

**SAN ANTONIO AREA
COMBINED FEDERAL CAMPAIGN
2016
PROJECT OFFICER TRAINING**



AGENDA



- **What is the CFC?**
- **2015 Campaign Results**
- **2016 Key Focus**

Federation Presentations

- **Project Officers**
 - Role & Campaign Tools/Resources

Speed Dating – LE/PO Perspectives – Pledge Processes

- **Wrap-Up**

CFC ORGANIZATION



| | |
|---------------------------------|--|
| OPM | Office of Personnel Management...oversees the program and writes the regulations |
| LFCC | Local Federal Coordinating Committee...group of local federal officials responsible for CFC in their community |
| PCFO | Principal Combined Fund Organization...local organization contracted to manage CFC In the community |
| Agency | Not-for-profit organization that provides human health and welfare and other services |
| Federation | Group of these voluntary not-for-profit agencies who have agreed to band together |
| Independent Organization | A not-for-profit agency that is on its own |
| Charity Brochure | Official list of charities available for designations in the local CFC |

CFC FEATURES



- Established in 1961 by President John F. Kennedy

CHOICE — *2,800 CHARITABLE AGENCIES*

173 LOCAL Agencies
@2,600 NATIONAL/INTERNATIONAL Agencies

CONVENIENCE — *USE PAYROLL DEDUCTION (PRD)*

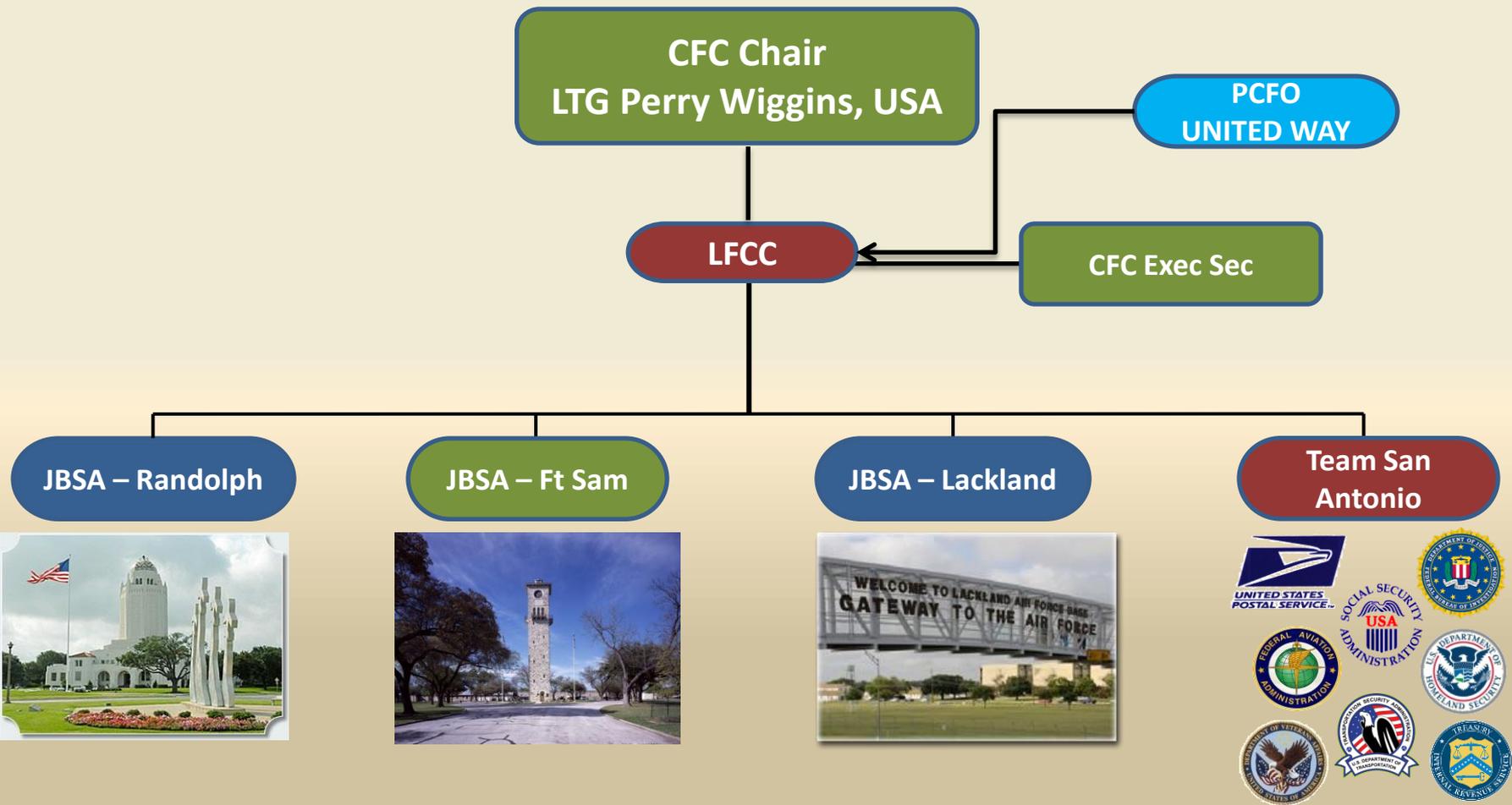
Once-a-year, In-the-workplace

CONFIDENCE — *EVERY AGENCY PRE-SCREENED FOR:*

Fiscal Soundness - Program Integrity
Low Administrative Cost – 9.2% (San Antonio 2015)

- CFC is a donor designation campaign... Donations are distributed ONLY to the charities the donor designates
- You select agencies that reflect your beliefs, values & concerns

