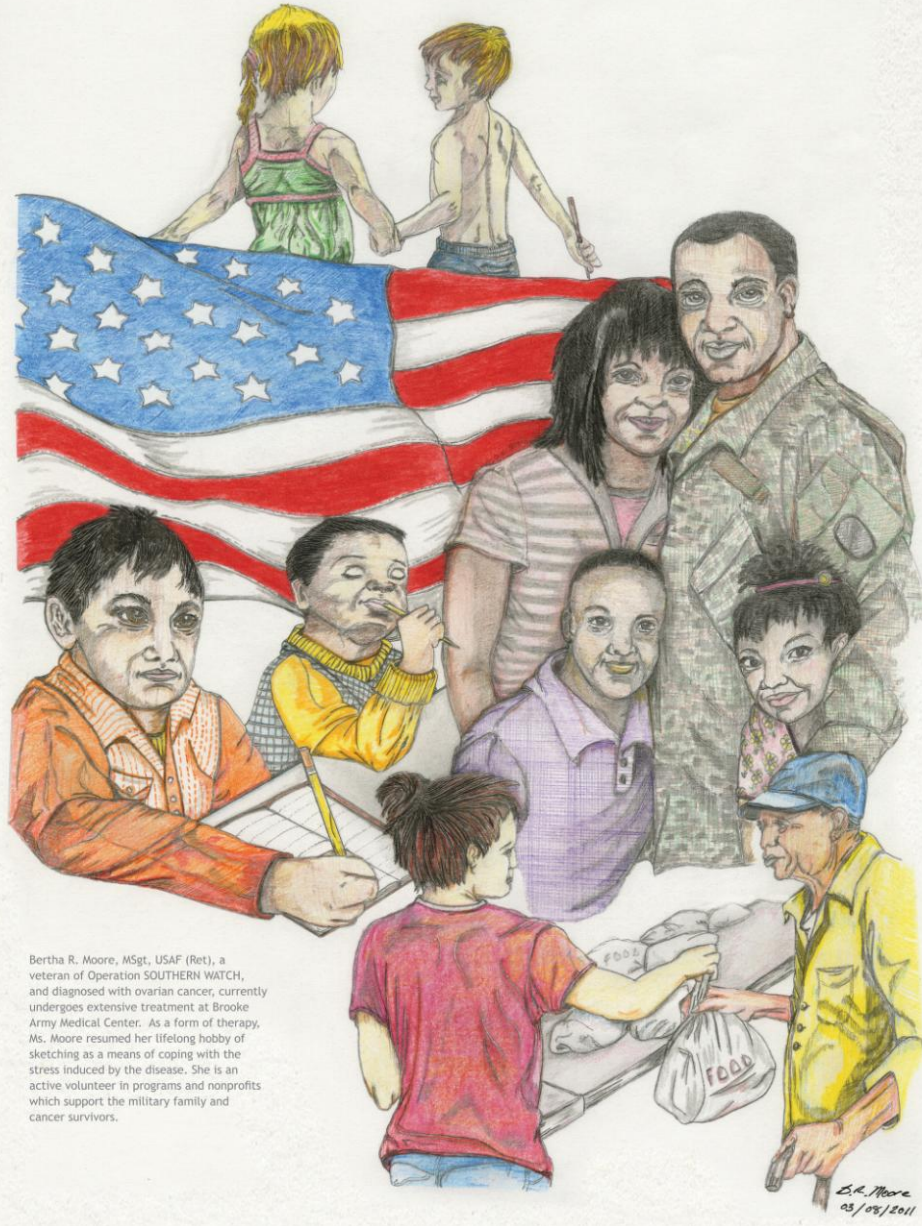


# Supporting a Caring Community



Bertha R. Moore, MSgt, USAF (Ret), a veteran of Operation SOUTHERN WATCH, and diagnosed with ovarian cancer, currently undergoes extensive treatment at Brooke Army Medical Center. As a form of therapy, Ms. Moore resumed her lifelong hobby of sketching as a means of coping with the stress induced by the disease. She is an active volunteer in programs and nonprofits which support the military family and cancer survivors.

## San Antonio Area — Combined Federal Campaign Project Officer

### 2011 CAMPAIGN HANDBOOK



# San Antonio Combined Federal Campaign

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# 2011 Campaign Guide

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## 1. PURPOSE OF THIS GUIDE

This guide is to provide a detailed source of information regarding the conduct of the 2011 San Antonio Combined Federal Campaign (CFC). A glossary of terms of reference is at Enclosure (1).

## 2. CFC HISTORY

The CFC began in 1961, as the result of requests from Federal employees to eliminate the disruption of year-round on-the-job solicitations by charitable organizations. President Kennedy, by Executive Order, directed that the Office of Personnel Management (OPM) develop a once-a-year workplace campaign for all Federal employees, including the military services and the U.S. Postal Service.

The CFC was established as a “designation campaign” and offered donors the convenience of using payroll deduction for their charitable contributions. The Combined Federal Campaign requires that all participating charitable agencies apply annually for inclusion in the campaign. The agencies must demonstrate to a committee of Federal employees that they maintain sound fiscal management, exhibit high integrity of conduct, and serve the community as a human health and welfare organization. From the list of agencies, donors may designate their donations, confident that the charity utilizes its resources properly and conducts its services with a high degree of competency.

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## 3. SCHEDULE OF EVENTS

Project Officer Selection.....	May – Aug
Project Officer Training.....	15 July & 22 July (29 July if needed)
Loaned Executive Selection.....	8 July
Loaned Executive Training.....	29 Jul – 5 Aug
Campaign Material Distribution.....	Aug
Key Worker Training.....	Aug - Oct
Campaign Window.....	1 Sep – 15 Dec
Payroll Deduction Pledge Cards to Payroll Office.....	Prior to 15 Dec

# San Antonio Area Combined Federal Campaign

## CAMPAIGN PREPARATION & PLANNING

**Objective: “TELL EVERYONE WHAT CFC IS ABOUT”**

Campaign Strategies	<ul style="list-style-type: none"> <li><input type="checkbox"/> Educate all personnel about CFC (many misconceptions exist)</li> <li><input type="checkbox"/> Seek senior executive’s support</li> <li><input type="checkbox"/> Plan training for Key Workers</li> <li><input type="checkbox"/> Plan for Project Officer to be recognized as “the expert”</li> <li><input type="checkbox"/> Review previous campaign results</li> <li><input type="checkbox"/> Coordinate distribution of Charity List &amp; Pledge Cards to all personnel</li> <li><input type="checkbox"/> Schedule group presentations</li> <li><input type="checkbox"/> Schedule one-on-one presentations</li> <li><input type="checkbox"/> Plan follow-up for personnel on leave/TDY</li> <li><input type="checkbox"/> Plan donor recognition (timeliness &amp; accuracy)</li> </ul>
Conduct of the Campaign	<ul style="list-style-type: none"> <li><input type="checkbox"/> Schedule campaign to run for only a <u>short period</u> of time</li> <li><input type="checkbox"/> Educate <u>everyone</u> about CFC (there are a lot of misunderstandings)</li> <li><input type="checkbox"/> Ensure <u>senior executive</u> is involved and visible</li> <li><input type="checkbox"/> Organize to ensure key worker <u>personally contacts</u> every person</li> <li><input type="checkbox"/> <u>Distribute</u> Charity List &amp; Pledge Cards by personal contact</li> <li><input type="checkbox"/> Don’t ask people to give to CFC, rather ask them to <u>give through</u> CFC</li> <li><input type="checkbox"/> <u>Follow-up</u> on those not contacted</li> <li><input type="checkbox"/> Distribute <u>donor recognition</u> items as soon as possible</li> <li><input type="checkbox"/> Deliver all <u>payroll deduction pledge cards</u> (yellow copies) to payroll office</li> <li><input type="checkbox"/> <u>Conclude</u> campaign on time</li> </ul>
Project Officer Selection	<ul style="list-style-type: none"> <li><input type="checkbox"/> Preferably a volunteer</li> <li><input type="checkbox"/> An individual respected by fellow workers</li> <li><input type="checkbox"/> An individual with enthusiasm</li> <li><input type="checkbox"/> An individual who believes in CFC</li> </ul>
Senior Executive Support	<ul style="list-style-type: none"> <li><input type="checkbox"/> Present Campaign Plan to senior executive for approval. (See enclosure (2))</li> <li><input type="checkbox"/> Request support and discuss:             <ul style="list-style-type: none"> <li>○ Strategies of activity’s campaign timing and events</li> <li>○ Personal time to receive training from Loaned Executive (approx. 3 hours)</li> <li>○ Personal time requirements for coordination &amp; conduct of campaign</li> <li>○ Selection &amp; training of key workers (1 for every 35 / 50 personnel)</li> <li>○ Senior executive’s endorsement of campaign (see enclosures (3) &amp; (4))</li> <li>○ Mid-manager support of needed personnel and time to conduct campaign</li> <li>○ Provide senior executive a copy of Handbook</li> <li>○ Show senior executive the campaign video</li> <li>○ Senior executive’s verbalization of support in all meetings</li> <li>○ Senior executive’s participation in kick-off event</li> </ul> </li> </ul>

