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2016 Keyworker Handbook

Gateway Combined Federal Campaign

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Show Some Love As A Keyworker

Welcome to the 2016 Combined Federal Campaign. Thank you for serving as a Keyworker for your department or agency. You will be joining thousands of Federal employees to help implement the campaign. We hope you can help inspire your colleagues to **Show Some Love** to the charities that mean the most to them. Last year federal employees in the Gateway CFC raised \$2,381,907. The work that you do as a Keyworker is critical for us to reach that level again!

Your primary responsibilities as a Keyworker are to ask your co-workers to make a contribution through the CFC and to process those pledges. Follow these steps to create a successful campaign:

- Attend a training session to learn how to confidently ask your co-workers to donate to the CFC, and how to process pledges.
- Work with your Loaned Executive (LE) or Campaign Coordinator (CC) to get supplies and ensure you have enough pledge forms, ink pens, report envelopes and myPay reminder notepads (the last item is only for those who have the myPay option).
- Talk to your co-workers – ideally in person – about the campaign. Ask them to **Show Some Love** to their favorite charitable causes, and give to them through the CFC.
- Follow up with each person about contributing through the CFC, and sincerely thank them for considering a donation.
- Process paper pledge forms: check them for completeness and accurate math, prepare the Keyworker Tally Sheet and Envelope, and promptly deliver them to your Campaign Coordinator.
- *Store all paperwork, checks and cash in a secure location if you are not able to turn the envelope in immediately.*

2016 Key Dates:

Find details and additional events on the calendar at www.GatewayCFC.org

October 3 campaign starts

We hope you can schedule a charity fair or rally at your office in this time period!

November 30 Conclusion of solicitation period

December 15 (sooner is better!) Deadline for payroll deduction pledges to be turned in to payroll offices!

December 15 myPay and EEX on-line pledge tools close.

January 2016 Deadline for submitting volunteer award nominations

May 2016 Awards presented at Excellence in Government program.

See Page 6 of the Catalog of Caring for instructions on how to fill out a paper pledge form.

100% Ask Tool

This can help you systematically “ask” and follow up with all of your co-workers, whom you’ve been assigned to invite to participate in the CFC. Make notes to remind yourself who and when to follow up with them, remind them about the CFC, and pick up their pledges. This is private information, so do not make it public.

This form is available on-line at www.GatewayCFC.org in the “Tools & Resources” section. We encourage you to send a copy of your 100% Ask sheet to the CFC office in your **Yellow** Keyworker Report envelope.

Gateway Combined Federal Campaign 2016 -- Keyworker's 100% Ask Tool

Keyworker: _____

Agency Name: _____

Account #: _____

We recommend that each Keyworker use this form to list all of their co-workers that they are assigned to reach with the CFC. Then date when each step (column) is done, and make notes as desired. This form is available at www.GatewayCFC.org in "Tools & Resources." Thank you!

	First Name	Last Name	Met with this individual and invited them to participate in the campaign. Provided Pledge Form. Delivered a Catalog of Caring or informed them of location of a shared copy in workplace.	This individual is a teleworker. E-mailed them about the campaign.	Donor reported that they used an online donation tool that doesn't require paperwork.	Picked up completed paper pledge form or individual chose not to participate.
1						
2						
4						
5						

How to Ask Your Co-Workers to "Show Some Love"

CFC Keyworkers are responsible for inspiring colleagues and ensuring every Federal employee is offered the opportunity to participate in the campaign. Follow these tips to fulfill your role and encourage giving.

1 Talk to your co-workers in person and share the reasons to participate in the CFC.

- Giving is easy and secure — choose from the list of charities and causes, then donate online or with a paper pledge form.
- Payroll deduction makes it easy to make small weekly contributions that quickly add up to a significant impact.
- Charities love the CFC and rely on donations from the campaign because it is a reliable, low-cost source of revenue.
- With 20,000 participating charities, it is easy to find a cause that each individual donor cares to support. Donors can designate their contribution to "local" charities across the country, as well as national and international charities.

2 Share why the CFC is important to you.

Talk about the causes that you support and give examples of the positive impact a donation can have for someone in need. Share a personal story, if you are comfortable telling it, of how an organization has helped you or your family. Every one of us has been touched by an organization -- if not numerous organizations -- on the CFC list. Encourage each person to **Show Some Love** to their favorite charities through the CFC.

3 Explain how to contribute.

Let your colleagues know that they can give online (see page 3 for on-line giving options), or they can fill out a paper pledge form (payroll deduction, cash or check options). Leave a pledge card and ink pen with each person so that they have a visual reminder about the CFC and information on how to donate. If they can use the myPay system, give them a myPay step-by-step instructional "post-it" note. Always, thank everyone for their time.

