



Keyworker Guide



Combined Federal Campaign of the National Capital Area Handbook

Thank you for serving your community as a Keyworker!



[GiveCFC.org](https://www.GiveCFC.org)

How the CFCNCA Works

for Keyworkers






1 Prepare for your role.

Learn about the CFCNCA and your responsibilities as a campaign worker through training sessions and resources. Choose your cause, make your pledge, and engage with the campaign before inviting others.

2 Inspire your colleagues.

Be a CFCNCA champion by planning fun events, involving charities, using inspirational stories, including leadership, and personally inviting your colleagues to join the CFC community. Make giving easy by assisting with online donations, mobile giving, and paper pledge submissions.

How to use the new CFC Giving Mobile App

-  **Download the App.** The CFC Giving Mobile App is available for Apple and Android devices by searching “CFC Giving” in the app store.
-  **Sign in or create an account.** Returning donors: Use the same login as your CFC online pledge portal account. New donors: Create an account, verify it, and set up your profile. (*Note for new users:* To ensure your office/unit receives credit for your pledge, click DONATE on GiveCFC.org, log in to the account you created, and update your profile to select your Department/Agency/Office.)
-  **Search for charities.** If you are attending a campaign event, you can see the list of charities participating in your event. Or you can generate your own list of CFC charities and their descriptions by entering search criteria: charity name, CFC code, EIN, or keyword.
-  **Give.** Tap each charity you would like to support and enter the dollar amount of the donation you would like to give.
-  **Complete your donation.** Update or add a funding source (bank account or credit/debit card).

Need Help? If you need assistance navigating the app, please call TASC Customer Care at 1-800-797-0098. Hours of operation are 8 a.m. – 5 p.m. (CST).

3 Help is on the way.

Your efforts will bring help and hope to millions of people as monetary and volunteer pledges go to support the missions of thousands of participating charities.



Keyworker Checklist

Throughout its nearly 60-year history, the federal community has donated more than \$8.4 billion through the Combined Federal Campaign (CFC), supporting important causes like medical research, poverty, education, military support, and many others. As a Keyworker you will inspire your colleagues to *Show Some Love* for their own causes through the 2020 CFCNCA. Following this checklist will ensure you have a successful campaign season.

Attend a training session. Learn about the CFCNCA, ways to give, how to answer questions about the campaign, and how to confidently invite your co-workers to donate funds and volunteer their time. Even if you were a Keyworker in the past, attend a training session to learn about enhancements to the CFCNCA online giving system and pledge processing procedures, and find out new tips on how to reach remote employees and run virtual campaign events.

Get your supplies. Work with your Campaign Manager/Coordinator to obtain campaign materials early to start promoting the campaign as close to the start of the campaign as possible. Remember, there are digital resources available on the website, GiveCFC.org.

Know your CFC unit code. Know your office/unit 6-digit CFC unit code and ZIP code. Reach out to your Campaign Manager or CFCNCA representative to make sure you have this code for your unit (or units, if necessary). This code is how your unit/office will get credit for donations made by your co-workers. If your unit is not in the pledge system, contact the CFCNCA office.

My CFC unit code is: _____ My office ZIP code is: _____

Publicize the campaign. Use the emails, posters, brochures, leadership messages, social media, and campaign event ideas on the website to promote the CFCNCA. Make sure to include your specific CFC unit code on messaging and materials.

Practice giving. Get familiar with the online donation portal, paper pledge forms, and CFC Giving Mobile App so you can offer help as needed. Practice making your pledge before inviting your co-workers to give!

Invite each of your co-workers to give. The most effective way to engage and encourage a potential donor is through one-on-one conversations virtually or in person. Make a connection, invite each of your co-workers to give, and do it confidently.

Follow up. Research shows it may take four to six touchpoints before action is taken. Use the provided resources (donor cards, email templates, etc.) to make following up easy. If there is a campaign event coming up, invite your co-workers to join you to have fun with colleagues and see what the CFCNCA is all about!