## San Antonio Combined Federal Campaign

Key Worker(s)	<ul style="list-style-type: none"> <li><input type="checkbox"/> Selection: (1 for every 35 / 50 personnel in activity) <ul style="list-style-type: none"> <li>○ Preferably a volunteer</li> <li>○ An individual respected by fellow workers</li> <li>○ An individual with enthusiasm</li> <li>○ An individual who believes in CFC</li> <li>○ An individual who has the time to contact all assigned individuals</li> </ul> </li> <li><input type="checkbox"/> Training: <ul style="list-style-type: none"> <li>○ Your Loaned Executive will provide training</li> <li>○ Conduct training using procedures set forth in this Guide (see Enclosure (5))</li> </ul> </li> <li><input type="checkbox"/> Meeting: <ul style="list-style-type: none"> <li>○ Convene a meeting of all key workers and discuss: <ul style="list-style-type: none"> <li>◇ Campaign strategy &amp; time schedule</li> <li>◇ Distribution of materials</li> <li>◇ Method of contact (group presentations / one-on-one)</li> <li>◇ Coercion &amp; pressure</li> <li>◇ Follow-up procedures</li> <li>◇ Ensure personal contact with personnel assigned</li> <li>◇ Handling of money and pledge cards</li> <li>◇ Tracking donors &amp; donor recognition</li> <li>◇ Reports and administration</li> </ul> </li> </ul> </li> </ul>
Pre-campaign Publicity	<ul style="list-style-type: none"> <li><input type="checkbox"/> Post CFC posters throughout activity</li> <li><input type="checkbox"/> Show campaign video on closed circuit TV (if available)</li> <li><input type="checkbox"/> Commence running CFC notes in newsletters (see Enclosure (6))</li> <li><input type="checkbox"/> Develop and distribute a senior executive letter or memo (see Enclosure (3))</li> <li><input type="checkbox"/> Publicize activity's goal (if applicable)</li> <li><input type="checkbox"/> Publicize names of activity coordinator &amp; key workers</li> <li><input type="checkbox"/> Request senior executive make remarks on CFC at all meetings and events</li> </ul>
Kick-off Event	<ul style="list-style-type: none"> <li><input type="checkbox"/> Event publicizes the beginning of campaign period</li> <li><input type="checkbox"/> Event offers an opportunity for senior executive to endorse CFC</li> <li><input type="checkbox"/> Event offers an opportunity to have boss of the boss express support for CFC</li> <li><input type="checkbox"/> Event offers an opportunity for an agency speaker to inform activity of work being done</li> <li><input type="checkbox"/> Event offers an opportunity to have an in-house testimonial by member of activity</li> <li><input type="checkbox"/> Event offers an opportunity to show the video</li> </ul>
Campaign Procedures	<ul style="list-style-type: none"> <li><input type="checkbox"/> Weekly meetings with key workers <ul style="list-style-type: none"> <li>○ Turn in pledge cards and money</li> <li>○ Track key workers' progress</li> <li>○ Resolve problems</li> </ul> </li> <li><input type="checkbox"/> Weekly meeting senior executive <ul style="list-style-type: none"> <li>○ Update progress</li> <li>○ Resolve problems</li> </ul> </li> <li><input type="checkbox"/> Obtain additional materials from CFC office at (210) 352-7023</li> <li><input type="checkbox"/> Obtain donor recognition items from CFC office or Loaned Executive</li> <li><input type="checkbox"/> Resolve campaign problems with Loaned Executive</li> <li><input type="checkbox"/> Obtain quick response to questions through CFC office at (210) 352-7023 or by e-mail at <a href="mailto:jswinarsky@unitedwaysatx.org">jswinarsky@unitedwaysatx.org</a></li> </ul>

# San Antonio Area Combined Federal Campaign

## 4. CFC ORGANIZATION

Local policies and procedures are set and implemented by the San Antonio Local Federal Coordinating Committee (LFCC). The LFCC chair is General Edward Rice Jr., USAF, Commander, Air Education and Training Command.

## 5. ORGANIZATION CAMPAIGN PLAN

Each activity is requested to develop a campaign plan that describes how it will conduct its CFC. The plan brings together a variety of planning factors and resources to achieve a successful campaign. Enclosure (2) is a campaign plan, along with instructions for completion. The campaign plan should be completed by the project officer, and then approved by the activity's senior executive.

## 6. SOLICITATION

Solicitation of pledges is to be conducted during normal working hours using methods that encourage voluntary giving and provide an individual the option of confidentiality.

## 7. DESIGNATIONS

Designations may be made only to agencies listed in the 2011 San Antonio CFC Charity List. "Write-in" is not permitted. Using any 5-digit code (previous year's brochure, other CFC's brochure, or an erroneous entry) will result in the funds being misdirected or treated as "undesignated".

More than five designations - complete a second pledge card filling out ONLY the DONOR INFORMATION and DESIGNATION sections. Staple the two cards together.

## 8. METHODS OF DESIGNATING

Designate to a specific agency - enter the agency's 5-digit code from the San Antonio CFC Charity List in the appropriate box in the DESIGNATION section of the pledge card.

Undesignated gift - leave all boxes in the DESIGNATION section of the pledge card blank.

Designate to all international agencies in the brochure - enter 5-digit code "11111" in a DESIGNATION box on the pledge card.

## 9. METHODS OF GIVING

Payroll Deduction - enter the amount to be withheld per pay period in the CONTRIBUTION section of the pledge card. Calculate and enter the annual amount of the gift by multiplying the per pay period amount by the appropriate number of periods (x12 for military / x26 for civilians). The minimum payroll deduction authorized is \$1.00 per pay period.

Cash or Check - enter the total amount of the contribution on the appropriate "Military & Civilian Cash or Check" line.

Confidential Gift - after completing the pledge card, the donor should detach and retain the Contributor's Copy (pink). Place all other copies of the pledge form in a plain envelope, along with the cash or check donation, and seal the envelope. Mark the front of the envelope "Confidential Gift" and turn it into the coordinator or key worker. The envelope will remain sealed until opened by an audit clerk at the CFC audit point. At the audit point, the contribution amount will be recorded on the activity's Progress Report form and the amount of the confidential gift will be added to the activity's total for that report. Note: if a donor elects to use payroll deduction, a degree of confidentiality will be lost because the payroll copy of the pledge card will be returned to the activity coordinator for delivery to the donor's payroll office.

## 10. FUNDRAISING EVENTS

Raffles, lotteries, auctions, bake sales, carnivals, athletic events or other activities are permitted, if approved by the organization's agency head or governmental official. Such events must be conducted consistent with ethics regulations and be

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open to all members of the activity on an equal basis. There cannot be any “condition of giving” to participate. The activity is required to advise all participants that his or her donation will be counted as an undesignated gift. Activities will report the proceeds for an event by completing one pledge card, using the activity’s name as the donor’s name in section 1 on the card and leaving the DESIGNATION section blank. Call 210-352-7023 if there are questions.

### 11. GIVING DIRECTLY TO AN AGENCY

The most efficient way to make a charitable contribution to an agency is to deliver the gift directly to that agency. However, the CFC offers the donor the convenience of making a contribution using payroll deduction. Additionally, CFC contributions will actually reduce the overhead costs of an agency. For example: If an agency spends \$100 and raised \$1,000, its administrative cost is 10%. If the agency receives \$200 through CFC, the agency has now raised \$1,200, but has still only spent \$100 in fundraising expenses. *(There is no cost to an agency to apply and be listed in the CFC.)* As a result, the agency’s administrative costs have been reduced to 8.3%.

