

2016



Campaign Team Training



Overview:

- ★ CFC Overview
- ★ Campaign Results
- ★ OPM Update
- ★ Rocky Mountain CFC Overview
- ★ Campaign Team Overview
 - ★ Team Member Role & Responsibilities
- ★ Campaign Timeline
- ★ Solicitation Tips, Tools & Activities
- ★ Giving Methods
- ★ Pledge Collection & Reporting
- ★ PII & OSI Security
- ★ Tips & Tools
- ★ Q&A

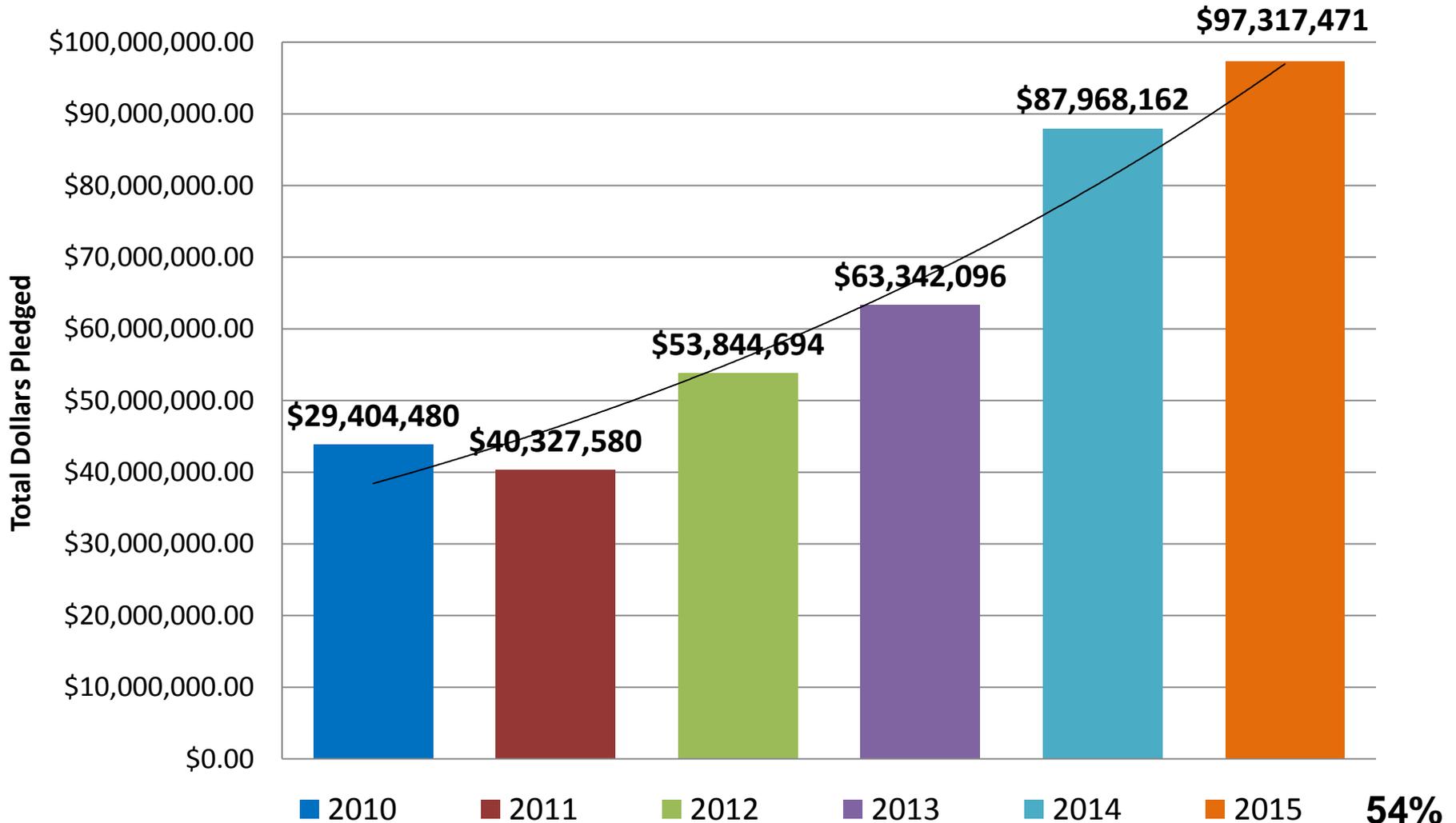
RM CFC Pledge Type Results:

★ 2015 Results

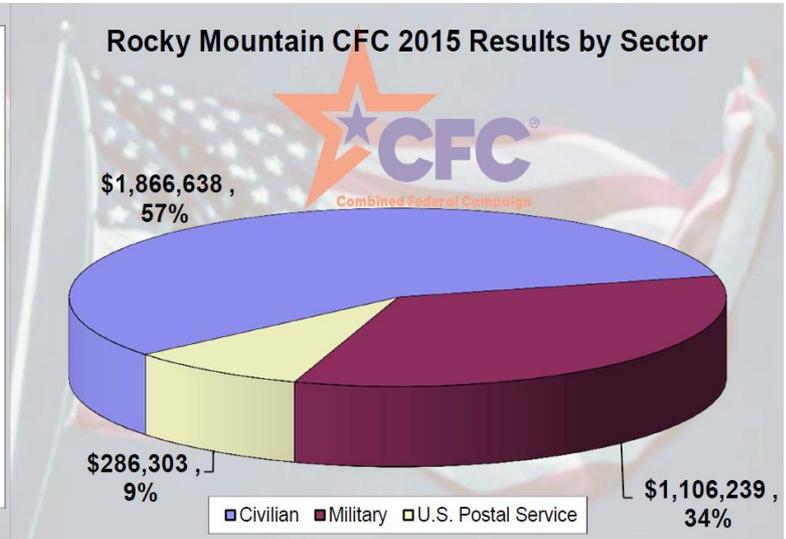
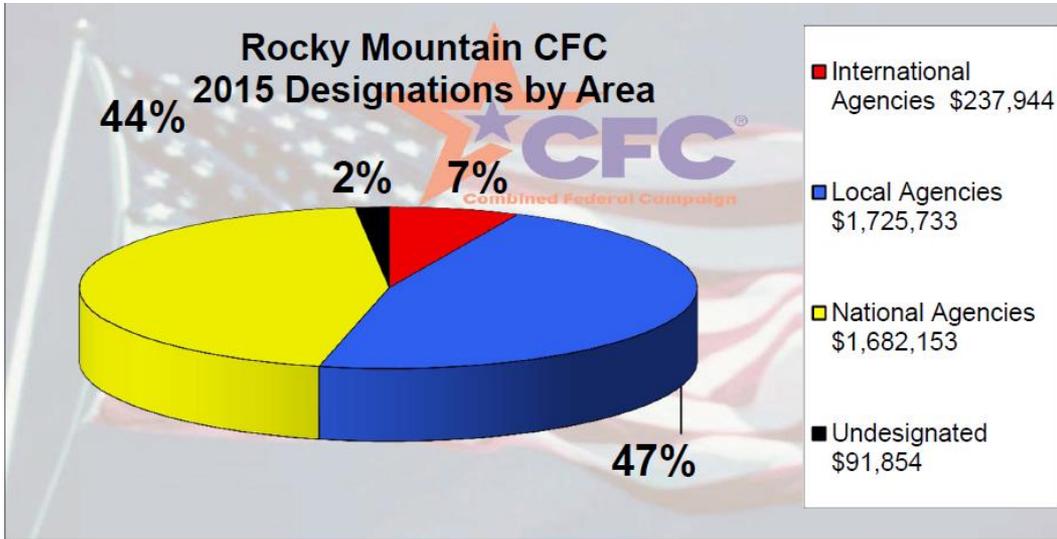
★ National - \$177,781,964

★ Regional - \$3,259,181

National e-Giving Trends (dollars)