Submit completed paper pledge forms. Encourage donors to promptly submit pledge forms to you or a designated drop-off location, if available. Review the completed form for legibility, details, and calculation of the charity allocations. Store all paperwork securely until delivery to your Campaign Manager/Coordinator. Verify each form has the correct CFCNCA unit code and ZIP code to ensure your unit will be credited with this donation.

Express gratitude. Always thank everyone for their time and for considering a donation through the CFCNCA. Provide donor recognition items, if available in your zone, to those who self-identify.



Inviting Your Co-Workers to Give

One of the primary reasons someone gives to charity is because they were asked by someone they trust. As the CFCNCA representative for your office/unit, it is vital that you personally talk with each of your co-workers to let them know about the CFCNCA and offer them the opportunity to contribute through a monetary pledge or volunteer hours. Here are five steps to follow to inspire your co-workers to give.

1 Step 1: Tell your story. Put together your responses from the worksheet to tell a powerful story about which charitable cause is important to you and why.

Example 1: "My cause is education. Growing up in public housing, I had limited educational resources, the public library was not near, and tutoring services were not readily accessible, peers in my neighborhood could not relate to my educational aspirations. Today, my quest is to provide and support educational opportunities and resources to those with limited resources."

Example 2: "My cause is animal welfare. Returning home from a long deployment, my furry friends' joy and love once we reunited was undoubtedly the one feeling I will not forget. With the CFC, I can make both a monetary and a volunteer pledge to an organization that has given so much to me."

2 Step 2: Ask about their favorite cause. Ask your co-workers if they have a favorite charitable cause and have them explain why. Listen to their answer! They may end up convincing themselves to give.

3 Step 3: Explain the benefits of the CFC. Choose a few of the benefits of the CFCNCA and highlight those.

Example: "I know there are a lot of options out there for giving back, so you might be wondering why you should give through the CFCNCA. One of the main reasons I give through the CFCNCA is that I can give through payroll deduction. That lets me give a little each month, and it adds up to a nice gift by the end of the year. I can also give to several charities at once, and I know they are legitimate organizations. I can also pledge volunteer hours through the CFCNCA. And, I love being a part of this tradition. When we all give together, it means more money for the charities. Did you know that last year the CFC raised \$83.8 million?!"

Inviting Your Co-Workers to Give *(continued)*

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Step 4: Invite them to pledge. Invite your co-workers to join you in making a pledge through the CFCNCA.

Example: "I made my pledge yesterday using the online pledge portal. It was really easy. I gave via payroll deduction, but you can also give using a credit card, debit card, or bank account. Will you consider making a pledge of your own this year?" You can provide them the How to Pledge card with their specific CFC unit code written on it.

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Step 5: Invite them to engage. Invite your co-workers to participate in some of the CFCNCA engagement activities.

Example: "Did you also know there are some other cool ways to get involved this year? If you go to the website at GiveCFC.org, you can watch charity videos, read charity success stories, track the progress of the campaign, submit your selfie for the homepage, or send a thank you message to a charity."

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Step 6: Thank your co-workers for their time.

Example: "Thank you for giving me the time to talk to you about this. If you have any questions about the CFCNCA, let me know. And, don't forget to check out the website: GiveCFC.org."



How to Virtually Invite Co-Workers to Give

Now, more than ever, many federal employees are working remotely, so it is important to have ideas on how to reach them and invite your co-workers to give. Here are a few suggestions to get you started:

Hold a special **online kickoff** (e.g., webinar) with charity guest speakers and information about the campaign. Demo the Virtual Charity Fair from the website.



Provide each employee with a copy of the **How to Give card**.



Send a note or **CFCNCA Invitation** (or one of the other campaign resources) through the mail (or email) to your co-workers for an in-hand reminder about the campaign.



Request that **leadership** record a brief video or phone message.



Ask for a **CFCNCA intranet page** within your agency with progress, events, and information.



Send periodic **email reminders** with compelling charity success stories pulled from the Virtual Charity Fair. Consider tying these in with the Cause of the Week.