### 12. PROHIBITED PROCEDURES

- **Direct solicitation of personnel by their supervisor...** This does not prohibit supervisors and executives from encouraging subordinates to consider participating in the CFC or in campaign events. It does not prohibit executives from exhibiting their support of the CFC.
- **Setting of 100% participation as a goal...** A goal of 100% “**meaningful contact**” is allowed.
- **Use of charity lists, and/or non-charity lists, for anything other than the routine collection and forwarding of contributions and allotments...**
- **Setting an “expected” or specific gift amount that someone should donate...**

- **Inquiries by executives and supervisors about whether a person chooses to participate or not...** Supervisors may be provided only summary information.
- **Permitting the size of an individual’s donation to influence a performance evaluation...** Coordinator or Key Worker activities should be recognized for their community service in support of the campaign.
- **Endorsing or criticizing any charitable organization, its services or programs, to any Federal employees...**

### 13. CHARITY LIST *(copy available to all members of activity)*

It is in the form of a booklet that provides a listing of all eligible charitable organizations to which the donor can direct pledges. The brochure is divided into three sections:

- 1) General information and instructions.
- 2) Agency listings with 25 word statements describing the services offered. The listing is divided into three areas, local organizations, national/international organizations, and international organizations.
- 3) An alphabetical index of all organizations listed in the brochure.

### 14. PLEDGE CARD

*(copy to all members of the activity)*

A three part, multi-colored form used to record donor information, method of contribution, designation data, name/address/pledge amount, release provisions, donor recognition, and payroll deduction authorization. The pledge card is designed as an OCR form that is scanned for data entry. Donors should print all entries in capital letters using a ballpoint pen. Cards should not be folded or cut.

- 1. DONOR INFORMATION section: To be completed in full by each donor.
- 2. CONTRIBUTION METHOD section: Donor selects and completes the appropriate line from among the two

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choices. For payroll deduction, donor enters pay period withholding amount, then calculates the annual contribution by multiplying by 12 for military and 26 for civilians. Payroll deductions must continue for at least 3 months. Checks must be made payable to the Combined Federal Campaign.

- 3. DESIGNATION section: Space for up to five charitable agency designations is provided. Donor should enter the 5-digit code from the 2011 San Antonio CFC Charity List for each agency the donor wishes to designate. Enter the annual gift amount for each designation then total all annual designation amounts (including a second / third page if used). Note: the sum total of designations cannot exceed the total amount contributed. If the sum total of designations is less than the total amount contributed, the remaining amount will be treated as an “undesigned” gift.
- 4. RECOGNITION OPTIONS section: The donor should complete the information requested if the donor wants to release that information to the designated charities. In addition, if the donor wants the pledge amount released to the designated charities, the donor must check the box at the bottom of the section.
- 5. PAYROLL DEDUCTION AUTHORIZATION section: The donor must sign and date the authorization. Ensure that the donor has entered his or her social security number or employee ID number. The SSN or Employee ID is necessary to activate a payroll deduction

PAYROLL OFFICE COPY (yellow) - This copy must be signed in order to activate an allotment. The activity coordinator should bundle together all yellow copies of payroll deductions and deliver them to the organization’s payroll office.

AUDIT COPY (white) - The activity coordinator will bundle white copies into batches of no more than 100 cards and turn

them in to the CFC audit point. The cards should be separated into five stacks:

- 1) All cash contribution cards;
- 2) All check contribution cards;
- 3) All military payroll deduction cards;
- 4) All civilian payroll deduction cards;
- 5) All sealed envelopes.

Each batch of pledge cards should be attached to a Bundle Report Form #4 and delivered to the CFC Cashiers Cage / Audit Point, 700 South Alamo, San Antonio TX 78205

CONTRIBUTOR’S COPY (pink) - This copy is to be retained by the donor for his or her personal records. Note: The IRS requires a verification letter for charitable contributions made by cash in excess of \$250. The CFC office will automatically mail to the donor a confirmation letter if the donor releases his/her mailing information.

### 15. CAMPAIGN VIDEO

The 2011 National CFC video will be used exclusively in the San Antonio CFC and is designed to assist coordinators and key workers since it “makes the ask”.

Repetitive showing of the video on closed circuit TV (where available) is one way to advertise the CFC. One DVD will be available from your Loaned Executive. Additional copies are at the CFC Central Office or can be downloaded from the CFC website. [www.cfcsanantonio.org](http://www.cfcsanantonio.org)

### 16. GROUP PRESENTATIONS

This is the most efficient method of contacting all personnel in your organization. Also, it is the easiest way to offer a number of people an opportunity to see the DVD and receive their brochure and pledge card. Additionally, it is the best way for the senior executive to provide visible support. It provides an excellent opportunity to hear an agency guest speaker or have an activity member tell his or her own story. An outline for a group presentation is at enclosure (7).

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### 17. AGENCY SPEAKERS

An agency speaker can tremendously enhance a group presentation and add a powerful “ask” to an activity’s campaign.

**Every group presentation should have one agency speaker.** The San Antonio CFC maintains a list of speakers for the agencies in the brochure that participate in the speakers program. The CFC provides guidelines and the agency speakers have agreed to abide by them.

The guidelines are as follows:

- The primary purpose of the speaker is to encourage the Federal employees to participate in the CFC. As such the speaker is representing all agencies listed in the brochure.
- The speaker should use examples of how donations convert to services and support; this is the opportunity to talk about the speaker’s agency.
- The speaker should not solicit for a particular agency, nor provide the agency’s 5-digit CFC code number to the audience as part of the presentation.
- The speaker may NOT put out educational material on the agency or make it available after the presentation for those seeking more information.
- The speaker may not show their agency’s video. The CFC video is the only video that will be used.

The Organization Project Officer can request an agency speaker through the Loaned Executive or from the CFC office by calling Diane Talamantez, 210-352-7047. A coordinator can request a specific agency or speaker and the CFC staff will attempt to accommodate the request.

Once a speaker is assigned, the CFC staff will advise the Project Officer and provide the name and the telephone number of the speaker. The Project Officer is then responsible for contacting the agency speaker and coordinating all aspects of the speaker’s visit.

The following provides some consideration when planning to use guest speakers.

- The responsibility to make and maintain contact with the agency speaker belongs to the Project Officer. Make sure that you contact the speaker immediately after you get the name. If you are unable to reach the speaker, keep trying until you are successful or let the assigned CFC Loaned Executive or CFC office know that you have been unable to make contact.
- Pay attention to the details. Let the speaker know about the audience: the number in attendance, their knowledge of the CFC and the agency, their mission or regular duties.
- Advise the speaker of your general plan. For example, the coordinator will start the presentation followed by the commanding officer. Then you will show the CFC video and afterwards introduce the guest speaker. Tell the guest speaker how much time he/she will have (five minutes is sufficient).
- Determine whether the speaker has any special needs; for example, wheelchair, cannot climb stairs.
- Advise the speaker of any factors about the location that may be of concern.
- Arrange for a time and place to meet. Be prepared to give the speaker clear directions to your meeting place. Try to pick an easily recognizable point for linking up with the speaker. Advise the speaker of any special requirements for admission to your location. You should be prepared to facilitate the speaker’s entry to the base. Arrange for parking.
- Let the speaker know what time you want him or her to arrive. Advise the speaker of any factors affecting travel time. Plan for delays in getting through security, finding a parking spot, movement from the parking area to the location for the presentation.

## San Antonio Combined Federal Campaign

- Remember that the Project Officer is inviting the agency speaker to be a guest in order to enhance the PO's presentation.
- Treat the agency speaker as a guest of the activity's senior executive or the commanding officer. Roll out the red carpet and you will be surprised at the results.
- Determine beforehand if the senior executive or the commanding officer wants to meet with the speaker before the presentation.
- Check your introduction of the speaker with the speaker to ensure that your information is correct before passing erroneous information to the audience.
- Plan to get the speaker back off the facility after the presentation.

Most of the guest speakers are volunteers and some will travel long distances at early hours to get to your presentation. Make sure you have established a communications plan with the speaker to advise of late breaking developments that may alter the timing of your presentation.

Make sure that the senior executive or the commanding officer is aware of the group presentation, has it on his or her schedule, and knows that you have a guest speaker.

Advise the CFC office if you encounter problems with any guest speaker.

### 18. ONE-ON-ONE PRESENTATIONS

Not everyone will be able to attend a group presentation. These individuals should be contacted on a one-on-one basis. Remember, the objective is to "inform" everyone of what CFC is about and to dispel myths (see paragraph 20.) Therefore, in a one-on-one presentation, sell the opportunity to participate and use payroll deduction as a means of contributing to one's charitable organizations.