4 Follow up with your co-workers.

Ask if they have any questions, need a pledge form, or require help giving online. You can do this in person (which is best) or by phone or e-mail. If they can use the myPay system, give them another myPay "post-it" note.

5 Thank each person for considering making a contribution.

Whether or not they give, it is important to leave everyone with a good feeling about CFC. If they don't give this year, perhaps they can next year.





How to Give Online



#1: myPay Pledge

Most federal employees who have the myPay system for managing their payroll and benefits information can now use myPay for setting up their CFC pledge. This includes employees at these agencies:

- Department of Defense
- Department of Energy
- Health and Human Services
- Veterans Administration
- And some other agencies offer myPay

We encourage donors who use myPay to look up the 5-digit codes for charities they wish to give to

before they start entering their pledge into myPay. Donors have about 20 minutes before the myPay system times out, and they cannot save it and come back to it to complete later. The "Search Charities" button at www.GatewayCFC.org, or the *Catalog of Caring* make advance prep easy.

Active duty Air Force, Army or Navy personnel will need to enter and confirm the Campaign code for the Gateway region when starting a myPay pledge. The region code is: **0528**. This region code is filled in automatically for civilians, Marines and other employees.

Benefits of On-Line Giving

Searchable: It is easy to search for charities you wish to support

Accurate Math: Type in your donation per pay period, and it tallies your total donation for the year. Key in charity designation amounts; it does the math!

Readable: You type it in yourself, then review and confirm your intentions. A data entry person doesn't have to interpret your handwriting!

Available: On-line tools are open 24/7 through December 15. (But please don't wait until the last minute!)

Confidential & Secure: EEX and myPay are secure links directly to your payroll provider. No SSN information is exposed. Nexus does not retain your SSN.

Efficient: Reduces administrative time, which maximizes dollars to your designated charities

Printable: Donors may print a copy of their pledge for their records.

#2: CFC-EEX E-Pledge

Employee Express offers employees in some agencies the choice of making a CFC payroll deduction pledge on-line through Employee Express (EEX). Federal agencies participating in EEX CFC E-Pledge System in the Gateway CFC region in 2016 include:



- Department of Interior
- Department of Transportation
- Environmental Protection Agency
- Equal Employment Opportunity Commission
- General Services Administration
- National Archives & Records Administration
- National Labor Relations Board
- Office of Personnel Management
- Railroad Retirement Board
- Social Security Administration

#3: CFC Nexus: Can be used by Anyone; is the Only Option for Credit Card Gifts

If your office cannot use myPay or EEX, or if a donor would prefer to make a credit card contribution, this is the option. CFC Nexus is a way for a donor to enter, then print their own pledge card, for payroll deduction, credit card, cash or check contributions. Think of CFC Nexus as a convenient way to print a perfectly legible, mathematically-correct pledge form. Go to www.GatewayCFC.org menu item: pledge on-line. Payroll pledges entered into CFC Nexus will not be implemented unless a printed, signed copy is sent to the payroll office.

On-Line tools are not required to make a payroll deduction pledge; you may still use paper forms.



How to Process Pledges

Processing On-Line Donations

No additional paperwork is needed for **myPay** or **Employee Express** contributions, they connect directly to the payroll offices. Total pledges made using these on-line tools will be downloaded regularly, and be reported at www.GatewayCFC.org Click on the "Current Campaign Totals" button, set the Displayed Report Year to 2016, and sort to find your agency by group or CFC account number. If you have any questions about these steps, or how recently myPay or EEX were downloaded to this report, e-mail jerry@gatewayCFC.org or call (314) 621-6182 ext. 3.

CFC Nexus does NOT connect to payroll offices, so paper must be printed to send to them.

1. For CFC Nexus payroll deduction pledges, the donor must print and sign two forms in ink, one to go to payroll office, another for the CFC office. (DoD and VA employees making payroll pledges should be encouraged to use the myPay system, and NOT the Nexus tool.) Treat one copy as **white** and the other as **yellow**, per paper instructions below, and tally in a separate Keyworker Reporting Envelope than paper pledges. Be sure to send these **"white"** copies of their pledge to the appropriate payroll office.
2. For cash or check contributions set up through CFC Nexus, donors need to print only one form to come to the CFC office with their donation. Treat this as a **yellow** form, and send to CFC in same envelope as other Nexus pledges.
3. CFC Nexus is the only tool available for making Credit Card donations, and no additional paperwork is required for credit card contributions.