Tracking Your Contacts

List the names of each of the co-workers you are responsible for contacting about the CFCNCA below. Then note when you talked with them about the CFCNCA. Make sure to follow up with your contacts about their donation. And finally, close the loop by marking when you provided recognition (the Thank You Card or recognition item if provided in your zone). You will need to report your contacts to your Campaign Manager to report to OPM.

Assigned contact names	Initial Invitation	Follow Up	Needs Recognition	Recognition Received
1				
2				
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How to Give

There are three ways to give this year: online, paper pledge, or CFC Giving Mobile App.

Online

- 1) Click **DONATE** on cfcnca.GiveCFC.org
- 2) Create an account or log in to your existing account.
- 3) Complete or update your profile:
 - a. Enter the **ZIP code** of your office to access the correct list of units/offices.
Our office ZIP code is: _____
 - b. Enter your **CFCNCA unit code** to automatically populate the Department/Agency/Office selections.
Our CFC unit code is: _____
- 4) Search for charities you want to support.
- 5) Make your pledge by selecting your designated charities and allocating funds or volunteer hours.

For a detailed walkthrough with screen shots, see the How to Give Online presentation on the website.

Paper Pledge Form

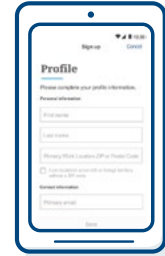
Prefer using a good old pen and paper?

You can still complete a paper pledge form. Just get one from your Keyworker or download it from your local zone's website. Fill it out using the instructions on the second page and then turn it in to your Keyworker.

CFC Giving Mobile App

Download the App

The CFC Giving Mobile App is available for Apple and Android devices by searching "CFC Giving" in the app store.



Sign in or create an account

Returning donors: Use the same login as your CFC online pledge portal account.

New donors: Create an account, verify it, and set up your profile. (*Note:* To ensure your office/unit receives credit for your pledge, click DONATE on GiveCFC.org, log in to the account you created, and update your profile to select your Department/Agency/Office.)

Search for charities

If you are attending a campaign event, you can see the list of charities participating in your event. Or you can generate your own list of CFC charities and their descriptions by entering search criteria: charity name, CFC Code, EIN, or keyword.

Give

Tap each charity you would like to support and enter the dollar amount of the donation you would like to give.

Complete your donation

Update or add a funding source (bank account or credit/debit card).



Paper Pledges

Reviewing Paper Pledges

Having donors submit their paper pledge form to a campaign worker allows the campaign worker to check for common pledge form errors. All required fields (marked with an asterisk *) must be completed. Forms should be reviewed for legibility, details, and calculation of the charity allocations. If you discover any errors, work with the donor to correct them before submitting to your Campaign Manager/Coordinator. Pledge forms missing required information will experience processing delays and/or potentially will not be able to be processed. Ensuring the six-digit CFC unit code and office/unit ZIP code are correct helps to credit the correct agency/unit for donations. Please advise donors NOT to wait until the end of the campaign to turn in their pledge form. While the CFC will accept pledges postmarked by the end of the campaign solicitation period, submitting forms early allows adequate time for processing and reporting.

If your agency is teleworking, you might not be able to collect pledge forms in person. Donors may mail completed paper pledge forms directly to the CFC Processing Center: P.O. Box 7820 Madison, WI 53707-7820.

Common Errors to Double Check

- A.** CFC unit code and the ZIP code for your unit/office are correct
- B.** Reporting unit information is filled in and correct
- C.** Social Security number is provided for a payroll deduction pledge
- D.** Total gift and charity designation amounts should match
- E.** Authorization portion is signed
- F.** Funds must be designated using a 5-digit charity code
- G.** This section is optional. By leaving it blank, donors are giving anonymously to the charities they chose. By completing it, they are agreeing to release some of their personal information to their chosen charities.