### 19. HANDLING OBJECTIONS

Objections are not personal - Normally someone is focused on what they perceive CFC to be. In most cases, the view is based on misinformation.

Don't Argue - Taking an opposing viewpoint appears argumentative. Step back (literally step back); listen to what the person says, and then use the Reflect-Deflect System.

Reflect-Deflect - This method of countering objections makes it unnecessary for you to argue because you are perceived as accepting the other person's position.

- Reflect: You reflect an objection by accepting it then by asking a question. This causes the individual to express his or her position in different words, usually in more detail and from a different viewpoint. As a result, they will find themselves thinking more deeply about their objection and will sometimes recognize that their view is not logical.

Examples of reflect statements: "I can appreciate that..." "I see your point..." "That's a normal reaction..."; "I'm not surprised to hear you say that..." In each case, follow with a question, such as: "Why do you feel... (Repeat the objection exactly as the individual stated)?", "What do you think the reason is for...?", or "Why do you suppose it's done that way?"

- Deflect: After the objection is reflected, deflect it by restating the objection, then adding a positive comment.

Examples of deflect statements are: "I can understand why you feel that there are too many agencies, but one of the advantages of the CFC is to provide a wide variety of choices.", or "You're right, there are a lot of agencies listed in the brochure. Since each agency has met stringent standards of eligibility, we know that they are legitimate organizations that

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use their funds as they say they do; therefore, I can designate to them with confidence.”

- Role Play:

Objection:

“I feel that I'm being pushed into giving. So much so, I'm not going to give at all!”

Reflect:

“I can appreciate that. Why do you feel you're being pressured?” (Listen to their explanation.)

Deflect:

“I agree there should be no pressure. In fact, the purpose of CFC is to provide us a service, a way for us to contribute to our charity or charities of choice through a convenient, once-a-year method at the office.”

### 20. CFC MYTHS

Some Federal employees decide not to participate because they believe certain procedures exist. The following are some of the more common myths regarding the CFC:

**My CFC contribution is distributed to selected charitable organizations as determined by a committee or individual.**

There is no discretionary money in CFC. Every dollar is distributed to the agencies, which the donor specifically designated for his or her gift. The annual CPA audit of the CFC traces contributions from pledge card to agency to ensure compliance.

**The CFC and the United Way campaign are one-in-the-same.**

The CFC is a federally run campaign that is limited exclusively to Federal employees. The Office of Personnel Management supervises the campaign. The LFCC (led by local Federal executives) governs the conduct of the campaign, and federal employee volunteers implement the campaign throughout the federal workplace. United Way is contracted by the LFCC of San Antonio to administer the campaign and has no influence on the distribution or control of any CFC funds.

**When giving through the CFC, my contribution supports every agency listed in the brochure.**

Contributions are distributed only to the agencies to which the donors designated to receive their gift. Undesignated funds (when a donor elects not to designate an agency) are distributed among the agencies proportionally to the amount designated for an agency. An agency that does not receive any designated contributions will not receive any undesignated contributions.

**A major portion of my contribution goes for administrative expenses.**

The cost to administer the San Antonio CFC is currently 8.4% of the total revenue raised. In other words, almost 92% of the contribution goes to the agency.

**A payroll deduction contribution continues forever.**

A CFC payroll deduction (allotment) is valid only for the upcoming calendar year. The withdrawal will terminate automatically on December 31<sup>st</sup>.

**I am being pressured to participate in the Combined Federal Campaign.**

By federal regulation, participation in the CFC is completely voluntary. There are safeguards built into the campaign to prevent coercion. These safeguards are published in the PREFACE of the brochure.

### 21. DONOR PRESSURE

Participation in the Combined Federal Campaign is strictly voluntary. Once CFC has been explained and the person says “no”, do not pressure them to participate. Rather, thank them and tell them that you will be available to assist should they change their mind. Give them a copy of the Charity List for possible future reference.

### 22. DONOR RECOGNITION

Acknowledging a donor’s generosity is an easy way of saying “thank you”. The following donor recognition program is exclusive to the San Antonio CFC:

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### **SILVER GIVING LEVEL**

Donor recognized for an annual gift of ONE HOUR PER MONTH

### **GOLD GIVING LEVEL**

Donor recognized for an annual gift of 1.5 HOURS PER MONTH

### **EAGLE GIVING LEVEL**

Donor recognized for an annual gift of 2.0 HOURS PER MONTH

## **23. ORGANIZATION AWARDS**

Recognizing an activity for its collective achievement builds teamwork. CFC has established a tangible way of saying “thank you” in the form of certificates. As soon as possible after close of the organization’s campaign period, CFC will deliver appropriate certificates to the Commander/Director/Boss for presentation.

There are four award levels:

- **Gold Award** – 100% or more of unit dollar goal
- **Silver Award** – attaining 90% of unit dollar goal
- **Bronze Award** – attaining 75% of unit dollar goal
- **Special Recognition Award** – surpassing previous year’s results while not achieving Bronze level award

## **24. PROJECT OFFICER RECOGNITION**

Project Officers are the foundation of success for the Combined Federal Campaign. They perform the key community service of orchestrating the campaign for their activity. Following the campaign, an *Appreciation for Outstanding Service Certificate* will be prepared and delivered by the Loaned Executive to the organization’s Commander/Director/Boss.

## **25. KEY WORKER RECOGNITION**

Key Workers are the individuals that carry the campaign to the donor. Their performance is a key element to the success of an activity’s campaign. The Loaned Executive will provide sufficient quantities

of *Appreciation for Outstanding Service Certificates* to the activity’s Project Officer for completion and presentation.

## **26. MATERIAL SUPPLY**

Distribution - Campaign materials will be distributed as materials become available, usually during August. The quantity of each item will be determined by the number of personnel reported by the activity population number that was submitted. In the absence of current personnel numbers, the most recent available numbers will be used for calculating distribution quantities.

Donor recognition items - Activities may wish to stock a quantity of donor recognition items so as to be able to deliver them to donors immediately. Arrangements may be made through the CFC office.

Support through the website - Some material can be downloaded from the CFC website at [www.cfcsanantonio.org](http://www.cfcsanantonio.org). The brochure is posted on this site.

Return of materials - Campaign DVD, banners, unused pledge cards, progress report forms, envelopes and donor recognition items should be returned to the CFC office. Other paper products should be recycled, or may be returned to the CFC office for recycle.

## **27. ADMINISTRATIVE PROCEDURES**

**Fundamental to the character of the Combined Federal Campaign is the trust held by the donor. The handling of an individual’s pledge and money demands the highest degree of integrity, accuracy and confidentiality.**

The following materials and procedures have been designed so as to sustain the high level of confidence in CFC currently held by donors.

Cash - Cash should be included with the appropriate Bundle Report Form.

Personal Checks - Personal checks are to be made payable to “Combined Federal Campaign”. Checks made out to specific charitable agencies cannot be deposited and will be returned.

## San Antonio Combined Federal Campaign

### BUNDLE REPORT FORM #4 (3 part)

[Project Officer Use]

The Bundle Report form is used to account for all contributions that are batched together for submission.

Bundle reports are sequentially numbered and submitted as required.

Each report should include not more than 100 pledge cards and should list the name and telephone number of the person submitting the report.

Reports should be hand carried to the CFC Cashiers Cage / Audit Point, 700 South Alamo, San Antonio TX 78205.

More than one report may be submitted at the same time, however, each report is to be individually identified and numbered to ensure continuity.

Once an activity has completed its campaign and a final report is submitted, additional reports are not required. The exception is if additional donations are received. In this case, complete another report form, number it sequentially, and mark the "Final Report" box.

**Reminder:** No further reports are required following the submission of a final report, unless additional contributions are received.

### **28. TRAINING**

Essential to success in the CFC is the education of donors. The key to an effective CFC is the training of Project Officers and Key Workers. Enclosure (5) contains a training outline.

- Project Officer training will be scheduled early. CFC staff will conduct the training at the PCFO office.
- Key Worker training - Normally the Loaned Executive and the Project Officer conduct the Key Worker training.