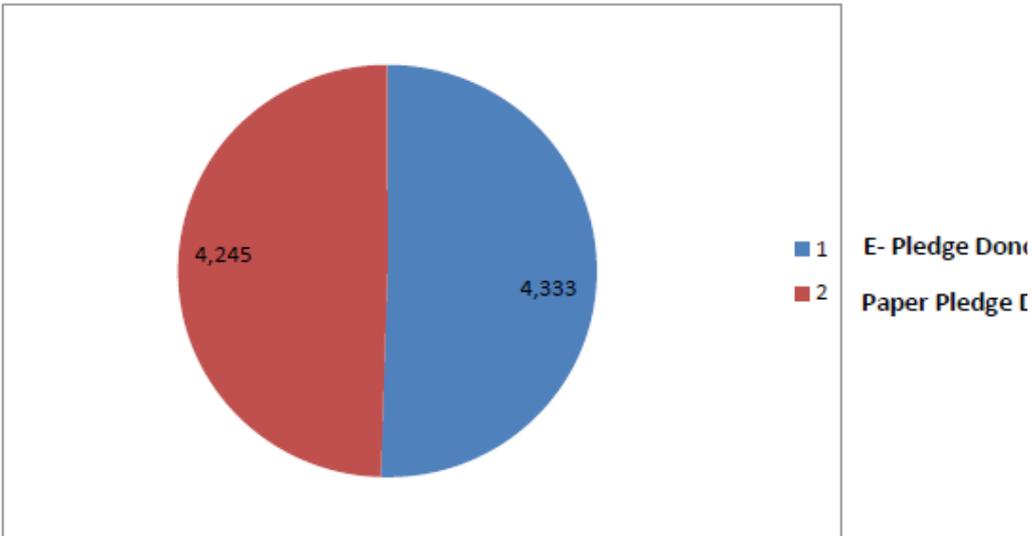
RM CFC 2016 Results:



\$3,259,180

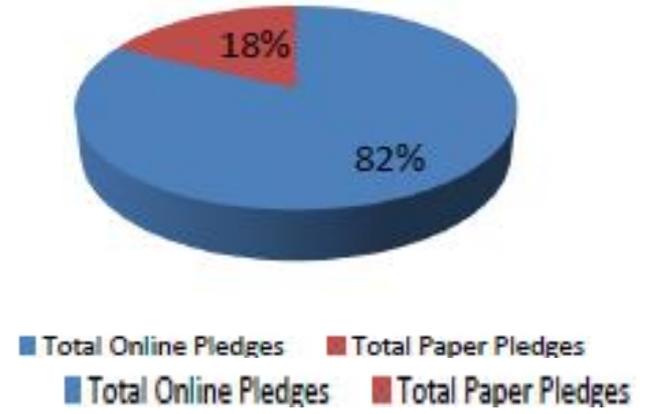
RM CFC Pledge Type Results:

2014



2015

Rocky Mountain CFC
On-Line vs Paper Pledges
Rocky Mountain CFC
On-Line vs Paper Pledges



CFC Trends & Challenges

- ★ **Decreasing Volunteer Base** - Downsizing government personnel/more contracting
- ★ **PII Security Issue** – Traditional paper pledges
- ★ **Processing Inefficiency** – Traditional paper pledges
- ★ **Inefficiency** – Local campaign geographic boundaries
- ★ **Ineffective** – Lack of immediate donor feedback
- ★ **Average gift** continues to **increase** while **participation** continues to **decrease** **Baby Boomers Retiring** – transitioning dem.

OPM Strategic Focus

Online Giving

- ★ Address PII Concern
- ★ Donor Confidentiality
- ★ Efficiency - Reduced Administrative Workload
- ★ Accuracy
- ★ Meet Millennials Needs



Donor Charitable Interests

- ★ Donors are increasingly more engaged around causes than specific charities, especially Millennials
- ★ Donors care about the impact of their gift
- ★ Donors want choices in giving
- ★ Online giving is crucial for the future of the CFC

2016 Campaign Transition

★ **New Regulations Effective 2017**

- ★ Immediate Disaster Relief
- ★ New employees can give w/in 30 days of being hired
- ★ Immediate Charity Acknowledgement of Contribution

★ **Bring the CFC into the 21st Century**

- ★ Online Campaign - 100% online giving within four years

★ **Lengthened Solicitation Period**

- ★ Regulated Campaign solicitation period 1 Sept - 15 Jan.
Regions can pick a time period within these start and finish dates.

Virtual Campaigning

★ www.rockymountaincfc.org

★ [Home](#)

★ [Pledge Online](#)

★ [Search Charities](#)

★ [Check Progress](#)

★ [Contact Campaign](#)

★ [About CFC](#)

★ [Donors](#)

★ [Charities](#)

★ [Campaign Team](#)

★ [Training](#)

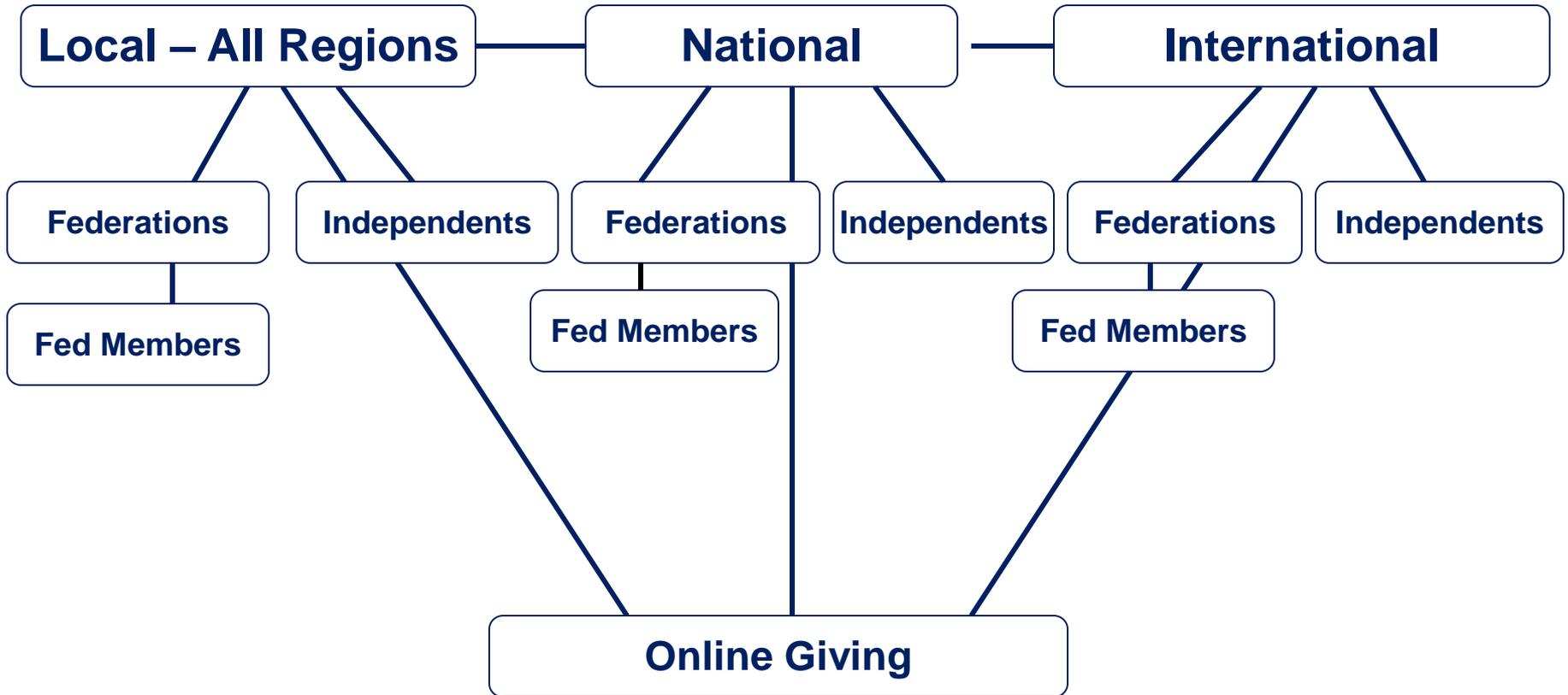
★ [Materials](#)

★ [Forms](#)



A screenshot of the Rocky Mountain CFC website. The top banner features a group of diverse young people smiling and pointing towards the camera, with the text "Choose YOUR Cause - help and guide the youth" above them. Below the banner is a navigation bar with buttons for "PLEDGE ONLINE", "SEARCH CHARITIES", "CHECK PROGRESS", and "CONTACT CAMPAIGN". A secondary navigation bar includes links for "Home", "About CFC", "Donor Info", "Charities", "Coordinators & Key Workers", "Campaign Happenings", and "Contact Us". The main content area is titled "Rocky Mountain Combined Federal Campaign" and is divided into two columns. The left column, titled "What is the CFC?", contains the CFC logo, a paragraph of text describing the campaign, and three video thumbnails: "2016 CFC Video", "More Than Just A Bill Video", and "President Ob...". The right column, titled "What's Happening...", features a large graphic with the text "Care For Causes" and "Rocky Mountain Combined Federal Campaign". Below the graphic is the text "The 2016 Rocky Mountain CFC is gearing up and will officially kick off in October!" and "Help make the world a better place by giving to causes YOU care about!". At the bottom right, there is a link for "Federal ECCs/Military IPOs" and a note about training for ECCs and IPOs.