SAN ANTONIO AREA CFC ORGANIZATIONAL STRUCTURE



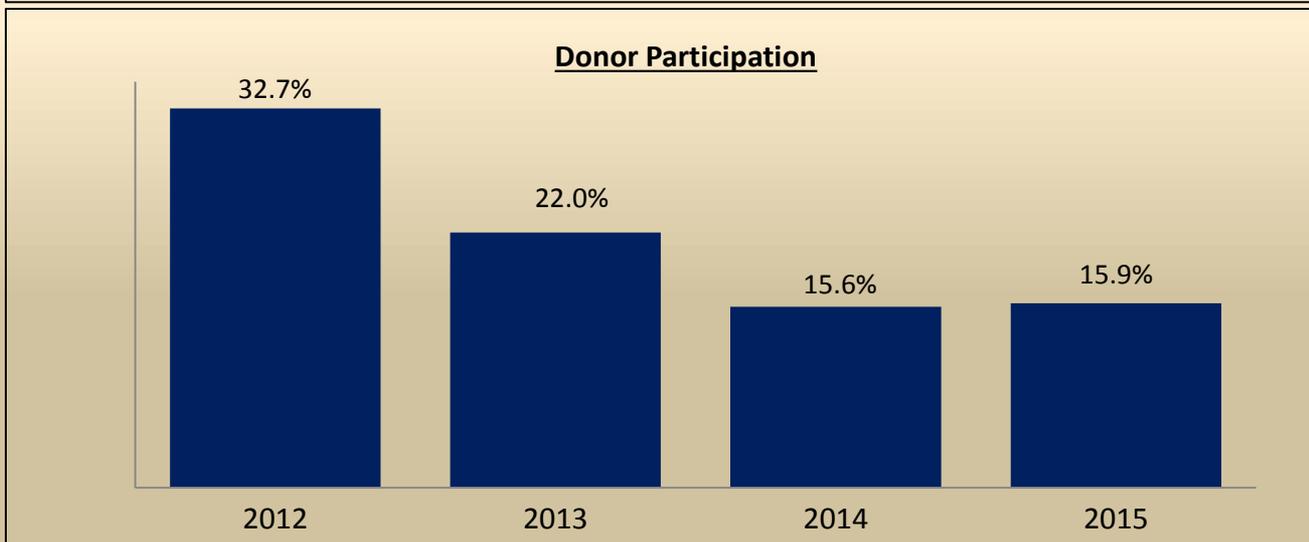
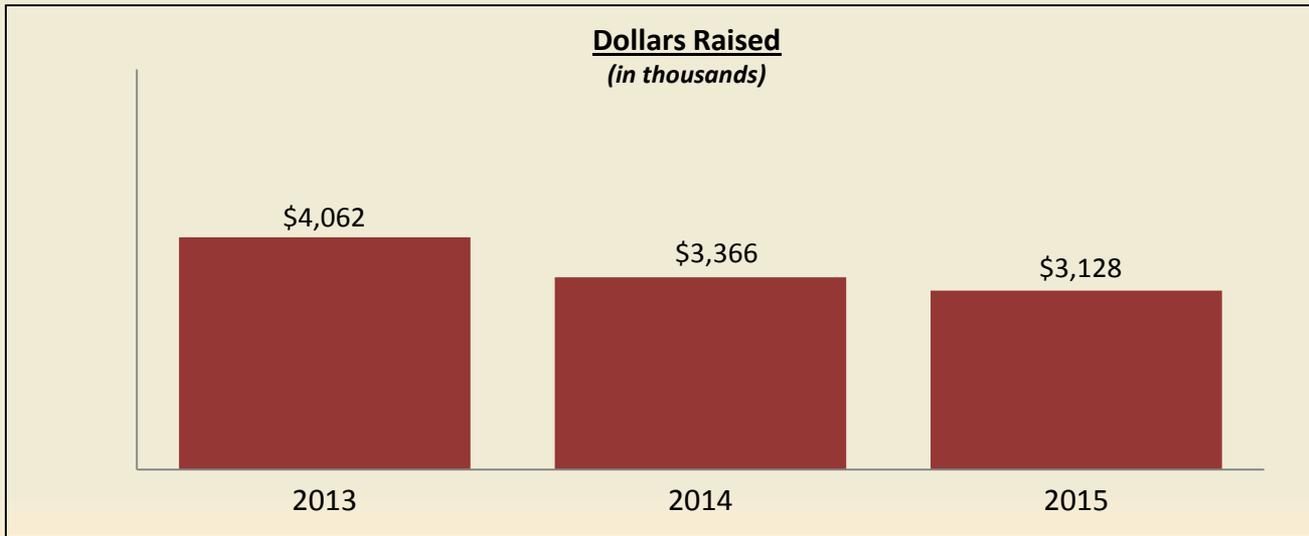
SAN ANTONIO AREA – CFC

2015 RESULTS



- San Antonio CFC:
 - 170 military/federal agencies – 65K+ employees
 - Ranked #1 out of 14 CFC campaigns in Texas
 - Ranked #9 out of 137 campaigns worldwide
 - Raised **\$3,128,268** for charitable agencies
 - The Average Gift was \$302

DOLLARS VS DONORS



FEDERAL EMPLOYEE PARTICIPATION IN CFC



2015 Total Number of Employees: 64,700

Employees Participating
10,342
Percent of Total **16%**

Employees Not Participating
54,358
Percent of Total **84%**

CFC Donor History (5 Year Trend)



2016 CFC KEY OBJECTIVE



- **Increase Participation**

- 54,358 non-contributors

A goal of meaningful contact should increase participation

- ❖ #1 reason people don't give ... not asked
- ❖ An informed employee generally gives
- ❖ Over 20k CFC approved agencies ... something for everyone

- Sequestration, manning cuts, etc will definitely challenge this year's campaign [again]
- 1-on-1 engagement is essential