### **29. STAFF COMMUNICATIONS**

**San Antonio CFC  
700 South Alamo  
San Antonio, TX 78205**

**Campaign Manager: Jerry Swinarsky  
Office Phone: (210) 352-7023**

Office Fax: (210) 298-9104

Office E-mail: [jswinarsky@unitedwaysatx.org](mailto:jswinarsky@unitedwaysatx.org)

Websites: [www.cfcsanantonio.org](http://www.cfcsanantonio.org)  
[www.opm.gov/cfc](http://www.opm.gov/cfc)

**ENCLOSURES**

# San Antonio Area Combined Federal Campaign

# San Antonio Area Combined Federal Campaign

## GLOSSARY

**Administrative Costs** - The revenue that a charitable agency spends on administration and fund-raising activities.

**Agency** - A human health and welfare charitable organization that provides services to Federal employees and their families.

**Audit Point** - The facility where all pledge forms and progress reports are audited, designations recorded and contributions are distributed to agencies. The location is 700 South Alamo, San Antonio TX 78205.

**Charity List** - A booklet listing of all charitable federations and agencies, including a 25-word statement describing the organization's programs and services. This is the single source for selection of agencies that a donor may use to contribute through the San Antonio CFC. No other CFC's brochure may be used.

**Designated Funds** - When a donor selects a specific agency or federation to receive his or her contribution. Designations are made on the 2011 pledge card.

**Donor Recognition** - As an expression of appreciation for one's contribution, specific items are offered to a donor.

**Federation** - A single organization with member charitable agencies established for the purpose of supplying common fundraising, administrative and management services to its members.

**International Agency or Federation** - A charitable organization that provides services in foreign countries.

**Key Worker** - An individual selected from within an activity tasked to contact members of the activity for the purpose of participating in the CFC, normally one key worker for every 35-50 personnel.

**Loaned Executive** - Selected nominated Federal employees who augment the CFC staff during the campaign period. They assist Project Officers in developing and conducting their campaign.

**Local Agency or Federation** - A charitable organization that provides services within the San Antonio area or the state of Texas.

**Local Federal Coordinating Committee (LFCC)** - A select group of local Federal employees tasked to conduct and manage the CFC within San Antonio. The LFCC establishes the local policies and procedures for the conduct of the campaign.

**National / International Agency or Federation** - A charitable organization that provides services in the U.S. Some federation member agencies may provide services in a foreign country.

**OPM** - The Office of Personnel Management is the Federal government organization that oversees the conduct of the CFC. It publishes congressionally approved regulations that establish the policy and procedures common to all CFCs.

**Organization** - A Federal office, agency or facility; a military unit, organization or facility; a post office or station or postal service office or department that has its own account number.

**Principal Combined Fund Organization (PCFO)** - A private, not-for-profit agency, contracted annually by the LFCC to administer the campaign. United Way of San Antonio and Bexar County is the PCFO for the 2011 San Antonio campaign.

**Project Officer** - An individual selected from within an organization tasked to coordinate and conduct the Combined Federal Campaign on behalf of his/her organization.

**Unaffiliated Agency** - A charitable organization, local, national or international, that is not a member of a federation.

**Undesignated Funds** - Donations not specifically designated to an agency or federation. Undesignated funds are distributed among all agencies listed in the Charity List, proportionate to the agency's designations received.

## San Antonio Area Combined Federal Campaign

### INSTRUCTIONS FOR COMPLETION OF THE

## FALL 2011 COMBINED FEDERAL CAMPAIGN CAMPAIGN PLAN

The Campaign Plan is the document that serves as a planning guide and helps in the coordination effort. It brings together all the resources available to help you conduct a very successful campaign. The senior executive at the organization, the commander, the postmaster, the director, etc., should approve the Campaign Plan. The plan is the organization senior executive's plan.

These instructions have been formatted to the campaign plan. The numbers in parentheses at the end of lines in the plan correspond to the instructions below. If you have any questions, please call your Loaned Executive or the San Antonio CFC at (210) 352-7023.

### **Instructions**

All entries should be legibly handwritten in pen.

- (1) Enter the full name of the Organization.
- (2) Enter the account number assigned to your activity by CFC.
- (3) Enter the name of the individual preparing the plan. This should be the Project Officer.
- (4) This line requires the signature of the senior executive of the organization. This shows that the senior executive has reviewed and approved the plan for the conduct of the CFC and understands the organization's goal.
- (5) If applicable, enter the monetary goal assigned to your activity by the LFCC. This can be found in a letter sent to the organization's senior executive.
- (6) Enter a percentage for participation that you hope to reach as an activity. Start this process by reviewing past participation rates for your activity. An increase in participation is a sure way of increasing total contributions. However, avoid making participation the goal. Setting a participation rate of 100% as the goal is not permissible. The trap here is, everyone participates with a minimal gift, resulting in an overall drop in the sum of donations. Giving an effective presentation to **everyone** in the activity and following up with those who missed the presentation(s) or were undecided are ways to improve the participation rate.
- (7) Enter the dates during which you will conduct the campaign in your activity. The 2011 CFC will run from 1 September until 15 December. You should look for as short a period as possible within the campaign window during which you can effectively conduct your activity's campaign. You should coordinate with the scheduler of workloads, operations, training, exercises, or special events. The purpose for this coordination is, to avoid conflicts that will adversely impact the campaign, as well as, identify opportunities that you may want to exploit to enhance the campaign. This coordination will help minimize the impact the campaign will have on the workflow. It also provides the senior executive an opportunity to weigh in on the scheduling of his or her activities so that they may have an active role in the campaign. The selection of the dates should also help in ensuring that all the necessary logistical support is available.

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- (8) If your activity is going to have a kick-off event, enter when and where. This will alert your activity's senior executive so that he or she can plan their time appropriately. It will also alert your Loaned Executive, who may be able to offer assistance.
- (9) Enter the planned attendees at the kick-off event. This will show the senior executive the scope of the event and allow for encouragement of mid-level leaders to support the event.
- (10) Check the appropriate boxes to indicate the support you have arranged for your kick-off event.
- (11) Enter the dates on which you will conduct training for the Key Workers. This will allow the senior executive to plan his or her involvement. Additionally, enter the name of the person who will introduce the training. Your activity's senior executive should seriously consider his or her role in this. Their involvement sets the tone for the campaign and sends a strong message on the importance of the CFC.
- (12) Enter the date on which you will start the pre-campaign publicity. Work with your Loaned Executive on this. There may be ways to dovetail with the plans of other activities to help compliment each other's efforts and improve results. Check all of the means that you will utilize during the campaign.
- (13) Check the method you will use to contact the members of your organization. The group presentation is an effective way to reach large numbers at one time. For smaller activities, the one-on-one presentation may be more effective. For some it may be a combination of both.
- (14) Check to indicate that you understand that each member who agrees to contribute should complete a pledge card.
- (15) Check whether or not your organization will have a fundraising event. Fundraising events for the CFC are permitted by Federal Regulations; however, they require the approval of the organization's senior executive. If your organization plans a fundraising event, fill in the date and the type of event. Keep in mind that fundraising events are designed to augment your campaign, not replace it. For this reason you should hold your fundraising events after you have solicited contributions from the members. If you have the fundraising event beforehand, the risk is that the members feel they contributed at the fund-raiser; and, therefore, there is no need for them to make a personal contribution using the pledge card.
- (16) Recognition is an important element to a successful campaign. Most contributors want to be appreciated for the donations that they make. Give thought as to how you will execute this critical aspect of your activity's campaign and fill in the requested information.
- (17) Use this section as a checklist to ensure that you have all the material necessary for you to conduct the campaign in your activity.
- (18) Enter the name of your Loaned Executive. This is your primary point of contact on CFC matters during the campaign. The Loaned Executive is there to facilitate your campaign efforts.

# San Antonio Area Combined Federal Campaign

## FALL 2011 COMBINED FEDERAL CAMPAIGN CAMPAIGN PLAN

**Organization:** \_\_\_\_\_ (1) **CFC ID#** \_\_\_\_\_ (2)

**Prepared by:** \_\_\_\_\_ (3)  
(Project Officer)

**Approved by:** \_\_\_\_\_ (4)  
(Organization Commander/Director)

**GENERAL:** The Fall 2011 San Antonio Combined Federal Campaign will commence 1 September. By Executive Order, the President listed, among the objectives of the CFC, the lessening of the burden on government and local communities in meeting the needs of human health and welfare. Implied is a mission to raise as much money as possible, as efficiently as possible, for charitable purposes. The Office of Personnel Management (OPM) is tasked to oversee the CFC program. The Local Federal Coordinating Committee (LFCC), comprised of the most senior leadership in the Federal community in San Antonio, conducts the campaign in San Antonio for OPM.

The LFCC has established a goal for each activity.