All Around Giving



2016 CFC Regulations

- ★ [5 CFR 950](#)
- ★ [OPM Directives](#)
- ★ B-325023, Occupational Safety and Health Review Commission--Refreshments for a Combined Federal Campaign Event, July 11, 2014
<http://www.gao.gov/products/B-325023>
- ★ [CFC Guidance \(Memoranda\)](#)
- ★ [DoD Directives 503501](#)
- ★ [DoD Directive 503505](#)
- ★ [Air Force Regulations \(AF36-3101\)](#)
- ★ [Army Regulations \(AR600-29\)](#)
- ★ Guidance from Specific Agencies
 - ★ Ethics Officer
 - ★ General Council

CFC Regulations Rules Overview

- ★ 100% Awareness
- ★ 100% Opportunity
- ★ 100% Follow-Up
- ★ No Coercion
- ★ PII & OSI Compliance
- ★ 5CFR Part 950
- ★ OPM Directives
- ★ OPM Memorandum
- ★ GAO Directive
- ★ Agency Ethics Rules

Campaign Team Overview

- ★ Employee Campaign
Coordinator (ECC) or Military
Installation Project Officer
(IPO)
- ★ Department or Mission Element
Project Officers
DPOC/MEPOC
- ★ Keyworkers (1:25)
- ★ Event & Activities Volunteers
- ★ Finance Officer/Payroll
Coordinator
- ★ Communications Officer

Campaign Team Roles

Employee Campaign Coordinator (ECC) or Military Installation Project Officer (IPO)

- ★ Team Leader!
- ★ Recruit the Department/Directorate/Division Chairs
- ★ Create the Campaign Plan for Facility/Installation
- ★ Implement Campaign Activities
 - ★ Kick Off Event
 - ★ Rally
 - ★ Fundraisers
- ★ Oversee Keyworkers (solicitors)
- ★ Recruit Volunteer Assistants
 - ★ Finance Officer
 - ★ Public Relations/communications Coordinator
 - ★ Events Coordinator
- ★ Motivate & Inspire Team
- ★ Contribution Collections, Reconciliation & Reporting
- ★ Campaign Reporting
 - ★ Overall Campaign Activities
 - ★ Pledge & Giving Activities

Campaign Team Roles

Keyworker

- ★ Solicits Personnel
 - ★ Inspires & Motivates Giving
 - ★ Group Presentation
 - ★ Charity Speakers
 - ★ Employee Testimonials
 - ★ One-on-One Solicitation
 - ★ One-on-One Follow up
 - ★ Collect Traditional Pledge Form
 - ★ Prepare Reporting Envelope
 - ★ Verify Contents with Finance Officer/ECC/IPO
 - ★ Distribute Thank You Gifts
 - ★ Donor Follow Up

Campaign Team Roles

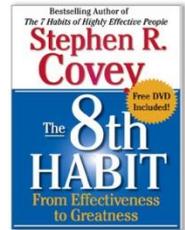
Support Volunteers

Finance Officer

- ★ Collect Contribution Envelopes from Keyworkers
- ★ Verifies Content
- ★ Provides Thank You Recognition Gifts
- ★ Records Envelope Contents on Ledger
- ★ Reconciles myPay Donor Report
- ★ Processes NEXUS Payroll Contributions
- ★ Verifies EEX Contributions
- ★ Maintain PII Compliance

Rocky Mountain CFC Strategic Plan

★ The 8th Habit:



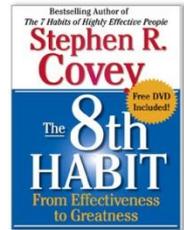
“Find your voice”...

Rocky Mountain Strategic Plan

★ The 8th Habit Applied:

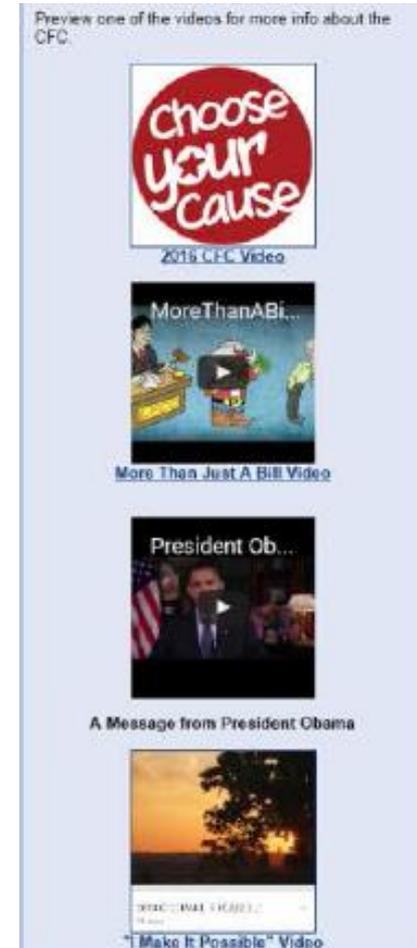


“...and inspire others to find theirs.”



Videos:

- ★ Training – “More Than Just a Bill”
 - ★ Answers FAQs
- ★ Promoting
 - ★ Choose Your Cause
 - ★ “Thank you Feds”
 - ★ National Videos
 - ★ President Obama Message
 - ★ “I Make It Possible”



Campaign Team Best Practices

- ★ Secure Top-Down Support
- ★ Set a Timeline and Goal
- ★ Create Awareness
- ★ Coordinate a Solicitation Process
- ★ Incorporate Fun
- ★ Say “Thank You”

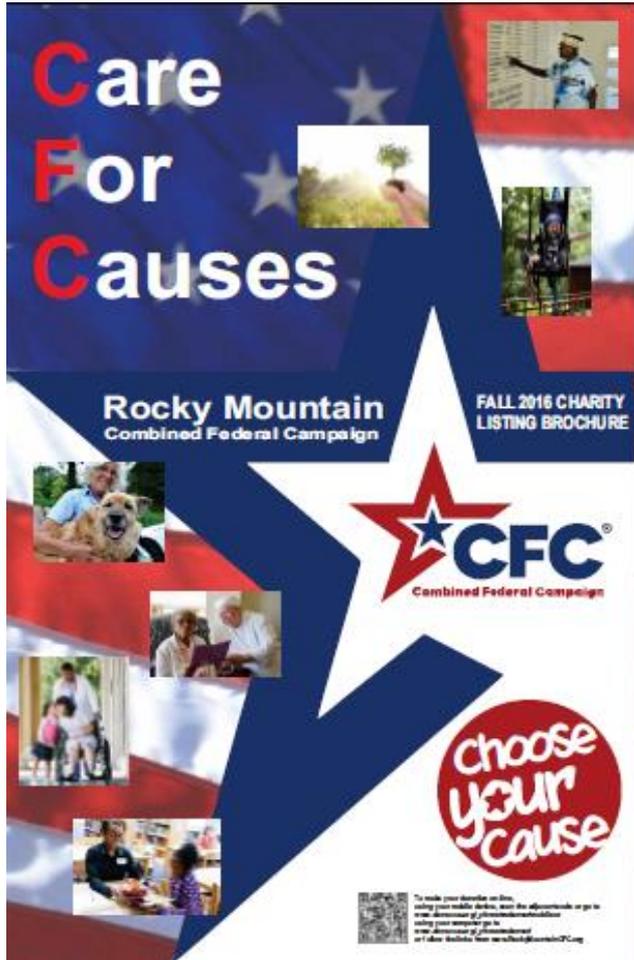
Promotions

- ★ [FACEBOOK](#) – Like our page, post events and opportunities to get involved with your charity; link to CFC website: www.rockymountain.org

The screenshot shows the Facebook interface for the 'Rocky Mountain Combined Federal Campaign' page. The page name is 'Rocky Mountain Combined Federal Campaign' with the handle '@rmcfc2015'. The cover photo features a mountain range and the text 'Combined Federal Campaign Rocky Mountain Region'. The page is categorized as a 'Charity Organization' in 'Colorado Springs, Colorado'. The page shows 0 likes, 0 website clicks, and 30 post engagements for the week. A notification indicates a 0% response rate for a post by Natasha Wish Colorado.

Promotional Materials

Brochure & Poster



Post It Promo

CFC
Combined Federal Campaign

PLEDGE ONLINE!

1. Go to www.rockymountaincfc.org
2. Click Pledge Online button
3. Select the appropriate online giving platform
4. Follow the steps to make your pledge

Online Giving Support
CFCOnlinegivingsupport@comcast.net

THANK YOU FOR MAKING YOUR ONLINE PLEDGE!
Combined Federal Campaign

Online Flyer

CFC
Combined Federal Campaign

Get Your Give ON-Line

Thermometer



Note Card Reminder

CFC
Combined Federal Campaign

GET YOUR GIVE *Online*
www.rockymountaincfc.org

Care For Causes by Giving On-Line Today!