Processing Paper Pledges & Paper Copies of CFC Nexus Pledges

1. Collect the pledge forms.
2. Review each pledge form for "Common Errors" listed on page 2.
3. Follow the instructions on the back of the Keyworker Envelope. Separate the **white**, **yellow** and **pink** copies of the pledge forms. The pledge form coversheet can go into a recycling bin. **White** copies of payroll pledges go into the lower envelope, for **white forms**. **Yellow copies** of payroll pledges, plus cash, checks (and the **white copy** of pledge forms for cash and checks) go into the **yellow** Keyworker Envelope.
4. Give the Donor the **pink** copy of their paper form for their records.
5. The Keyworker Envelope Tally Sheet can be filled out by hand, or there is an Excel spreadsheet available on the web site in "Tools & Resources." The electronic Excel file can "do the math" for you. Photocopy or print a copy of the Keyworker Envelope Tally Sheet for your records, to help figure out questions if the CFC office needs to contact you. Enclose your Tally Sheet with your **yellow** Keyworker Envelope and the **yellow** copies of pledges.
6. Separate **yellow** and **white** envelope parts.
7. Review the Keyworker Envelope Tally Sheet with your LE or CC. Together, the two of you will sign it to affirm that all the pledges listed are in the **yellow** envelope. Put the Tally, pledges with cash and checks into the **yellow** Keyworker Envelope, then seal it.
8. **Make sure someone sends the white copies of pledge forms to the appropriate payroll office(s).** This is usually the Campaign Coordinator's task.

Anonymous or Confidential Donations

These are rare. The donor should seal his /her pledge form in a standard #10 envelope and label it "Anonymous CFC Pledge." The Keyworker should not open the sealed envelope, but turn it in using a separate Keyworker envelope. They will not be able to tally these. Anonymous donations will be added to the agency total after CFC auditors process the pledges. CFC auditors will work with the team to send anonymous donor's payroll pledges to payroll, if needed.



Frequently Asked Questions and Their Answers

Why is the CFC important?

Over the past 55 years, Federal employees have contributed more than \$8 billion to charities across America. The CFC is the largest workplace giving campaign in the world. Last year, Federal employees generously pledged more than \$2,381,907 to charities through the Gateway CFC.

How do charities become part of CFC?

Charities must apply to be part of the CFC. Each charity must be a 501(c)(3) nonprofit organization as identified by the federal Internal Revenue Service (IRS), submit a recent IRS Form 990 (which is a financial report), describe its human health and welfare benefits and meet other requirements. Application information can be found at www.gatewaycfc.org or www.opm.gov/cfc.

Why do charities love CFC?

Charities require diverse streams of income, including foundations, direct mail, special events and CFC. The cost to raise funds through CFC is very low compared to other fundraising tools. Your donations are especially treasured because they are unrestricted funds,

How Much Does it Cost a Charity to Raise \$1?

CFC:	8¢
Grants:	20¢
Direct Mail	25¢
Special Events:	50¢

allowing nonprofit organizations to effectively respond to community needs. Equally important, CFC donations provide charities with a source of funding received through-out the year.

How do I choose a charity to support?

The charity search function at www.gatewaycfc.org can help you find the right charity for you. Or check out the index in the paper Catalog of Caring. Search on-line for causes that interest you by using service categories or keywords, and sort them by zip code if you wish. Then make your donation online or by filling out a paper pledge form, and use the charities' five-digit CFC number to designate your donation to causes you care about.

Is there a minimum donation?

There is a \$2 minimum per pay period for payroll deduction.

What happens to undesignated donations?

All undesignated donations are combined and shared proportionately among all charities and federations that received designations.

What do we make checks out to?

Gateway CFC or simply CFC.

Will my contribution really make a difference? Absolutely! Look at these examples:

\$5	Buys polio vaccinations for 5 kids.		parents about results.		canoeing programs for veterans
\$10	Buy five blankets for refugees.	\$52	Deliver nutritious meals to a home-bound senior citizen for a month.	\$120	Provide a family displaced by a fire a place to stay for two nights.
\$10	Provides 50 minutes of life-skills training for an adult with developmental disabilities.	\$52	Provide a day of support for a crew of student volunteers to improve public parks.	\$260	Bring a 4-part series on bullying or conflict management to a class of 5 th graders.
\$26	Help a food pantry distribute \$520 worth of food.	\$52	Give shoes to 5 needy kids.	\$260	Help reunify a runaway teen with his/her parents with counseling.
\$26	Pay to transport a disabled client to an urgent medical appointment.	\$78	Buy a bus pass so a homeless parent can get to/from work for a month.	\$500	Assist one person for one year with the repair of a wheelchair, leg braces or communication device.
\$50	Provide food and care for an injured wild animal.	\$100	Help four women in a developing country start a small business and generate income for their families.	\$520	Supply a hearing aid to a needy senior.
\$50	Spays/neuters an animal to slow pet overpopulation.	\$100	Provide 24-hour crisis line support to victims of domestic violence for 3 days.	\$1,040	Set up a homeless family in a transitional apartment, along with utilities and budget classes.
\$52	Buy and/or protect one acre of tropical rainforest to protect natural areas vital to global climate and species diversity.	\$100	Give care to a home-bound individual with disabilities for 3 hours, to relieve their full-time family caregiver.	\$1,040	Screen 100 high-risk people for serious health conditions.
\$52	Provide in-home screenings to assess two toddlers for developmental delays, then educate	\$100	Help provide hunting, camping or	\$1,980	Enable an injured veteran to participate in special water and/or land therapy for a year.