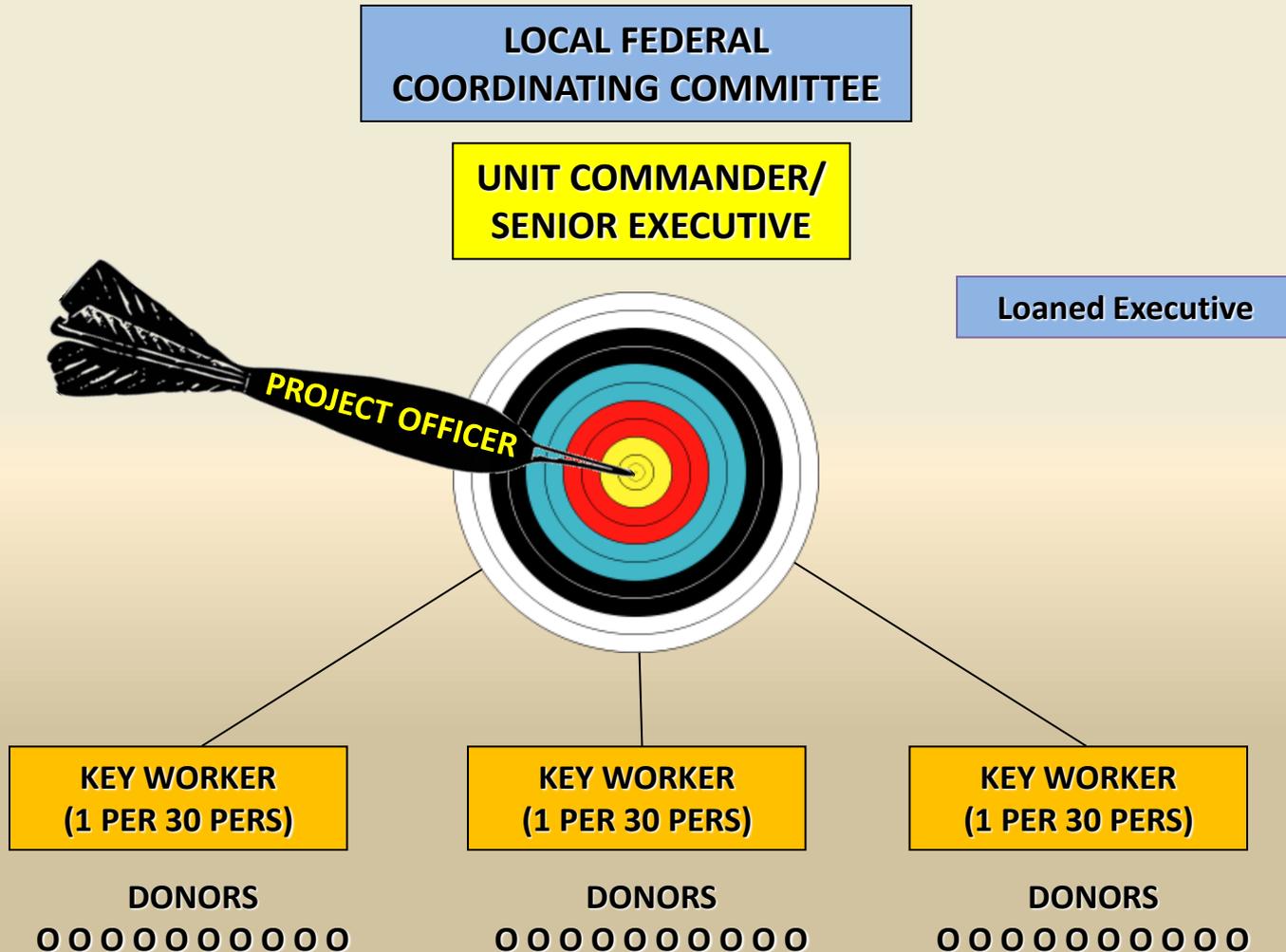
FEDERATION PRESENTATIONS

PROJECT OFFICER RESPONSIBILITIES



- Plan and implement a campaign designed to achieve or exceed your organization's goal
 - Coordinate & Report campaign progress to Commander/Director and CFC office
- Identify and train Key Workers to carry out the campaign plan
- Verify accuracy and completeness of pledge cards prior to turn in
- Work closely with Loaned Executive
- **YOU** are the Key to a successful campaign!!