CFCNexus
Credit Card, Cash, Check or Payroll Deduction
Employee Express or myPay
Payroll Deduction Assignments

Choose Your Cause





CHOOSE YOUR CAUSE...

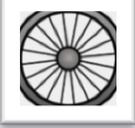
Arts, Culture & Humanities **Social Action**
Environment **Community Improvement**
Crime **Science & Technology** *shelter*
National Security **NUTRITION** **Civil rights**
Medical Research **Human Services**
Health Care **Animal Welfare**
Youth Development **PUBLIC SAFETY**
Advocacy **Sports** **Disaster Relief**
Religion **CRISIS INTERVENTION**

Employment

**E
d
u
c
a
t
i
o
n**



Care For Causes...

A - ARTS, CULTURE, HUMANITIES 	F - MENTAL HEALTH 	K - FOOD & NUTRITION 	P - HUMAN SERVICES 
B - EDUCATION 	G - VOLUNTEARY HEALTH 	L - HOUSING & SHELTER 	Q - CIVIL RIGHTS, SOCIAL ACTION & ADVOCACY 
C - ENVIRONMENTAL 	H - MEDICAL RESEARCH 	M - PUBLIC SAFETY & RELIEF 	S - COMMUNITY IMPROVEMENT 
D - ANIMAL RELATED 	I - CRIME & LEGAL 	N - RECREATION & SPORTS 	T - PHILANTHROPY 
E - HEALTH CARE 	J - EMPLOYMENT 	O - YOUTH DEVELOPMENT 	W - PUBLIC BENEFIT 

Choose YOUR cause today @ rockymountaincfc.org



Care For Causes...

Choose YOUR Charities	Charity Code	Choose Your Way	Choose Your Gift
		Payroll Deduction CFC Nexus, myPay, Employee Express	Civilian – 26 pay periods Military – 12 pay periods
		Credit Card CFCNexus	One Time Gift
		Check CFC Nexus PDF Fill-In Pledge Form Traditional Pledge Form	One Time Gift
		Cash CFC Nexus PDF Fill-In Pledge Form Traditional Pledge Form	One Time Gift

Choose YOUR cause today @ rockymountaincfc.org

Solicitation Activities

★ Pre Campaign – Early September

Event Planning & Preparation

Pick up CFC Materials

★ Pre Campaign – Late September

Signage – Hang posters, set up material & giving station

Promotions – Email reminders

★ Campaign Kick & Charity Fairs – October

See website for all the dates and location near you

Promotional Flyers

★ Agency Kick Off/Activities – Oct/Nov

★ Mid Campaign Blitz – Nov 14 – 18

Get Your Give Online

Hand out business cards, use post-it notes

★ Final Blitz – Dec 1 - 15

Giving Tuesday, Season of Giving, Tax Deduction,
Last Call

Solicitation Activities

Promote Campaign

★ Charity Fairs



Solicitation Activities

SOUTHERN FRONT RANGE

- **HQ AFSPC & N-NC Colorado Springs, CO -**
Monday, October 3
 - * Air Force Space Command - AM
 - * Norad/Norcom - PM
- **Schriever Air Force Base Colorado Springs, CO –**
Tuesday, October 4
- **21st Space Wing, Colorado Springs, CO –**
Wednesday, October 5
- **Ft. Carson Army Base Colorado Springs, CO –**
Thursday, October 6

Solicitation Activities

NORTHERN FRONT RANGE

- **Boulder Kick Off, Boulder, CO**
Wednesday, September 28 @ 11:30am – 1:00pm
- **Downtown Denver Kick Off, Denver, CO –**
Tuesday, October 11 @ 11:30am – 1:00pm (Alt. 10/18)
- **Buckley Air Force Base, Aurora, CO –**
Wednesday, October 12 @ 11:30pm – 1:00pm
- **Denver Federal Center, Lakewood, CO –**
Thursday, October 13 @ 11:30am – 1:00pm (Alt. 10/20)
- **Weld/Larimer County Kick Off, Ft. Collins, CO –**
Wednesday, October 19 @ 11:30am – 1:30pm
- **Laramie County Kick Off, Cheyenne, WY –**
Tuesday, October 25 @ 11:30am – 1:30pm

Solicitation Activities

★ Best Practices

- ✓ Chili Cook-Off/ Crock Pot Cook-Off with different categories
- ✓ Candy Grams
- ✓ Fall Festival with pumpkin carving contest, cubicle decorating contests, costume contest
- ✓ Scavenger Hunt
- ✓ 5K walk or run
- ✓ Cutest Pet Contest
- ✓ Bake Sales/Burrito Sales
- ✓ Penny Drive
- ✓ Motorcycle Ride
- ✓ Pie in the Face/Pie on the Tie
- ✓ Jeans or Sports Gear on Fridays
- ✓ Ice Cream Social/Sundae Bar
- ✓ Employee Testimonial E-Blasts
- ✓ Pokémon Go Scavenger Hunt

REGULATION TRANSITION

Fundraisers not allowed in 2017; no cash or personal paper checks.

Solicitation Activities:

Agency Events

- ★ Need Details on event
 - ★ Date, Time
 - ★ How many people are expected to attend
 - ★ How many charities are accommodated
 - ★ Address
 - ★ Event schedule
 - ★ Parking
 - ★ Security procedures
 - ★ Table space for each charity
 - ★ Email details by Sept 16 to Cari Allen @ cariallen@comcast.net

Registration and Random Selection of charities to keep it a level and even playing field for all who would like to participate

Notification and Confirmations

Solicitation Tools

Tools

- ★ CFC Website: www.rockymountaincfc.org
 - ★ Searchable Charity Database
 - ★ Links to online giving sources (NEXUS, EEX, myPay)
 - ★ PDF Brochure Fill in Pledge Form
 - ★ Campaign Team Handbook
 - ★ Speakers' List for Charity Speakers at group presentation
 - ★ Template E-Blasts
 - ★ All Training materials
 - ★ Links to OPM
 - ★ Links to CFC National Foundation Website

Solicitation Tips

Tips

- ★ **The Number One Reason People don't Give...they weren't asked**
 - ★ Ask sincerely
- ★ **Discuss reasons for giving**
 - ★ Personal, Family, Friend Service/Benefit Impact
 - ★ Pay Forward – Future Impact
 - ★ Encourage Payroll Deduction
 - ★ Remain available as a resource
 - ★ Say “thank you” often

Solicitation Tips

★ CFC Focus Group Results

- ★ Newer employees need education about what CFC is
- ★ Employees felt inundated with too long of a solicitation

Your Tips & Tools - Discussion

SUPPORT CONTACTS:

NORTHERN FRONT RANGE SUPPORT:

Northern Civilian Accounts: Cari Allen, cariallen@comcast.net

Northern USPS Accounts: Jennifer Weems, jen.weems@yahoo.com

Northern Military Accounts: Barbara Barfield, barbarabarfield@comcast.net

SOUTHERN FRONT RANGE SUPPORT:

Southern Civilian Accounts: Barbara Barfield, barbarabarfield@comcast.net

Southern USPS Accounts: Anna Childress, annachildresscfc@comcast.net

Southern Military Accounts: Barbara Barfield, barbarabarfield@comcast.net
and Anna Childress, annachildresscfc@comcast.net

ADMINISTRATIVE & FINANCIAL SUPPORT:

Entire Region: Irma Jones, irmajones53@comcast.net

2016 Giving Methods

★ Transition to 100% Online Giving:

★ Online: Employee Express or MyPay



★ Online: CFC Nexus 

★ Mobile Pledging 

★ Credit Card Giving 



enortqthame tuoy ritlw ebocoad silit nrao2
silt ebu neo uty: Jeeboo POC beam of wioz 2l enortqthame tuoy 2



★ CFC PDF Fill-In or Paper Pledge Form

A complex form with multiple sections, including fields for name, address, and donation information. It includes a header with the CFC logo and various checkboxes and text boxes.

Online Giving

CFC Website: www.rockymountaincfc.org

Online Pledging for the 2016 CFC will be available soon! Check back in September!!

