written to the Combined Federal Campaign.

(7) If a donor wishes to have his/her name and home address given to the agencies designated on the pledge form, he/she should check the "I DO WANT" box and provide the information requested in the lower left-hand corner on the pledge form. Donor names and addresses will be mailed to appropriate agencies in the spring of 2017. We will pass on only the names of donors who have signed the authorization and provided their home addresses.

(8) Contributors who wish to make confidential donations may place the donation, with the completed pledge form, in a sealed envelope and print CONFIDENTIAL on the front. You should include it unopened, in your Keyworker envelope. Your Project Officer/LFCC Loaned Executive will include it in his/her envelope to CFC. The confidential envelope will remain unopened until it reaches the CFC office. We will credit your federal agency's account with the value of the contribution inside, so that records will be accurate.

As a Keyworker, you should check that all necessary sections of the pledge forms are completed, and that all contributors using payroll deduction have signed their forms. Please turn in any unused pledge forms to your Project Officer/LFCC Loaned Executive at the conclusion of your agency's campaign.

### **KEYWORKER ENVELOPE**

The Keyworker envelope is the method by which you turn in pledge forms and donor information to the Project Officer/LFCC Loaned Executive.

A copy of each pledge form should be collected in the Keyworker envelope and given to your Project Officer/LFCC Loaned Executive.

If the donor contributes cash or a check, it should be paper clipped to the donor's pledge form and put in the Keyworker envelope. Donors should be encouraged to designate the agencies to which their contributions will go.

Keep all reports confidential. All donors deserve confidential treatment of their names and personal decisions.

On the face of the Keyworker envelope, fill in all necessary information clearly. Report on only what is contained in this envelope. Any confidential envelopes in your possession should be included, unopened, in this Keyworker envelope.

Verify the contents WITH your Project Officer/LFCC Loaned Executive before turning in the envelope. Take time to agree with the Project Officer/LFCC Loaned Executive about the amount of cash and checks included in your Keyworker envelope before turning it over.

Keep a copy of the face of your Keyworker envelope--it's easy to simply put the envelope on a copier and copy what you have written there.

Do not hold Keyworker envelopes--turn them in as soon as they are completed. As a Keyworker, you are responsible for the cash, checks, and pledge forms you turn into your Keyworker.

If you have any questions about your Keyworker responsibilities or any aspect of the campaign, please ask your Project Officer/LFCC Loaned Executive -- or feel free to call the CFC Office at (701) 775-8661.

THANK YOU for your hard work and commitment to the CFC.