UNIT LEVEL CAMPAIGN STRUCTURE



CAMPAIGN TOOLS/RESOURCES



- Website (www.cfcsanantonio.org)
 - Campaign Handbook
 - Reporting Instructions
 - Training Slides
 - Charity Brochure
 - Campaign Video
 - CFC Gift Calculator
- On-Line Pledge Options (myPay, EEX)
- Posters
 - Campaign Poster
 - Goal/Thermometer Poster
- **Loaned Executive**

CHANGING LIVES



Give through the CFC



2016 San Antonio Area
Combined Federal Campaign
www.cfcsanantonio.org

PLANNING



- Read the *Campaign Handbook* (the how-to source)
- If possible, contact 2015 Project Officer (challenges & successes)
- Get on you Commander/Senior Executive's calendar to meet!
***Unique opportunity for 1 on 1 to discuss goals, strategy, as well as to ensure leadership involvement and support*
- Determine unit campaign period (around operational schedule)
- Analyze unit campaign history (available from Loaned Executive)
- Develop a Plan (available in Campaign Handbook)
- Identify Key Workers (one for 30-50 employees) is ideal

PLANNING (CONT)



- **Meet with your Loaned Executive (LE)**
 - Can help w/ best practice campaign ideas, assist with Key Worker training, schedule agency speakers, etc..
 - Secure campaign materials (check for correct quantity)
 - Use posters (2 weeks prior / advertise campaign dates)
- Send e-mails, use newsletters, post events on shared calendars
- Schedule group presentations (Include Senior Executive and agency speakers)
- Consider a “Kick-off” event
- Consider “Fund-raising” events **(at end of campaign)**

GROUP PRESENTATION (AKA THE 'KICKOFF')



The most efficient way to tell the CFC story

- EASIEST WAY TO:
 - Set the campaign tone
 - Promote pledge options (pledge card/ on-line)
 - Have Senior Executive express support
 - Have agency speaker encourage participation
 - Answer questions donors may have

**Does not count towards contact numbers...

CAMPAIGN RECOGNITION

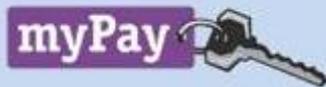


- Unit Awards
 - **Gold** – 100% of goal
 - **Silver** – 90.0% - 99.9% of goal
 - **Bronze** – 80.0% - 89.9% of goal
 - Special Recognition – less than 80% but exceeded 2015 amount
- Appreciation Certificates are available for Project Officers and Key Workers
- Donor Incentive Gifts – **discontinued** except for select military trainees (coins for max pledge of \$120/yr)

3 WAYS TO PLEDGE



DFAS myPay



Payroll Deduction

AD Mil, DOD-Civilians, VA and TRICARE

1. Use campaign ID number **0852** after logging onto system
2. Enter unit CFC account number in the field marked "command/unit name"

<https://mypay.dfas.mil>

Employee Express



Payroll Deduction

DOI, EEO, FAA, GSA, OPM, NCUA and SSA

1. Login and select 'Combined Federal Campaign' from the main menu
2. Follow the prompts to complete your payroll pledge

<https://www.employeeexpress.gov>

Triplicate Pledge Card



Cash/Check OR Payroll Deduction

Pledge cards are available through unit project officer... simply follow the directions and return to your key worker

if you need any assistance, FAQs are available at our website

www.cfcsanantonio.org

MYPAY



Pros

1. No associated Paperwork
2. Pledge is made directly with DFAS, so local finance coord is not needed
3. Can make pledge from anywhere (TDY, at home, on leave)
4. Designate up to 30 charities
5. Secure!

