



## **2009 CFC Keyworker Guide**

You've been selected to be a Combined Federal Campaign Keyworker... CONGRATULATIONS! You are in a unique position. You'll have the responsibility of collecting money that will help support thousands 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 to 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 charity list, Keyworker training activities, and the website. If you still have questions about CFC after the training session and reading your material, contact your 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 to 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/VCR/DVD player.
2. Contact your ECM for a copy of the 2009 DVD if you do not already have one.
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.

If a group meeting is not possible, or some of your co-workers are unable to attend a group meeting, talk to individuals one-on-one about the benefits of the 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. **Tell the contributor about the recognition program**
4. **Ask for a contribution**

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.
- Tell 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.cnnmfc.org](http://www.cnnmfc.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.
- Show the sample "iCan" coin which can only be purchased for \$5.00 by a Federal employee who makes a payroll deduction.

3. Discuss the Donor Recognition Program:

- All Donors: Give Smart Card
- Turquoise Level (\$500-\$1,499) Give Smart Card **AND** 2009 CFC Mug
- Rio Grande Level (\$1,500+) Give Smart Card **AND** 2009 CFC Mug **AND** Painted Pony
- *All orders for donor incentives must be received by December 15, 2009 to be eligible.*

4. 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.

**STEP 4: SAY THANK YOU!!**

Thank everyone for taking time to learn about the CFC and thank those who contribute. Present the contributor with the GiveSmart Card and if they have donated \$500 or more, order their gift through your ECM. (Orders should be turned in on a weekly basis and gifts distributed to the donor as soon as you receive them).

**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.cnnmfc.org](http://www.cnnmfc.org)  
for the complete 2009 charity list.



# CFC Pledge Form Instructions

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

- Contributor's **full name**.
- Social Security Number** is only necessary for those giving through payroll deduction.
- Minimum Payroll Deduction** gift is \$1.00 per pay period
- Check that the **annual amount** is correct:  
**Military:** monthly amount x 12 = annual amount  
**Civilian:** pay period amount x 26 = annual amount
- Contributors using payroll deduction must sign the authorization at the bottom of the card.**
- Contributor's **checks** must be made payable to **Combined Federal Campaign**. Checks payable to a designated charitable organization **cannot** be accepted.
- 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.cnnmfc.org](http://www.cnnmfc.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.*
- Be sure that the **total amount designated does not exceed the total annual contribution** shown in box 4.
- 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.

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

Pledge amount box **MUST** be checked to release amount of donation along with name and address to assigned charity.

- If the donor wishes to receive their recognition item, it must be checked at the bottom left of the pledge form.

**Step 1** – Print name, work address, telephone number, and your Federal Agency.

<b>CENTRAL &amp; NORTHERN NEW MEXICO CFC</b> 1224 Pennsylvania NE, Albuquerque, NM 87110			CFC Campaign No. 0606		ATTENTION PAYROLL OFFICES: Only use this number to identify the local campaign.
PRINT NAME (LAST)	FIRST	MIDDLE INITIAL	<input type="checkbox"/> CIVILIAN <input type="checkbox"/> MILITARY	FEDERAL AGENCY AND OFFICE	SOCIAL SECURITY NUMBER/EMPLOYEE ID
WORK ADDRESS & ZIP CODE					WORK PHONE ( )

**Step 2** – Fill in the appropriate boxes for military or civilian.

MILITARY		CIVILIAN		CHARITY CODE	ANNUAL AMOUNT
<input type="checkbox"/>	x 12 pay periods =	<input type="checkbox"/>	x 26 pay periods =		
<input type="checkbox"/>	\$108.34 x 12 pay periods = \$1,300.08	<input type="checkbox"/>	\$60.00 x 26 pay periods = \$1,560.00		
<input type="checkbox"/>	\$100.00 x 12 pay periods = \$1,200.00	<input type="checkbox"/>	\$50.00 x 26 pay periods = \$1,300.00		
<input type="checkbox"/>	\$86.67 x 12 pay periods = \$1,040.04	<input type="checkbox"/>	\$40.00 x 26 pay periods = \$1,040.00		
<input type="checkbox"/>	\$65.00 x 12 pay periods = \$780.00	<input type="checkbox"/>	\$30.00 x 26 pay periods = \$780.00		
<input type="checkbox"/>	\$43.34 x 12 pay periods = \$520.08	<input type="checkbox"/>	\$20.00 x 26 pay periods = \$520.00		
<input type="checkbox"/>	\$21.67 x 12 pay periods = \$260.04	<input type="checkbox"/>	\$10.00 x 26 pay periods = \$260.00		

CASH/CHECK AMOUNT: \_\_\_\_\_ CHECK # \_\_\_\_\_  
 Make check payable to the Combined Federal Campaign

DESIGNATED GIFT: To designate one or more charities or federated groups, fill in the charity code(s) and dollar amounts above.

**Step 3** – Check the box for how much you would like to give per pay period in either the “military” or “civilian” section. Or, fill in the amount you wish to donate through cash or check contribution.

**Step 4** -- Fill in the 5 digit CFC charity code number (as listed in the Charity List or on the website at [www.cnnmfc.org](http://www.cnnmfc.org)) and the annual amount of the designation to each (for more than 5 charities, attach additional pledge form).

**RECOGNITION OPTIONS**  
\*Only checked options will be processed.\*  
 \*Address information is required to receive an acknowledgment from the charity.\*  
 My check/mark(s) and completed information below authorize the CFC to release my name and the corresponding information to my designated charities.

Pledge Amount: \_\_\_\_\_  
 Home Address: \_\_\_\_\_  
 Home E-mail: \_\_\_\_\_

**DONOR RECOGNITION: I would like to:**  
 Receive the recognition item(s) I qualify for based on my pledge/contribution OR  
 I decline recognition item(s).

**Step 5** – If the donor would like their name, HOME address, E-mail, and/or the amount of their pledge released to the charities they designated, fill out this section. If they do not fill out this section, their information will not be released. This information will only be released to the charities chosen.

**Step 6** – Check the appropriate box if the donor would, or would not like, to receive their recognition items.

**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 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 \_\_\_\_\_

See reverse side for information on volunteer opportunities in your community. OPM FORM 1654 REV. MARCH 2009

**Step 7** – Make sure the pledge form is signed and dated and that the donor's social security number is provided if using payroll deduction.

**Step 8** – Contributors keep copy #3 for their records. Keep copies #1 and #2 together, report the totals on the Report Envelope and turn them into your ECM.



# 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 DEDUCTION

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. Bring it to your ECM for joint verification.
16. **ECM will complete turn-in process.**

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.

**Central & Northern New Mexico 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 \_\_\_\_\_