3 Ways to Pledge Online		
<p>CFC Nexus</p>  <p>Cash Check Credit Card Payroll Allotment</p>	<p>Employee Express</p>  <p>Payroll Allotment</p>	<p>myPay</p>  <p>Payroll Allotment</p> <p>Region Code</p> <p>0141</p> <p>Federal Civilian Agency Codes</p> <p>DoD Agency Codes</p> <p>Military Installation Unit Codes</p>
<p>All Federal agencies have access to CFC Nexus.</p> <p>pledge here</p>	<p>Dept. of Education, Interior, State, Transportation, Treasury, EEOC, EPA, FAA, FDIC, FTC, GSA, GAO, NASA, Rail Road Retirement Board, SEC, SSA</p> <p>pledge here</p>	<p>DFAS payroll office agencies - on duty military, VA, HHS</p> <p>pledge here</p>

Online Giving Overview

Reoccurring Gift ONLY:

★ Payroll Deduction – 90% of campaign



★ Employee Express – Participating Federal agencies

- ★ See complete list on website



★ myPay

- ★ My Pay is a new method of online giving for all federal employees paid via DFAS, including DoD Military and Civilian, Veterans Administration, Executive Office of the President, Department of Energy, Health and Human Services, and Broadcasting Board of Governors. EPA, Dept of Energy, HHS, VA
- ★ All Donors - Provide CFC Regional Code: 0141
- ★ Military - Provide Unit Code
- ★ See complete list on website

Online giving Overview

Online Assisted Giving:



- ★ NEXUS Online: Available to anyone
 - ★ Pledging
 - ★ One Time Contribution - Cash, Check
 - ★ One Time Credit Card – 3% third party convenience banking fee
 - ★ Continual Gift – Payroll deduction (must renew annually, print & submit form)
 - ★ Register
 - ★ Search for charities
 - ★ Complete Pledging
 - ★ Confirmation

Traditional Giving



FALL 2016 - Rocky Mountain Combined Federal Campaign
 1716 North Main Street, Suite A149
 Longmont, CO 80501

DATE OF CONTRIBUTION: _____

CFC Campaign #: 0141
 ATTENTION PAYROLL OFFICES:
Only use this number to identify the local campaign.

NFC City/State Code: 08-0600

PLEASE USE A BALL POINT PEN & WRITE FIRMLY
 For a list of CFC charities, visit our website at www.rockymountaincfc.org

PRINT NAME LAST	FIRST	MIDDLE	INITIAL	<input type="checkbox"/> CIVILIAN	FEDERAL AGENCY AND OFFICE	
				<input type="checkbox"/> MILITARY		
WORK ADDRESS & ZIP CODE					WORK PHONE	

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?	\$	X 12 Months =	\$
CIVILIAN PAYROLL	\$	X 26 Pay Periods =	\$
OTHER \$	CASH CHECK (payable to CFC), Check Number: _____		

Charity Code	ANNUAL AMOUNT
	\$
	\$
	\$
	\$
	\$

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 GIFTS: To designate to one or more charities or federated groups, fill in the charity code(s) and dollar amounts above. Undesignated gifts are distributed among all organizations in proportion to their pledges. A complete list of CFC agencies can be downloaded from the CFC website: www.RockyMountainCFC.org

INFORMATION RELEASE (OPTIONAL)
 Any information you enter below will be released, along with your name, to the charity(ies) to which you made a pledge. Do not enter your work address or e-mail.

Home Address: _____

Personal E-Mail Address: _____

In addition to my contact information, I authorize the CFC to release the amount of my pledge to the charity(ies) designated above.

Please check below if applicable or check here if you choose to decline your gift

Philanthropist Level (\$120 to \$1,199) Leadership Circle (\$1,200+)

Annual CFC Collector's Coin 2016 US Mint Proof Coin Set

PAYROLL DEDUCTION AUTHORIZATION
 I hereby authorize any agency of the United States Government by which I may be employed during 2017 to deduct the amount(s) shown above from my pay each pay period during the calendar year 2017 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 _____

PLEASE INITIAL IF YOU MAKE ANY CHANGES

OPM Form 1654 Revised May 2016

Copy 2 - For Central Receipt Point

COPY 2



Traditional Giving

THE PLEDGE FORM

Ensure every person receives a pledge form! It is a 3 part form used to record donor information, contribution method, amount, designation data and payroll deduction authorization. A donor may give by cash, personal check or payroll deduction.

Ensure the pledge form is mathematically correct and no changes have been made to the form that have not been initiated by the donor. Should a change or correction be required, it must be done by the donor and OPM recommends the donor fill out a new form. The erroneous pledge form must be destroyed when replaced by the corrected form. If a donor wishes to give to more than 5 charities two forms must be used; additional charities cannot be written onto the first form.

Please check each pledge card for completeness and accuracy. The Following guide can be used to instruct donors in completing the form; and be used by the Keyworker as a checklist.

Step 1 - Date, then Print name, work address, telephone number, and your Federal Agency.

Step 2 - Fill in the appropriate boxes for either military or civilian, the monthly/ periodical deduction, and the total. Fill out the "Other" section if making a cash or check contribution.

Step 3 - If applicable, check the appropriate awards level donation boxes.

Step 4 - Fill in the 5 DIGIT CFC agency code number (as listed in the Agency Brochure or on the website www.RockyMountainCFC.org) and the annual amount of the designation to each (up to 5 are accepted).

FULL 2014 - Rocky Mountain Combined Federal Campaign
Formal: National Combined Fed CFC
 8600 Denver, Suite 500, Colorado Springs, CO 80914

DATE OF CONTRIBUTION:
 MONTH DAY YEAR

CFC Campaign #: 0141
ATTENTION: PAYROLL OFFICES:
 Only use this number to identify the local campaign.

NFC City/State
 Code #: **03-0000**

PRINT NAME LAST FIRST MIDDLE INITIAL CIVILIAN MILITARY FEDERAL AGENCY AND OFFICE (S/N) EMPLOYEE ID

WORK ADDRESS & ZIP CODE WORK PHONE

CONTRIBUTION: Fill in the boxes showing the amount of your payroll deduction, cash or check contribution. Write in the total of your annual contribution in the space provided.

ALLOTMENT SOURCE	AMOUNT	INTERNAL	TOTAL
MILITARY PAYROLL <small>Branch of Service</small>	\$ X 12 Months =	\$	\$
CIVILIAN PAYROLL	\$ X 26 Pay Periods =	\$	\$
OTHER \$ CASH CHECK (payable to CFC, Check Number)			\$

Charity Code ANNUAL AMOUNT

Charity Code	ANNUAL AMOUNT
	\$
	\$
	\$
	\$
	\$
	\$

CFC Organizations do not provide goods or services in whole or partial consideration for any contributions made to the organization via this pledge card.
DESIGNATED OFFER: To designate to one or more charities or federal groups, fill in the charity code(s) and dollar amounts above. Unavailable gifts are distributed among all organizations in proportion to their pledges.
 A complete list of CFC agencies can be downloaded from the CFC website: www.rockymountaincfc.org

Please Check if Applicable (note: if preferred, you can choose them from a lower category or if you choose to decline your gift check here)

Eagle Club (\$1,600-\$1,400) Presidential Circle (\$1,500-\$2,499) Mile High Power (\$2,500+)

2014 US Min Quarter Set 2014 US Min Presidential Dollar Set 2014 US Min Proof Coin Set

INFORMATION RELEASE (OPTIONAL)
 Any information you are asked for is released along with your name to the individuals to which you make a pledge.
 Home Address: _____
 Personal E-Mail Address: _____
 I authorize my contact information to be released to the amount of my pledge.
 I do not authorize my contact information.

PAYROLL DEDUCTION AUTHORIZATION

I hereby authorize any agency of the United States Government by which I may be employed during 2014 to deduct the amount shown above from my pay each pay period during the calendar year 2014 starting with the first pay period that begins on or after and ending with the last pay period that begins in December, and to pay the amount so deducted to the Combined Federal Campaign or to whom it may be directed by me in writing at any time before I resign.

SIGNATURE: _____ DATE: _____

*****PLEASE INITIAL IF YOU MAKE ANY CHANGES*****

Copy #1 - Payroll Office
Copy #2 - Central Receipt & Accounting
Copy #3 - Contributor Copy

Step 5 - If you would like your name, HOME address, E-mail address and/or the amount of your pledge released to the agencies you designated funds to, fill out this section. If you do not fill out this section your information will not be released. This information will only be released to the agencies you have chosen - NO OTHERS.

Step 6 - Make sure the pledge form is signed and dated and that your social security number is provided if using payroll deduction.