### GOAL:

- Our Organization's goal is to raise \$\_\_\_\_\_. (5) *(If applicable.)*
- We will endeavor to achieve a \_\_\_\_\_% participation rate. (6)

### CONDUCT OF THE CAMPAIGN:

- We plan to conduct our campaign from \_\_\_\_\_ to \_\_\_\_\_. (7)
- We plan to have a Kick-off Event on \_\_\_\_\_ at \_\_\_\_\_(location). (8)
  - Planned attendance will consist of \_\_\_\_\_. (9)
  - We plan to have a speaker at the event: (10)
    - an Agency Speaker *(arranged through your Loaned Executive)*
    - an activity member giving a testimonial
    - a senior executive from outside your activity
    - other \_\_\_\_\_.
- We plan to conduct training for Key Workers on \_\_\_\_\_. (11)
  - We plan to have \_\_\_\_\_ *(senior executive)* introduce the training.
  - We plan to have \_\_\_\_\_ *(Loaned Executive (LE)/ Other)* assist in the training.
- We plan to commence pre-campaign publicity \_\_\_\_\_(date). (12)
  - We plan to utilize campaign posters *(Supplied with campaign material)*
  - We plan to utilize local media.
  - We plan to utilize a campaign thermometer *(available from LE)*
  - We plan to utilize activity newsletter / other \_\_\_\_\_.

## San Antonio Combined Federal Campaign

- We plan to contact each member of our activity via: (13)
  - A group presentation.
  - Direct personal contact by a Key Worker or the Project Officer.
- Each member of the activity who wishes to contribute will turn in a pledge card (WHITE SCAN COPY) that will be forwarded to the CFC Audit Point. The SCAN COPY of all pledge cards will be turned in to the CFC Audit Point as part of each Bundle Report. (14)
- Fundraising Event: (15)
  - We plan to hold a “CFC Fundraising Event” on \_\_\_\_\_ (date). The type of event will be \_\_\_\_\_  
(This event should occur *after* each member has been given his or her Brochure and Pledge Card)
  - We do not plan to hold a CFC Fundraising Event.

### **RECOGNITION:** (Recognition of donors is an important element to a successful campaign) (16)

- How, when and who will present these items to donors?

- 
- Key worker Appreciation for Outstanding Service Certificates: How will they be presented?

---

*(Certificates may be obtained from the CFC office following your campaign)*

### **CAMPAIGN MATERIAL AND SUPPORT:** (17)

- Arrangements have been made to obtain campaign materials. (listed below)  
(Quantity of each item is based on reported number of personnel assigned to activity -- additional supplies will be available from your Loaned Executive, Group Coordinator or from the CFC office.)
  - Campaign Handbooks
  - 2011 Charity Lists
  - 2011 Pledge Cards
  - CFC Posters
  - Campaign DVD
  - Bundle Report Forms
- Our Loaned Executive is: \_\_\_\_\_ (18)

### **REPORTS:**

- The CFC office will provide “final audited results” of your campaign upon request.

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### SAMPLE CFC ENDORSEMENT BY SENIOR EXECUTIVE

*[modify underlined words appropriately]*

From: [Commander/Commanding Officer/Organization Head/Senior Executive]

To: [All Personnel]

Subj: 2011 COMBINED FEDERAL CAMPAIGN (CFC)

The Combined Federal Campaign for [ACTIVITY NAME] will commence on [DATE]. The CFC is the once-a-year opportunity offered to us as Federal employees to support a wide variety of human health and welfare charitable agencies. It is a service provided to us in our workplace. It is our chance to make an impact on our own world. It is like making an investment in our future. None of us is immune from the variety of challenges that CFC agencies are working to solve every day.

Our goal this year is to raise [\$AMOUNT]. (If applicable.)

After reviewing the list of agencies in the Charity List, I am confident you will find several organizations that dedicate their services in support of an ailment, a condition, or a cause that has directly affected you or a member of your family. Without exception, each of us has had our lives influenced by some CFC agency.

As part of the service provided by CFC, we can make our charitable contributions through payroll deduction. This is the easy and most efficient way to make a donation. A modest amount withheld each pay period adds up to a very meaningful gift over the year. I urge you to consider making your contribution through payroll deduction.

The CFC is a very efficient service. Last year, the San Antonio CFC raised \$5.5. The entire cost of printing campaign material, providing donor recognition items and distributing all contributions raised was 8.4%.

Last year, [ACTIVITY NAME] raised [\$AMOUNT] [and we were recognized for our collective effort by achieving the [AWARD NAME] award]. To reach this year's goal will require a team effort and all of us must pull together. I am confident that we will reach our goal. I am also confident that the better we do the more winners we will have. And the winners are all those people whose lives just improved because we cared to get involved.

I ask for your consideration and support by participating.

*Supporting a Caring Community*

Thank you,

## San Antonio Area Combined Federal Campaign

### SUGGESTED REMARKS IN SUPPORT OF THE CFC

*[modify underlined words appropriately]*

"Today, we have an opportunity to make tomorrow better. Each year in the Fall, the Combined Federal Campaign comes to our workplace and gives us a chance to make an investment in ourselves, our family and our community.

The Combined Federal Campaign is not a charity looking for money, rather it's a *service* offered to us to meet our charitable giving needs, without leaving our job. The CFC is exclusively for Federal employees and members of the U.S. Postal Service, and brings with it the ease of using payroll deduction for making our charitable donations. Except for [~~the Air Force/Army/Navy/Marine Corps Relief drive and~~] any emergency disaster appeals, the CFC is the only fund-raising effort held here at work.

The CFC is efficient because a major portion of the manpower effort to conduct the campaign is done by volunteer Federal employees. It is efficient for the participating agencies since the administrative costs of the agency are reduced. For example: if an agency spends \$100 dollars to raise \$1,000, its administrative cost is 10%. (It costs the agency nothing to participate in the CFC.) If the agency raises \$200 dollars through CFC donations, it has now raised \$1,200, but still has only spent \$100. The net result is that the agency's administrative cost is now 8.3%. The San Antonio CFC is efficient in itself, as evidenced by its low 8.4% administrative cost in 2010.

The Combined Federal Campaign is dependable. A committee of Federal employees screened each agency listed in your brochure. Every agency has demonstrated that it provides the programs that it advertises.

A question many of us have is, "how much should I give?" The exact amount is a matter of our own conscience and resources. It is suggested that we consider contributing one hours pay, per month. Last year's average gift in the San Antonio CFC was \$274.

Our goal this year is to raise [\$AMOUNT]. (If applicable.)

In 2011 our [office - command - unit - post office - division] raised [~~\$--amount~~] [and were recognized for our collective effort by achieving the (award)]. I feel we can reach or exceed our goal. We are going to work as a team and accomplish it, just like we do everything else. I believe that the better we do the more winners we will have. And the winners are all those folks whose lives just improved because we cared to get involved.

Remember, your participation in the CFC is voluntary. Remember also, you are not "giving to CFC", rather, you are "giving through CFC", you are taking advantage of a service that brings charitable giving to our workplace.

Thank you."

# San Antonio Area Combined Federal Campaign

## CFC TRAINING OUTLINE - 2011

### CFC DEFINED

- A SERVICE -- ONCE-A-YEAR -- IN-THE-WORKPLACE -- CHARITABLE DRIVE
- FOR ALL MILITARY, FEDERAL AND U.S. POSTAL EMPLOYEES
- ESTABLISHED 1961 AT REQUEST OF FEDERAL EMPLOYEES TO:
  - ELIMINATE CONSTANT SOLICITATION AT WORK BY CHARITABLE AGENCIES
  - ALLOW USE OF PAYROLL DEDUCTIONS FOR CONTRIBUTIONS
  - LESSEN THE BURDENS ON GOVERNMENTS FOR HEALTH AND WELFARE SERVICES

### CAMPAIGN OBJECTIVES

- ACHIEVE GOAL (If applicable)
- 100% INFORMED ..... EVERYONE IS TOLD THE STORY OF CFC
- 100% OPPORTUNITY ..... EVERYONE IS CONTACTED AND GIVEN THE OPPORTUNITY TO PARTICIPATE

### CAMPAIGN PLANNING

- COMPLETE CAMPAIGN PLAN..... GUIDE ENCL (2)
- SENIOR EXECUTIVE’S ENDORSEMENT LETTER TO “ALL EMPLOYEES” ..... GUIDE ENCL (3)
- USE OF NEWSLETTER NOTES ..... GUIDE ENCL (6)
- DVD (SHOW ON CCTV, AT PRESENTATIONS) ..... EACH LOANED EXECUTIVE HAS A COPY
- GUIDE (COORDINATOR REVIEW) ..... COPY TO EACH ACTIVITY