**2020 Combined Federal Campaign
FEDERAL EMPLOYEE PLEDGE FORM**

OPM Form 1654-A

Please use black ink. Sections marked with * are mandatory.
Full instructions on reverse. Submit this original Pledge Form to your Keyworker as early as possible to allow time for processing. Keep a copy for your records. OPM accepts online pledges through Jan. 15, 2021, at gpm.gov/ShowSomeLoveCFC. CFC organizations do not provide goods or services in whole or partial consideration for any contributions made to the organizations via this pledge.

Donor Information (required)

1. Primary Email Address (official government) *		2. Donor Type *	
		<input type="checkbox"/> Civilian <input type="checkbox"/> Active Duty Military	
3. Name * (first name)		(last name) *	
4. CFC Unit Code (six digits)		5. ZIP Code of Your Office/Unit *	
[][][][][][]		<input type="checkbox"/> I am located in a foreign country/territory.	
6. Overseas Employees			
7. Your Department/Branch of Service * (no acronyms)			
8. Your Agency/Command * (no acronyms)			
9. Your Office/Unit * (no acronyms)			

Pledge Information (required)

10. Allotment Source *		11. Amount Per Deduction	12. Total Annual Gift *	13. Charity Designation *	
<input type="checkbox"/> Payroll		\$ _____	\$ _____	CFC Charity Code	
SSN (only required if electing payroll)		Check your payroll frequency:	(Amount per deduction multiplied by the payroll frequency)	Equal	
[][] - [][] - [][][][]		<input type="checkbox"/> Monthly (x12)	\$ _____	Volunteer Hours	
<input type="checkbox"/> Check		N/A	\$ _____	\$ _____	
Make checks payable to "Combined Federal Campaign" and attach to this form.			Check Amount	\$ _____	
<p style="font-weight: bold; font-size: small;">Authorization *</p> <p style="font-size: x-small;">If I chose payroll deduction as my payment source, I hereby authorize any agency of the United States Government by which I may be employed during 2021 to deduct the amount(s) shown above from my pay each pay period. My deductions will be in effect for one full year starting with the first pay period after January 15 and ending with the last pay period that includes January 15 of the following year. I authorize my payroll service provider to pay the amounts shown to the Combined Federal Campaign. I understand that I may revoke this authorization in writing at any time before it expires. I also acknowledge that I have the right to receive a notification if the amount(s) scheduled to be transferred differs from the amount(s) displayed above. If I chose check, I hereby authorize Give Back Foundation on behalf of the Combined Federal Campaign to process my paper check as an electronic funds transfer (EFT) for the payment amount elected.</p> <p>Signature: _____ Date: _____</p>					
<p style="font-weight: bold; font-size: small;">Total Annual Contribution</p> <p>\$ _____</p>					

Information Release (optional)

14. By completing the information below, I authorize the CFC to release my name and the following to my designated charity(ies):			
Personal Email Address		Pledge Amount Release	
		<input type="checkbox"/> Yes <input type="checkbox"/> No	
Home Address		City	
		State ZIP Code	

Individuals may pledge online at gpm.gov/ShowSomeLoveCFC and may contact the CFC Help Desk Monday through Friday from 8 a.m. until 6 p.m. Central Time at 800-797-0098 (toll-free) or 608-237-4898 (local/international) with questions about the pledge process.

Common Concerns / FAQs

You may be faced with objections as you solicit CFCNCA support. It is important to know how to talk with your co-workers about their concerns and answer their questions. Here are some common concerns and suggested responses:

Why should I give through the CFCNCA and not directly to my charity?

Through the CFCNCA, you can give through payroll deduction, which allows you to spread your gift over the course of the year. You can also pledge to more than one charity through a single pledge. There are thousands of vetted and approved charities to choose from that can receive these unrestricted funds. You can pledge online or through the CFC Giving Mobile App which makes it easy to track your gift and renew it each year. You can even pledge volunteer hours, in addition to your monetary gift. Perhaps the biggest reason of all to give through the CFCNCA is that you can be a part of the BIG impact we have for all the participating charities that are depending on our support.