Cons

1. Any changes or cancellations need to be made through DFAS.
2. Module times out at @25 minutes
3. Donor input of unit account number (posted on CFC website)



Pledge On-Line through DFAS (myPay)

Payroll Deduction only

(AD Mil, DOD-Civilians, VA and DHA)



1. Go to www.cfcsanantonio.org
2. Click "Pledge myPay" (directs donor to the DFAS site <https://mypay.dfas.mil>)
3. Log on and select "Combined Federal Campaign" from main menu.
4. Enter Campaign ID number **0852**
5. Create your pledge.
6. Enter unit CFC account # _____ in the "Command/Unit name" field

For full instructions, go to www.cfcsanantonio.org (click "donor information", and select "On-line Pledge Information") Still need help? Contact your unit project officer or call the CFC director at (210) 352-7140.

CHARITY BROCHURE



- Table of Contents
- CFC Information
- Alpha Index of Charities
- Local Charities
- National Charities
- International Charities
- Suggested giving guide



CHARITY BROCHURE



- Information in Charity Brochure
 - Charity Code (use current list – 5 digit codes)
 - Charity Name
 - Phone number
 - Website address
 - EIN # (employer identification number)
 - 25 word description
 - Charity's management/fundraising %
 - Taxonomy Code

33037 Haven for Hope of Bexar County (210)220-2100 www.havenforhope.org EIN#208075412 Providing the homeless with training, skills, and comprehensive social services needed to help them become self-sufficient. Our mission is to transform and save lives. 6.4% J,L,P

ON-LINE CHARITY LIST



Home | About CFC | Donor Information | Campaign Materials | Charities | Contact

San Antonio Area CFC (#0852) *Serving: Banderas, Bexar, Comal, Guadalupe, Kerr, Kendall and Medina Counties*

Welcome to the SAN ANTONIO Combined Federal Campaign

The 2014 San Antonio CFC raised over \$3.366M, making us the 9th largest campaign on the planet! Thanks to all who helped orchestrate unit campaigns, leaders who promoted and encouraged giving in the workplace, and most importantly... to all who contributed to make a difference in this community, nation-wide, and throughout the world.

"GAME ON!"... "FIGHT'S ON!"... "SHOT OUT!"
The 2014 San Antonio CFC has officially begun (1 Sept - 15 Dec)
Check with your unit project officer for campaign materials and pledge options

2014 Contributions

SAN ANTONIO AREA CFC'S CAMPAIGN TOTALS

OUR GOAL
\$4,600,000

So far we've received donations of \$3,365,636 or 73% of our goal of \$4,600,000. Thank you for your generous contribution!

CURRENT CAMPAIGN TOTAL
\$3,365,636 or 73%

Multimedia

- 2015 CFC San Antonio Video
- 2015 CFC San Antonio Poster
- 3 Ways to Pledge
- 2015 Charity Brochure (pdf)

Questions? Comments?
[Contact Us](#)

813946
<http://www.freecountercode.com>

Copyright © 2015. All rights reserved.
This is the official Combined Federal Campaign website for the San Antonio Area CFC.
This site has been reviewed and approved by the [State of Texas Charitable Contribution Campaign](#) for the 2015 campaign.
For questions regarding the website, [contact us](#).

CHARITY SEARCH TOOL

TYPE SEARCH TERMS (5 DIGIT CODE, CHARITY NAME, ETC) THEN ENTER

NO SEARCH FILTERS | **SEARCH OPTIONS**

SELECT THE TYPE OF SEARCH/LIST

CATEGORY LIST | **CHARITY SEARCH** | **FEDERATION LIST**

SHOW: EVERYTHING | SEARCH: EVERYTHING | SORT: RANDOM

BROWSE THE ENTIRE LIST BY TYPE *sort filter will apply*

ALL | **LOCAL** | **NATIONAL** | **INTERNATIONAL**

RESET | **PERFORM SEARCH**

DONATION OPTIONS



WAYS TO GIVE

DESIGNATE

LOCAL

Services provided in San Antonio
or throughout Texas



NATIONAL

Services provided throughout U.S.A.