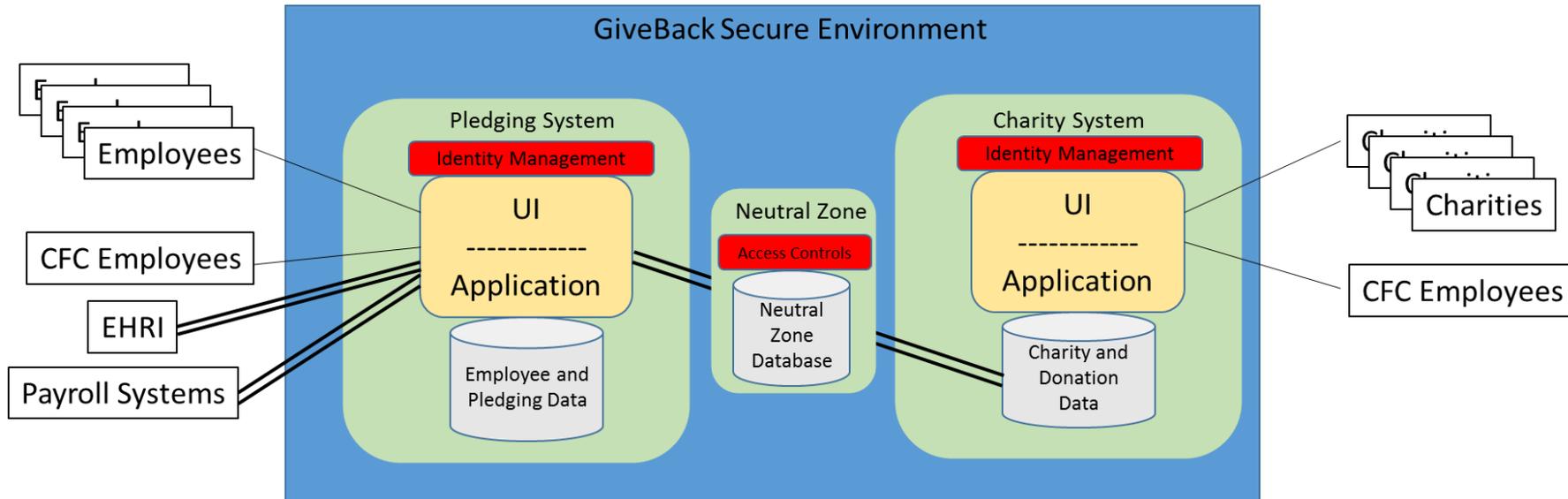
Step 7 - Contributors keep copy #3 for their records. Keep copies #1 and #2 together, report the totals on the Keyworker Envelope and turn them into your CFC point of contact.

TOP 5 COMMON ERRORS

1. Illegible. If it is unreadable, the pledge may not be processed correctly.
2. Monthly gift is listed as the annual gift - when specifying your gift to each agency fill in the ANNUAL AMOUNT.
3. Designation to an invalid agency code. The 5 digit code must be valid from the Local, National, International or Universal Giving Charity list available at www.rockymountaincfc.org or www.opm.gov/cfc.
4. Form isn't signed - payroll deduction can not be authorized if the form isn't signed.
5. Social Security Number is not provided - payroll deduction can not be authorized without the SSN. USPS Employees may use their USPS Employee ID #.



2017 Giving Process



★ Removal of Local Boundaries

- ★ One Platform for all Federal Agencies & Military Installations

- ★ Centralized Donor Relations

- ★ Centralized Website

Pledging

Traditional Form IG Audit Findings:

- ★ Illegible, if it is unreadable, the pledge may not be processed correctly
- ★ Monthly gift is listed as the annual gift
- ★ Designation to an invalid code; pledges can only be made to agencies listed in this region's brochure
- ★ Form isn't signed; payroll deduction cannot be authorized if the form isn't signed
- ★ Social security numbers is not provided; payroll deduction can not be authorized without the SSN; USPS employees may use their Employee ID#.

Thanks You Awards

Philanthropic Level
\$120 - \$1,199



Leadership Level
\$1,200+



- ★ Online Contributors print a track form and submit it
- ★ Traditional pledge form – request on pledge form
- ★ Donors don't give for the gift, but they can feel slighted if promised something they don't receive

Donor Appreciation Award Tracking

- ★ PCFO Tracking Form Provided for ECCs & Keyworkers
 - ★ Each KeyWorker keeps a list of their 25 co-workers with a check box of what gift that donor requests and whether or not they have received it
 - ★ Keyworkers submit contribution envelopes and gift tracking ledger to ECC/IPO or finance officer
 - ★ Keyworkers also submit thank you gift ledger electronically to ECC/IPO or finance officer
 - ★ ECC/IPO or finance officer cuts and pastes keyworker ledger info onto master gift tracking ledger

Online Donor Appreciation Award Tracking



Get Your Give **ON-Line**



One time credit card, cash,
check or recurring payroll
deduction



Only recurring payroll
deduction for participating
federal agencies

Federal Agency: _____

Donor Name: _____

Unit Name: _____

Unit Code: _____

- Gift Level: Philanthropist Level \$120 - \$1,199
 Leadership Level \$1,200 or above
 I prefer not to receive an appreciation gift.

Provided online for donor to print out and submit

Donor Appreciation Award Tracking



FALL 2016 - Rocky Mountain Combined Federal Campaign
 1716 North Main Street, Suite A140
 Longmont, CO 80501

DATE OF CONTRIBUTION: _____

CFC Campaign #: **0141**
 ATTENTION PAYROLL OFFICES:
Only use this number to identify the local campaign.

NFC City/State Code: **08-0600**

PLEASE USE A BALL POINT PEN & WRITE FIRMLY
 For a list of CFC charities, visit our website at www.rockymountaincfc.org

PRINT NAME LAST	FIRST	MIDDLE	INITIAL	<input type="checkbox"/> CIVILIAN <input type="checkbox"/> MILITARY	FEDERAL AGENCY AND OFFICE	SSN / EMPLOYEE ID
WORK ADDRESS & ZIP CODE					WORK PHONE	

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	Charity Code	ANNUAL AMOUNT
MILITARY PAYROLL Branch of Service?	\$	X 12 Months =	\$		\$
CIVILIAN PAYROLL	\$	X 26 Pay Periods =	\$		\$
OTHER	\$	CASH CHECK (payable to CFC), Check Number: _____			\$

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 GIFTS: To designate to one or more charities or federated groups, fill in the charity code(s) and dollar amount above. Undesignated gifts are distributed among all organizations in proportion to their pledges. A complete list of CFC agencies can be downloaded from the CFC website: www.RockyMountainCFC.org

INFORMATION RELEASE (OPTIONAL)
 Any information you enter below will be released, along with your name, to the charity(ies) to which you made a pledge. Do not enter your work address or e-mail.

Home Address: _____

Personal E-Mail Address: _____

In addition to my contact information, I authorize the CFC to release the amount of my pledge to the charity(ies) designated above.

Please check below if applicable or check here if you choose to decline your gift

Philanthropist Level I (\$120 to \$1,199) Leadership Circle (\$1,200+)

Annual CFC Collector's Coin 2016 US Mint Proof Coin Set

PAYROLL DEDUCTION AUTHORIZATION

I hereby authorize any agency of the United States Government by which I may be employed during 2017 to deduct the amount(s) shown above from my pay each pay period during the calendar year 2017 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 _____

PLEASE INITIAL IF YOU MAKE ANY CHANGES

OPM Form 1654 Revised May 2016

Copy 1 - Payroll Office



Donor Appreciation Award Tracking

Online Gift Form

- ★ Donor fills out and submits donor contribution confirmation form when contributing online
- ★ Keyworker includes tracking form in report envelope
- ★ Annotate gift request from contributor confirmation form on master tracking form

Traditional Pledge Form

- ★ Annotate gift request from pledge form on master tracking form

Tracking

- ★ Keyworker reports gifts needed on report envelope
- ★ ECC/UPO tracks Unit gift needs on master tracking form

Pledging

Traditional Pledge Form

★ **Hard copy/PDF Fill-in** - Payroll Deduction, check or cash

Pledge Form Gift Request

FALL 2016 - Rocky Mountain Combined Federal Campaign
 CFC Campaign # 01411
 ATTENTION: PAYROLL OFFICE
 Code: 08-0500

NAME: [] UNIT: [] CITY: [] STATE: [] ZIP: []
 WORK ADDRESS & ZIP CODE: [] WORK PHONE: []

CONTRIBUTION: This form shows the amount of your payroll deduction, cash or check contribution. Write in the total of your annual contribution in the space provided.

ALLOCATION SOURCE	AMOUNT	INTERVAL	TOTAL GIFT
MILITARY PAYROLL			
CIVILIAN PAYROLL	\$	X 12 Months =	\$
OTHER	\$	X 28 Pay Periods =	\$

INFORMATION RELEASE (OPTIONAL)
 I hereby authorize any agency of the United States Government to which funds are pledged during 2017 to check the appropriate award levels from my payroll deduction during the calendar year 2017. I understand that the award levels are subject to change from year to year and that the award levels are subject to change from year to year. I understand that the award levels are subject to change from year to year. I understand that the award levels are subject to change from year to year.