I am busy. I do not have time to talk about the CFCNCA.

I understand. (Ask if another time would work better and arrange to come back. If not, continue with this short response.) Can you give me just 15 seconds? The CFCNCA is a chance for federal employees to give to causes they care about and Show Some Love to those most in need. Giving is easy, with options for payroll deduction, credit card, or e-check. Many charities take part in the CFCNCA, and I am sure some of your favorite causes are represented. I hope you will consider participating this year. Let me at least leave this card with you that outlines some reasons to give through the CFCNCA. I will stop by later to see if you have any questions.

I can't afford to give much.

Oh, I know what that feels like. That's why I like payroll giving so much. Just a small contribution, \$5 or the price of one cup of coffee, per pay period, can really add up for a charity or cause you care about. Share the 2020 Impact Statements, which can be found at cfcnca.GiveCFC.org, to show the impact of a donation. Our donations can do so much, like providing food for some of the thousands of residents in our area who are at risk of hunger. And did you know that you can also pledge volunteer hours through the CFC? (Graciously accept "no" for an answer if the person declines again. Thank them for their time.)

I want to be sure my agency/unit gets credit for my donation.

Great! All you have to do is remember two things: use our unit/office's unique six-digit CFC unit code and the ZIP code for our unit/office when you make your pledge. (Provide these numbers to your co-workers to avoid any confusion.)

Common Concerns / FAQs *(continued)*

How do charities become a part of the CFC?

Charities must apply and be approved to be part of the CFC each year. Each charity must be a 501(c) (3) nonprofit organization, submit an IRS Form 990, describe its human health and welfare benefits, and meet other requirements. Charities complete online applications, and only vetted and approved charities make it to the final list.

Does the CFC actually benefit charities?

Charities rely on the CFC as a critical source of revenue and an inexpensive way to attract new donors. Charities require diverse streams of income, including foundations, corporations, direct mail, special events, and the CFC. CFC donations are especially treasured because they are unrestricted funds, allowing nonprofit organizations to respond effectively to community needs. Equally important, CFC donations provide charities with a consistent source of funding throughout the year.

How can I be sure the charity I chose will actually receive my donation?

I can understand that concern. It's one of the main reasons I support charities through the CFCNCA, because I know those charities have been vetted and that my selected charities will get my pledge. The online giving portal allows you to log in at any time of the year and monitor your payments to the charity you selected.

Should I choose the charity with the lowest overhead?

Not necessarily! Overhead is essential, and charities should be good stewards of their funding, but it is not the only factor to consider when choosing a charity. Overhead includes costs like salaries, rent and facilities costs, technology requirements, advertising and mailing, events, etc. These costs vary depending on mission scope, location, and technology/salary requirements.

How can donors give anonymously through the CFC?

By choosing not to complete the optional "Information Release" section on the paper pledge form or the online giving system, donors are essentially making an anonymous gift to their chosen charities.

Tips for Being an Effective Keyworker

Invite co-workers with face-to-face contact (even virtually!)

Direct communication is the most important way to inspire your co-workers. Don't forget about remote employees!

Use stories

Share charity success stories and your personal passion to motivate co-workers to give to the causes they care most about.



Invite everyone

Ensure that all your co-workers know they have an opportunity to give through the CFCNCA.



Keep the campaign visible

Use social media, emails, posters, brochures, and virtual events to promote the campaign.



Understand all giving options

Ensure you are familiar with the online donation method, paper pledge forms, and CFC Giving mobile app to offer help as needed.

Encourage payroll deduction

Payroll contributions yield higher levels of giving and have a greater impact on the charities people choose to support.

Stay connected to the campaign

Connect and engage with your local campaign on social media by liking and sharing posts and participating in the campaign promotional days.

Maintain campaign integrity

Keep pledges secure and give them to your Campaign Manager as quickly as possible.



Give thanks

Thank every co-worker for considering a donation through the CFCNCA and provide donor recognition items to those who self-identify.