Check Paper Pledge Forms for these common errors:

- ☑ Is the pledge form legible? Make sure you can read it, so the data entry team can read it accurately!
- ☑ Total Annual Gift or Total Annual Amount are incorrect—use the payroll calculation table inside the top cover of the pledge forms, or a calculator to double check the math.
- ☑ The Total Annual Amount designated to charity(ies) in the lower section cannot be higher than the Total Annual Gift. If designated Annual Amount is lower than the Total Annual Gift, the remainder will be treated as undesignated.
- ☑ Payroll Pledges MUST be signed.
- ☑ Is the Social Security number or Employee ID on payroll deductions? Payroll deduction cannot be authorized without them. U.S. Postal Service employees must provide their Employee ID number; their payroll office will reject a pledge with a Social Security Number.
- ☑ Invalid charity code(s). Check that each charity designation code has five numbers.

Regulations

- CFC is the only authorized charitable fund raising drive in the federal workplace on behalf of charitable organizations.
- Solicitation shall be conducted during duty hours.
- Solicitation methods must permit TRUE VOLUNTARY GIVING.
- Donors may stop their payroll deduction contribution any time by notifying their payroll office.
- Donors may choose what information is released to the charity(ies) they designate to, by filling out (or leaving blank) pertinent spots on the pledge form for their name, address or e-mail address.
- Charitable agencies and federations will be sent only released contributors' names to acknowledge. The organizations may not use this list of names for future solicitation.

Some Key Points in CFC Regulations:

- Coercion is strictly forbidden. Asking people to consider participating is not coercion.
- Setting a goal of “100% participation” is considered coercion and is prohibited.
- Supervisors may not solicit those who fall under them in the chain of command.

Complete Regulations & Accountability

The Office of Personnel Management oversees the CFC, based on Federal regulations, 5 CFR §950. For details, visit www.OPM.gov/cfc

Prohibitions

- Special CFC fundraising events may be allowed as long as they are used to build enthusiasm for CFC and are approved by that office's respective agency head and/or ethics officer. These activities may not be used in lieu of true voluntary giving. Incentives to promote participation in rallies or to promote giving are acceptable.
- Soliciting employees by any individual above them in their chain of command is STRICTLY prohibited. **Bosses should not directly ask their subordinates to contribute; although their overall encouragement of participation and talking about CFC in staff meetings is acceptable.**
- Supervisory inquiries about whether an individual employee chose to participate, or the amount of their donation, are not allowed.
- Using campaign results in performance appraisals is prohibited.
- **Setting a 100% participation goal is unrealistic and prohibited.** Developing and/or publicizing lists of non-contributors violates the privacy act.
- Write-ins for organizations not listed in this year's CFC web site are not allowed. Codes for agencies that are not accepted in the 2016 CFC will be treated as undesignated funds. Attempts will be made to explain this to the donor at the time it is discovered.



Keep the campaign visible

Use social media, e-mails, posters, brochures and events to promote the campaign. Publicize special events in advance - tell the CFC office if other agencies' employees can join in.



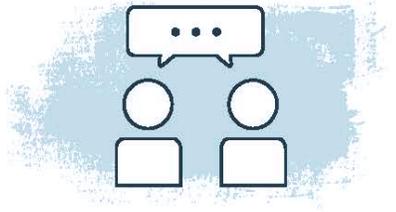
Reach out to everyone

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



Make giving personal

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



Talk about the CFC in person

Speaking face-to-face is the most effective way to inspire your co-workers to give.



Understand all giving options

Ensure you are familiar with online donations and paper pledge forms so that you can offer help as needed.



Encourage payroll deduction

Payroll deduction produces higher levels of giving and has a greater impact on the charities people choose to support.



Stay connected to the campaign

Connect with the Gateway CFC on Facebook by liking and sharing posts. Encourage your co-workers to post selfies of them with their "I Care About" signs (print out from www.GatewayCFC.org in the "Tools" section).



Maintain campaign integrity

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



Give thanks

Thank every co-worker for considering a donation through the CFC.