Donor Gift Request Form

EMPLOYEE PRESS
 myPay
 CFC NEXUS

Unit Name: _____
 Installation: _____
 Donor: _____
 Unit Code: _____

GIFT LEVEL: General Silver (one hour's pay per pay period)
 Eagle Silver Eagle Golden Eagle
 prefer not to receive a donor appreciation gift.

CFC of the Pikes Peak Region (0140)
KEYWORKER REPORT FORM

THIS REPORT IS: FIRST _____ ADDITIONAL _____ FINAL _____
 AGENCY OR INSTALLATION: U.S. Postal Service
 UNIT NAME: RAF - Team 1
 KEYWORKER: Dave Bassich
 TELEPHONE: 650-791-1111
 EMAIL: BassichD@usps.gov

Total Number of Employees in Your Unit: 311
 Total Number of Employees Contacted: 97
 Contacted Date: 9/7

METHOD OF PAYMENT	NUMBER OF DONORS	AMOUNT (\$)
U.S. CURRENCY	3 donors	\$ 31.00
CHECKS	5 donors	\$105.00
PAYROLL DEDUCTION	8 donors	\$3651.00
TOTALS	26 Total Donors	Total \$3787.00

FOR USE BY CFC ACCOUNTING AGENT:
 Number: _____
 Amount: _____
 Processed: _____
 Verified: _____
 Payroll Deduction: _____
 Cash Contributions: _____
 Total: _____

We have validated the contents of this envelope and confirm it contains the cash, checks and payroll deduction amounts reported above.

Keyworker: Angela ...
 Payroll Officer: _____
 Chairperson: _____
 PCFO: _____
 Date: _____

of Each Contained in this Envelope:
 Silver Award: 5
 Gold Award: 3
 Eagle Club: 8
 8760 to 8800: _____
 Golden Eagle Club: _____
 over: _____

Campaign Donor Award Reporting

Gift requests from Traditional forms, Nexus, EEX & myPay award appreciation confirmation forms are collected and recorded on the envelope.

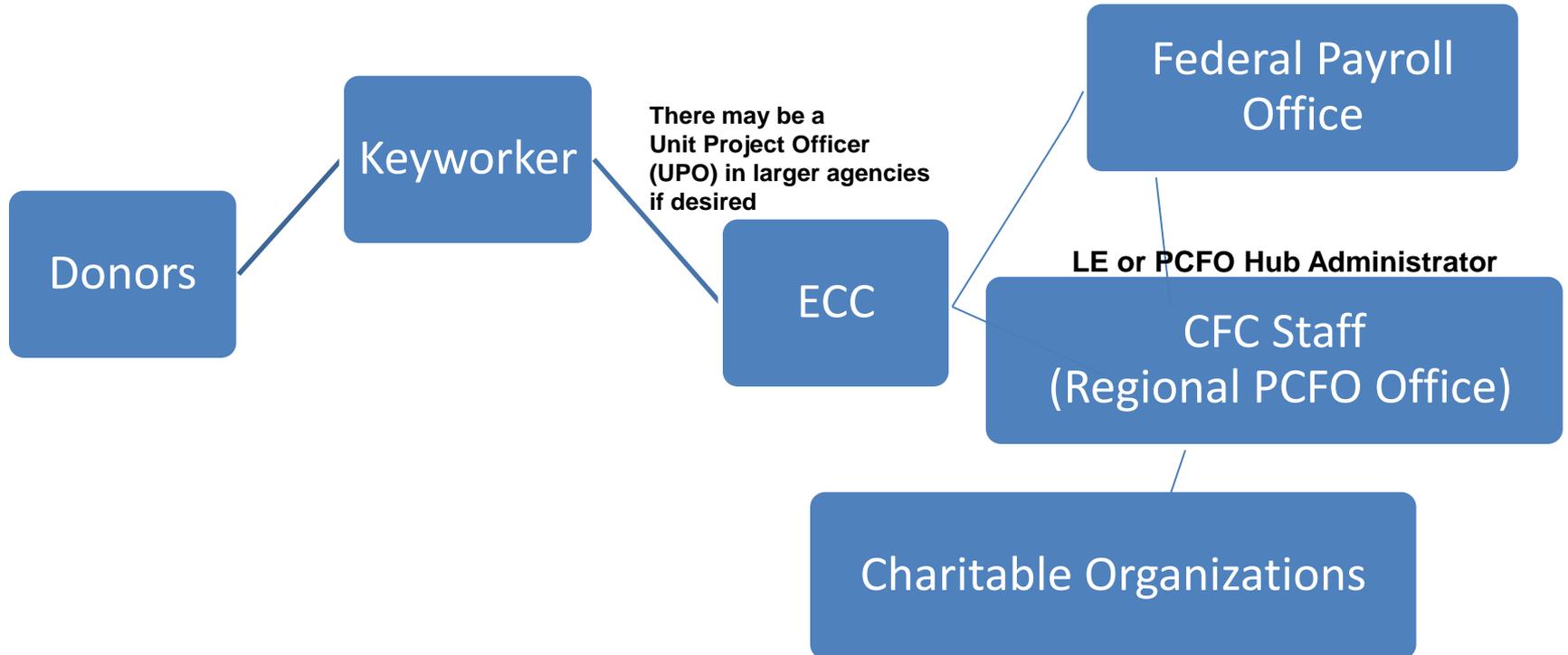
Available both in hard form and online as PDF fill-in form



Stretch Break

- ★ **What will I miss if I go to the Bathroom?!**
- ★ **Accounting and Reporting Procedures**
- ★ ***HURRY BACK!***

Turn-In Flow Chart



KeyWorker Turn-In Pledge Preparation

★ Collect pledges weekly

★ NEXUS

- ★ Print outs of **cash or check** contributions
Attach to cash or check with paper clip

- ★ **Do not collect credit card contributions** – collect appreciation award form

★ Traditional Pledge forms

- ★ Pledges must be reviewed for completeness, accuracy and legibility
- ★ DO NOT make changes to form; contact donor

★ EEX & myPay pledge thank you gift confirmation form collection ONLY

★ Collect and verify forms:

- ★ Ensure donor's name and e-mail address is included
- ★ Ensure unit/office code is completed
- ★ Ensure gift request is completed

- ★ Report totals of each pledge type (cash, check and traditional payroll pledges) on report envelope;

- ★ Report number of gifts requested on report envelope

Campaign Reporting

Contribution Collections Tips

- ★ Keyworkers Collect Contributions &/or Confirmation Forms Weekly
 - ★ PII & OSI Compliance –remove cover when submitting to ECC
 - ★ KeyWorkers make regular time to turn in report envelope with ECC
 - ★ Ensure your turn-in leaves plenty of time for both KeyWorker and ECC to verify envelope content and sign off on report envelope for chain of custody (IG compliance)
 - ★ Recommend one day prior to ECC turn-in

KeyWorker Turn-In

Envelope Verification - Weekly Turn-Ins with UPO/ECC

- ★ Collect and Verify Report envelopes for Weekly Turn-In
 - ★ Verify # of each type of pledge in envelope
 - ★ Verify \$ of each type of pledges reported
 - ★ Verify e-pledging appreciation award confirmation forms
 - ★ Collect and verify forms:
 - ★ Ensure donor's name is on form
 - ★ Ensure donor's e-mail address is included
 - ★ Ensure unit/office code is completed
 - ★ Ensure gift request is completed
- ★ Sign off on report envelope once content and report are verified

Key Worker Turn-Ins

NEXUS cash & Check
Forms ONLY



Traditional Forms

CFC of the Pikes Peak Region (0140)
KEYWORKER REPORT FORM

THIS REPORT IS: FIRST _____ ADDITIONAL _____ FINAL _____

AGENCY OR RETAILER: U.S. Postal Service

UNIT NAME: SAF - TOUR 1 Total Number of Employees in Your Unit: 311

KEYWORKER: Davey Bannick Total Number of Employees Contacted on Date: 97

TELEPHONE: 650-751-1111

EMAIL: Bannick@peaks.com

Keyworker Instructions

1. Fill in the SUMMARY INFORMATION REQUIRED. BELOW FOR THOSE CONTRIBUTIONS CONTAINED IN THIS ENVELOPE. CHECK INCLUDE ANY INFORMATION PREVIOUSLY SUBMITTED.
2. INDICATE THE NUMBER OF CONFIDENTIAL ENVELOPES ENCLOSED:
Number of Confidential Envelopes Enclosed: 0
3. Piece of completed background cards, copy, attached to the envelope enclose to your Point of Contact.
4. With your Chairperson, validate the contents of the information in the bottom left horizontal.
5. Make a list: cover the faced the envelope your records.