### GROUP PRESENTATION

- MOST EFFICIENT WAY TO EDUCATE INDIVIDUALS ..... GUIDE PAGE 8
- EASIEST WAY TO CONTACT MANY FOLKS IN A SHORT PERIOD OF TIME
- OPPORTUNITY FOR SENIOR EXECUTIVE TO ENDORSE CFC ..... GUIDE ENCL (3)
- CHANCE TO HAVE A GUEST SPEAKER EXPLAIN HOW DONATIONS ARE USED
- CONVENIENT WAY TO SHOW THE CAMPAIGN VIDEO
- MOST COMFORTABLE FORMAT FOR CONTRIBUTORS

### ONE-ON-ONE CONTACT

- PERSONAL “FACE-TO-FACE” OPPORTUNITY TO EXPLAIN BENEFITS AND ADVANTAGES OF THE CFC
- FOLLOW-UP WITH THOSE MISSED IN GROUP PRESENTATIONS
- HANDLING OBJECTIONS ..... GUIDE PAGE 10

### CHARITY LIST

### PLEDGE CARD

- PRINT USING ALL CAPITAL LETTERS / USE BALLPOINT PEN
- DONOR INFORMATION ..... REQUIRED INFORMATION NEEDED TO CONTACT IF QUESTIONS
- CONTRIBUTION:
  - PAYROLL DEDUCTION ..... ENTER AMOUNT PER PAY PERIOD THEN COMPUTE ANNUAL AMOUNT
  - CASH OR CHECK ..... MAKE CHECKS PAYABLE TO “CFC
- DESIGNATIONS ..... USE ONLY 2011 SAN ANTONIO CHARITY LIST
- DONOR RELEASE INFORMATION ..... CHECK THE BOX THAT APPLIES
- DONOR RECOGNITION ..... CHECK ONE OF THE BOXES IF APPLICABLE
- PAYROLL DEDUCTION AUTHORIZATION ..... SIGNATURE / DATE  
..... SSN REQUIRED IN DONOR INFORMATION SECTION (NOT REQUIRED FOR CASH)

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- CONFIDENTIAL GIFTS ..... SEALED ENVELOPE / ALL BUT PINK COPY OF PLEDGE CARDS

### DONOR RECOGNITION

- SILVER GIVING LEVEL (1.0 HOURS PER MONTH)
- GOLD GIVING LEVEL (1.5 HOURS PER MONTH)
- EAGLE GIVING LEVEL (2.0 HOURS PER MONTH)

### ACTIVITY RECOGNITION

AWARD LEVEL BASED ON PERCENT OF GOAL OBTAINED

- GOLD AWARD: 100% OR MORE OF UNIT DOLLAR GOAL
- SILVER AWARD: 90% to 99.9% OF UNIT DOLLAR GOAL
- BRONZE AWARD: 75% to 89.9% OF UNIT DOLLAR GOAL
- SPECIAL RECOGNITION AWARD: SURPASSING PREVIOUS YEAR'S RESULT

### ADMINISTRATION-CAMPAIGN MATERIAL

- CHARITY LIST .....COPY AVAILABLE TO EVERY PERSON
- PLEDGE CARD ..... 1 COPY PER PERSON
  - WHITE SCAN COPY TO COORDINATOR OR KEY WORKER ..... (DELIVERED TO CFC AUDIT POINT)
  - YELLOW COPY TO PAYROLL / DISBURSING.....(PROJECT OFFICER DELIVERS)
  - PINK COPY TO CONTRIBUTOR ..... (RETAINED BY DONOR FOR RECORD)
- BUNDLE REPORT FORM #4.....PROJECT OFFICER SUBMITS TO CFC AUDIT POINT
- CFC INCENTIVES AVAILABLE THROUGH LOANED EXECUTIVE OR CFC OFFICE

### QUESTIONS

## **San Antonio Area Combined Federal Campaign**

### **SAMPLE BULLETINS /NEWSLETTER CLIPS / NOTES - 2011**

#### **WHAT IS THE CFC?**

The Combined Federal Campaign is a service that offers to each Federal employee a once a year, in-the-workplace opportunity to contribute to human health and welfare charitable agencies. The CFC was created because many military personnel, Federal and postal employees wanted to halt the continual solicitation by charitable agencies at the work site. The objective was to provide an effective, convenient and efficient once-a-year campaign that would serve the charitable needs of all Federal employees. The use of payroll deduction was authorized as an easy way to make charitable contributions.

#### **WHO IS THE CFC?**

The Combined Federal Campaign is exclusively for military personnel, Federal and postal employees. Federal employees conduct the CFC for Federal employees.

#### **WHAT IS CFC MONEY USED FOR?**

The money, which is contributed through the Combined Federal Campaign, is distributed to the charitable agencies that the donors designated to receive their contributions. Should a donor elect not to designate their gift to a specific agency then it will be shared among all agencies listed in the brochure, proportionally to the amount of money that they received in designations.

#### **CFC: CHOICE - CONVENIENCE - CONFIDENCE**

- Select from over 2,400 charitable agencies
- Use payroll deduction
- Every agency is screened by federal employees

#### **CFC -- ONE PERSON CAN CHANGE A WORLD!**

When one of our fellow co-workers identifies himself or herself to you as your Key Worker, please listen and consider carefully this opportunity to help. Everyday people are dying of crippling diseases, families are being shattered by unforeseen illnesses, and many are facing despair and seemingly hopeless living conditions. Some are old and lonely. Some are disabled for life. Some just don't know where to turn for help. We can help change their world. We can give through the CFC in support of those human health and welfare agencies that fight these problems. CFC -- Our opportunity to help change a world.

#### **CFC -- GET INVOLVED!**

Some people are indifferent to human suffering until it involves them personally. The fact is that none of us is immune from fatal or crippling diseases, family crisis, disabling accidents, loss of homes by fire, emotional distress, loss of income, criminal violence, a clean drink of water. Thankfully, there are safety nets within our communities that can help. Listed in your CFC brochure are charitable agencies that can meet the demand for assistance. They support the complete cross section of need throughout San Antonio, across America, and around the world. When asked, get involved and make a contribution to the agency of your choice.

#### **CFC -- JOIN THE TEAM THAT CHANGES A WORLD!**

Have you ever stopped to think how many of us would be maimed, diseased, disabled, or even dead if it were not for the breakthroughs achieved by medical research just since you were born? Every one of us is affected by at least one of the organizations listed in your CFC brochure. When asked by your Key Worker to participate, join the team that makes a difference. Change tomorrow today - contribute through the CFC.

#### **CFC -- HELP THE YOUNG - HELP THE OLD - HELP YOURSELF**

Albert Schweitzer wrote, *"You don't live in a world all alone. Your brothers are here too."* Today, our brothers, sisters, fathers and mothers, family, and friends could use our help. The Combined Federal Campaign is a service for us, that gives us the opportunity to support human health and welfare charitable agencies that are fighting mental illness, emotional anguish, cancer, starvation, human despair, heart disease, environmental destruction, our civil rights and a host of other challenges. When your Key Worker asks you to participate in the 2011 CFC, consider payroll deduction. A small amount from each paycheck adds up to a big difference.

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### **A CONTRIBUTION TO CFC -- A POWERFUL GIFT!**

Giving up *one candy bar a week* is like contributing \$36 a year to help provide a multitude of services to the military dependent, the letter carrier for the postal service, the Border Patrol agent guarding our border, or the veteran overcoming the effects of Agent Orange. So little goes so far - make a difference in someone's world - give through your CFC.

### **YOUR CFC PLEDGE CARD IS A CONTRACT**

Your pledge card is a "contract" between you and the Government. When you designate to one or more of the agencies in the Charity List, the agency(ies) you select will receive your donation. Your entire gift goes direct to the agency(ies), except for about 8.4% CFC administrative expense. Each pledge is audited, each pledge is tracked throughout 2011, and each pledge is accounted for by a CPA audit. CFC works, it's efficient, it's convenient and it's reliable.

### **CFC -- WHERE DOES MY GIFT GO?**

Your gift goes where you want it to go - to the agency or agencies of your choice. In the Charity List, more than 2,400 separate charitable agencies are listed. Each has met stringent eligibility criteria and public accountability standards. A committee of Federal employees has screened each agency to ensure that the agency does what it says it does, and that it spends its money as advertised. Remember, there are no limits, no "caps", no specified amount that an organization can or will receive. Each will get all funds that you designate to them.