BATCH #

NUMBER OF PAYMENTS	NUMBER OF DONORS	AMOUNT (\$)
U.S. CURRENCY	<u>3</u> donors	<u>\$ 31.00</u>
CHECKS	<u>5</u> donors	<u>\$105.00</u>
DEDUCTION	<u>1</u> donors	<u>\$3651.00</u>
TOTALS	<u>26</u> Total donors	<u>\$3787.00</u>

FOR USE BY CFC ACCOUNTING AGENT

Number: _____
Amount: _____
Processed: _____
Verified: _____
Payroll Deduction: _____
Cash Contributions: _____
Total: _____

WEEK # _____ **CFC #** _____

We have validated the contents of this envelope and confirm that it contains the cash, checks and payroll deduction amounts reported above.

of Each Contained in this Envelope.

Keyworker: Davey A. Bannick 5 Silver Award
Project Officer: _____ 3 1 hour pay per month
Chairperson: _____ 3 Gold Award
PCFO: _____ 0 2 hours pay per month
Date: _____ 1 Eagle Club
1 876 to 888 Golden Eagle Club
1 \$1,000 and over

Campaign Reporting

The ECC/IPO followed by the Department/Mission Element Project Officers will collect all KW envelopes, verify the contents and turn in to IPO/Finance Officer weekly. IPO/finance officer will re-verify the content of the envelopes with the ME project officer. A chain of custody transition form on the envelope will be signed by the all parties at each level of turn-in. (IG Compliance)



Department/Unit Project Officer Turn-In

ECC or IPO Collection from Department or Unit POC

- ★ If collecting from larger organizations that have multiple departments, offices, units or even shifts (sub-sections), the DPO or UPO will track and turn in those pledges by the corresponding subsection. (ie HR, Finance, Customer Service etc. or Squadron 1, Squadron 2 etc) This ensures proper credit to each part of that organization AND if donor information has to be verified, it provides for a contact closer to the donor to validate.
- ★ Each of these subsections should have envelope tracking 1 of 4, 2 of 4, 3 of 4, 4 of 4 on the reporting envelope, which would then be rubber banded together by the DPO or UPO.
- ★ ECC / IPO or designated Finance officer will record multiple envelopes on organization ledger & turn-in to PCFO.

Department/Mission Element Turn-In

Ledger

Date: _____
 Federal Agency: _____
 Agency Code: _____
 Agency Location: _____
 Chairperson Name: _____
 Contact Information: _____

Rocky Mountain Combined Federal Campaign (0141)
 (720) 352-5076 - Cari Allen (Civilian Campaigns)
 (719) 531-5501 - Barbara Barfield (Military Campaigns)
 (720) 999-2015 - Irma Jones (Central Receipts Manager)

PLEASE itemize each keyworker envelope physically included with this report - provide a fresh report with each turn in. After completing the form - please e-mail to your Campaign Point \$ Payroll

Office/Department	Keyworker	# of Cash	\$ Cash Amount	# of Checks	\$ Check Amount	# of Payroll Deduction	Deduction Amount	Total Donors	\$ Total Donations
								0 \$	-
								0 \$	-
								0 \$	-
								0 \$	-
								0 \$	-
								0 \$	-
								0 \$	-
								0 \$	-
								0 \$	-
								0 \$	-
								0 \$	-
								0 \$	-
								0 \$	-
								0 \$	-
								0 \$	-
								0 \$	-
TOTALS		0	\$ -	0	\$ -	0	\$ -	0 \$	-

Chairperson Signature: _____ PCFO Signature: _____
 Date: _____ Date: _____



Why do I have to do All of This

1. OIG tracking

- ★ All pledge envelopes must be accounted for at all times
 - ★ If pledge envelopes were to be misplaced, the ECC/IPO would know from the ledger what envelopes were unaccounted for
 - ★ If the PCFO were to misplace envelopes the hub director could go back to the Ledger to track the date of the turn-in.

Why do I have to do All of This

2. OPM Personal Identifying Information (PII) & Other Sensitive Information (OSI) Memorandum

- ★ OPM generally defines PII as information that:
 - ★ Can be used to discern or trace a person's or entity's identity; and alone or combined with other information can be used to compromise the integrity of agency records relating to a person by permitting access to unauthorized disclosure of these records
- ★ Pledge form

PII Compliance

OPM Personal Identifying Information (PII) & Other Sensitive Information (OSI) Memorandum

- ★ OPM defines OSI as any information:
 - ★ Related to the Federal donor or charitable entity that could alone, or combined with other information, be used to commit fraudulent acts against the Federal donor or charitable entity. For example, a donor's home address, bank account number or routing number would constitute other sensitive information.

PII Compliance

OPM Personal Identifying Information (PII) & Other Sensitive Information (OSI) Memorandum

★ Campaign Responsibilities

- ★ It is the local campaign's responsibility to ensure it has implemented adequate controls to protect against the unauthorized release and misuse of personally identifiable and other sensitive information. Local campaigns are responsible for the proper handling of PII and OSI, regardless of location.

PII Compliance

OPM Personal Identifying Information (PII) & Other Sensitive Information (OSI) Memorandum

- ★ Campaign Responsibilities
 - ★ Restricting access to PII and OSI to only those individuals who have a business need for it
 - ★ Keeping paper documents with PII or OSI in locked storage rooms or safes which can only be accessed by authorized users or security personnel

PII Compliance

OPM Personal Identifying Information (PII) & Other Sensitive Information (OSI) Memorandum

- ★ Reporting PII Breaches

- ★ A breach of PII or OSI includes the actual or suspected loss of control, compromise, unauthorized disclosure, unauthorized acquisition, or unauthorized access of PII or OSI whether physical or electronic

PII Compliance

OPM Personal Identifying Information (PII) & Other Sensitive Information (OSI) Memorandum

★ Reporting PII Breaches

- ★ In accordance with 5 CFR § 950.104(b)(13) a LFCC is required to immediately report to OPM all potential PII data and OSI breaches -- whether they involve paper documents or electronic information. Potential PII data and OSI breaches must be reported within 30 minutes of discovery via telephone on (202) 606-2564 or email at cfc@opm.gov to OPM.

PII Compliance

OPM Personal Identifying Information (PII) & Other Sensitive Information (OSI) Memorandum

★ Reporting PII Breaches

- ★ Both actual and suspected breaches should be reported, even if it is believed the breach is limited, small, or insignificant. In addition, the LFCC is reminded of its obligation to report all security incidents involving PII to US-CERT within the Department of Homeland Security (see US-CERT web site at <http://www.us-cert.gov/federal/reportingRequirements.html>) and providing notification to victims of PII or OSI breaches, as appropriate.

Solicitation Conclusion

- ★ Electronic Giving turned off COB Dec 15 (regulations)
- ★ All Contributions Received by DPO or UPO: December 16
 - ★ Ensure CFC Staff has your totals for Awards
- ★ Final Turn-ins scheduled with PCFO Dec 16 – 20
 - ★ Ensure CFC Staff has your totals for Awards
- ★ Final Turn-Ins scheduled with PCFO Dec 16- 20
 - ★ Ensure Donors receive appreciations awards

Campaign Recognition

2016 Agency Hero Nominations

- ★ All Federal Agency Campaign Team members may be nominated
 - ★ Submit Hero Nominations by December 15
 - ★ Nominate anyone you see going above and beyond during the Campaign
 - ★ Heroes are selected by the LFCC and honored at the Campaign Celebration
 - ★ Heroes may also be submitted to National Awards Committee for National recognition

Campaign Recognition

Unit, Department and Organization Awards

- ★ Gold, Silver & Bronze Awards
 - ★ Benchmark: 5% above 2015 campaign – Silver award
 - ★ 75% of Benchmark – Bronze award
 - ★ 125% of Benchmark – Gold Award
- ★ Award Distribution – ECCs and IPOs receive awards from PCFO – January
 - ★ Internal organization presentation
 - ★ CFC Commander's call
 - ★ Staff Meeting

Campaign Recognition

2016 Certificates of Appreciation

- ★ Recognize all Keyworkers & Campaign Volunteers
 - ★ Track name, department, agency
 - ★ Agency generated & provided
 - ★ PCFO template provided
 - ★ Use certificate template provided
 - ★ May request them to be PCFO generated
 - ★ Forward completed template form list to PCFO Hub Director
 - ★ PCFO generated and provided mid January

Q&A:

Questions?

2016



Thank you for leading the campaign