### **CFC -- HOW MUCH SHOULD I CONTRIBUTE?**

This is a matter of each person's own conscience and resources. It is suggested that we consider donating 15 minutes pay, per week. For ease of calculating, take your annual salary and multiply it by .006 and dividing by four. Because we can give through payroll deduction, we are able to have a modest amount withheld each payday that adds up to a very meaningful gift over a year.

For instance, by donating the equivalent of:

- One candy bar a week - you make an annual gift of \$36.
- One soft drink and chips a week - you make an annual gift of \$72.
- Driving 17 less miles a week - you make an annual gift of \$84.
- One movie a month - you make an annual gift of \$96.
- One donut and a cup of coffee a week - you make an annual gift of \$120.
- One hamburger and fries a week - you make an annual gift of \$216.

### **CFC -- AN OPPORTUNITY TO HELP!**

CFC is not a charitable agency. It is a service provided to all Federal employees to help them meet their charitable objectives through a convenient, efficient and reliable way of contributing. There are no discretionary funds—every dollar contributed is distributed to the agency or agencies designated by the individual. If someone elects not to designate his or her gift, the money is distributed to all agencies in the CFC, proportionally to the amount that they had designated to them.

### **CFC -- CAN MY CONTRIBUTION REALLY MAKE A DIFFERENCE?**

YES... Your annual contribution of:

- \$500...can provide food, clothing and shelter for 3 people left without money or belongings following a disaster such as fire, flood or earthquake.
- \$450...can pay for the drilling of a clean water well for 3 villages, preventing devastating waterborne diseases.
- \$400...can fund an annual membership to a boys and girls club for 40 underprivileged children.
- \$300...can provide 36 blankets to children in a refugee camp.
- \$200...can buy schoolbooks and supplies for 8 poor children for one year.
- \$150...can provide 2 hours of speech therapy services for a child unable to speak properly, or cover the cost of diagnostic lab cultures for 4 children.
- \$125...can make possible 2 nights of shelter and food for a battered woman and child, in addition to counseling and legal referral for the mother; or provide two months transportation to kidney dialysis treatment.

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- \$100...can immunize 20 children against measles, tetanus, whooping cough, tuberculosis, diphtheria and polio.
- \$50...can make an important contribution to research that could help find the cure to many diseases.

### **CFC -- WHY SHOULD I GIVE?**

- Because it is convenient: in the workplace - once-a-year - payroll deduction!
- Because it is reliable: each agency is screened - every pledge is audited - every distribution is audited!
- Because it is efficient: administrative cost is 8.4% of amount raised!
- Because it reduces agency administrative costs: to be in the CFC costs the agency \$0 - the agency spends \$0 to market itself to Federal employees of San Antonio.
- Because it is an investment in your own future: past contributions have resulted in a longer life span - we have cleaner air and water - we have made major medical breakthroughs - we enjoy more freedoms!

### **QUESTION - Why are CFC contributions through payroll deduction the easiest way to contribute?**

**ANSWER** - A modest routine paycheck deduction adds up to a meaningful total gift.

### **QUESTION - Can I make a confidential CFC gift?**

**ANSWER**- Yes. After completing your pledge card, remove the pink copy for your records. Place all other copies into a plain envelope seal it and write on the front, "Confidential CFC Gift". Give the envelope to your Key Worker. The envelope will be forwarded *unopened* to the CFC Audit Point where your gift will be recorded and the amount credited to your organization by an auditor.

### **QUESTION - How much does it cost to run the CFC campaign?**

**ANSWER** - Last year, your San Antonio CFC raised more than 5.5 million dollars. The cost of running the entire campaign was 8.4% of that amount. The remaining 92% went directly to the agencies designated by the donors. Each year an independent CPA firm audits your CFC to ensure that all funds are properly distributed, to the penny.

### **QUESTION - When does my CFC payroll deduction start and end?**

**ANSWER** - Payroll deductions will commence 1 January 2012 and will continue through 31 December 2012. Your CFC allotment automatically terminates at the conclusion of the calendar year.

### **QUESTION - Who oversees the management of the San Antonio CFC?**

**ANSWER** - The CFC is conducted in accordance with congressionally approved regulations published by the Office of Personnel Management. These regulations stipulate that within every community, a Local Federal Coordinating Committee (LFCC) will be formed to conduct a campaign. The LFCC is composed of local federal, military and postal officials. The policies and procedures for the San Antonio CFC are established and enforced by the LFCC. General Edward Rice Jr., USAF, Commander, Air Education and Training Command, is the Chair of the LFCC.

### **QUESTION - Is my CFC contribution tax deductible?**

**ANSWER** - Yes, if you itemize your taxes. 100% of your contribution is tax deductible. Save the pink copy of your pledge card for record purposes. One-time annual contributions of \$250 or greater, require a verification letter from CFC to the donor as confirmation of the donation to the IRS should you be audited. A verification letter will automatically be sent to each applicable donor that authorizes release of their home address. Note: an annual donation in excess of \$250 made by payroll deduction is not affected.

### **QUESTION - What is United Way's role with San Antonio's CFC?**

**ANSWER** - United Way of San Antonio and Bexar County is the organization that has been selected by the Local Federal Coordinating Committee (LFCC) to administer the day to day operation of CFC on behalf of the Federal government. All policies and procedures of the campaign are directed by the LFCC. United Way is the fiscal agent for the campaign and as such, is responsible for the distribution of all campaign funds. It does not control distribution of funds or set campaign policy. As a non-profit organization, United Way receives funds through the CFC like any other non-profit organization.

## San Antonio Area Combined Federal Campaign

***QUESTION - Does United Way make a profit from the CFC for its services?***

**ANSWER** - No. United Way is the administrator of the campaign and the fiscal agent. As such, it receives payment for services rendered only; no fee is paid to United Way. United Way of San Antonio and Bexar County is one of over 2,400 charitable agencies participating in our CFC; therefore, it is eligible to receive designations from donors who wish to designate to them.

# San Antonio Area Combined Federal Campaign

## **GROUP PRESENTATION - 2011** **SEQUENCE OF EVENTS**

*(Approximately 30 minutes)*

### **Opening Remarks (Project Officer/Key Worker -- 2 min)**

- Welcome
- State purpose of gathering
- Introduce organization's senior executive

### **Remarks (Organization Senior Executive -- 5 min)**

- Expresses support for CFC
- Cite example(s) of how CFC agency programs have helped
- Relate any personal experiences
- Identify activity's goal
- Introduce next speaker

### **Remarks (Agency Speaker/Guest /Testimonial -- 10 min)**

- Agency speaker explains how dollars are used, cites examples, and thanks attendees for donations
- Guest voices support for CFC, cites example(s) of how CFC agency programs have helped, relates any personal experiences and thanks attendees for their support
- Testimonial by an individual (preferably from within activity) who has benefited from services of an agency

### **Remarks (Coordinator / Key Worker -- 3 min)**

- Explain ways to give, ease of payroll deduction, advantages of giving through CFC
- Explain Charity List and pledge card, procedures for participating, donor recognition
- Ask for questions

### **CFC Video (Activity Coordinator -- 5 min)**

- Introduce campaign video - it makes "the ask"

### **Closing Remarks (Activity Senior Executive --2 min)**

- Thanks guests
- Conveys appreciation to attendees
- Restates activity's objective

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### **Preparation Check List**

- Arrangements for meeting space (seating, AV equipment, direction signs)
- Advanced announcements of meeting are distributed (flyers, announcements)
- Attendance of senior executive confirmed
- Attendance of guest speaker(s) confirmed
- Campaign material ready for handout (brochures, pledge cards, calendars)
- Video and equipment checked and queued (lighting, audio & video adjustments)

*Enclosure (7)*

## **San Antonio Combined Federal Campaign**

### **TOP TEN REASONS CFC WORKS FOR YOU!**

- 1) It's your campaign.
- 2) The CFC is like a department store for charities (over 2,400 to choose from).
- 3) It's guaranteed. Your representatives screen each charity for accountability.
- 4) It can be customized to reflect your own beliefs, values and humanitarian concerns.
- 5) It's a cost effective way to donate.
- 6) A small monthly contribution adds up to a big annual gift.
- 7) Through the CFC you can fund many needs.
- 8) You determine where your money goes by designating your gift.
- 9) It offers easy, convenient one-stop shopping.
- 10) You can say, "I gave at the office" with pride.