INTERNATIONAL

Select individual agencies or enter "11111"
to give to all International agencies



UNDESIGNATE

TO ALL AGENCIES

Shared among all agencies proportional to
the amount they received in designations



PLEDGE CARD



MARKING EXAMPLES

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| A | C | M | R | X | 2 | 5 | 7 | 9 |
|---|---|---|---|---|---|---|---|---|

CFC
 P.O. Box 898 • San Antonio, TX 78201-0898 • www.cfc.org

ATTENTION PAYROLL OFFICES: Only use these numbers to identify the local campaign.
CFC CAMPAIGN No. 0852
CITY/STATE CODE: 48 6090

FALL 2016 SAN ANTONIO AREA COMBINED FEDERAL CAMPAIGN
 P.O. Box 898 • San Antonio, TX 78201-0898 • www.cfc.org

ACCOUNT NUMBER: _____ BUNDLE NUMBER: _____ WORK PHONE: _____

FALL 2016 SAN ANTONIO AREA COMBINED FEDERAL CAMPAIGN
 P.O. Box 898 • San Antonio, TX 78201-0898 • www.cfc.org

TO THE PAYROLL OFFICE: _____

CASH/CHECK: _____

\$ _____ x 12 Months = \$ _____ - OR - \$ _____

SERVICE BRANCH (please check one):
 USA USN USAF USMC USCG OTHER

CHECK NO. _____

CIVILIAN PAYROLL DEDUCTION:
 GIFT AMOUNT (PER PAY PERIOD) \$ _____ x 26 Pay Periods = CALCULATE TOTAL CONTRIBUTION AMOUNT \$ _____ - OR - \$ _____

PAYROLL PROVIDER (please check one):
 DFAS NFB NFC IBC USFS OTHER

CHECK NO. _____

CFC organizations do not provide goods or services, in whole or partial consideration, for any contributions made to the organizations via this pledge card.

DESIGNATION(S)

| DESIGNATION(S) | CHARITY CODE | ANNUAL AMOUNT |
|---|--------------|---------------|
| The total of ALL designations must equal your total gift. | | |

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. **CFC LOCALITY CODE 0852**

PERSONAL E-MAIL ADDRESS: _____

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. **CFC LOCALITY CODE 0852**

Social Security Number/Employee I.D. (REQUIRED)

Signature: _____ Date: _____

PLEDGE CARD



MARKING EXAMPLES

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| A | C | M | R | X | 2 | 5 | 7 | 9 |
|---|---|---|---|---|---|---|---|---|



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FALL 2016 SAN ANTONIO AREA COMBINED FEDERAL CAMPAIGN

P.O. Box 898 • San Antonio, TX 78293-0898 • www.cfcsanantonio.org

| | | | |
|----------------------|----------------------|--|--|
| ACCOUNT NUMBER | BUNDLE NUMBER | WORK PHONE | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> - <input type="text"/> - <input type="text"/> | |
| LAST NAME | MI | FIRST NAME | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | |

FIRST SECTION

- Account Number - Unique code assigned to your organization (available from PO/KW)
- Bundle Number - Will be the same number printed on bundle/report form
- Work Phone - For questions
- Name

PLEDGE CARD



| ALLOTMENT SOURCE (include cents; do not round) | | | | | | ↓ MAKE CHECKS PAYABLE TO THE COMBINED FEDERAL CAMPAIGN ↓ | |
|--|--|--|--|--|--|---|--|
| MILITARY & JUDGE PAYROLL DEDUCTION: | | | | | | MILITARY & JUDGE CASH/CHECK: | |
| GIFT AMOUNT (PER MONTH) | | | CALCULATE TOTAL CONTRIBUTION AMOUNT | | | TOTAL CONTRIBUTION AMOUNT | |
| \$ <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> x 12 Months = | | | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> | | | - OR - \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> | |
| SERVICE BRANCH (please check one): | | | USCG OTHER | | | CHECK NO. _____ | |
| <input type="checkbox"/> USA <input type="checkbox"/> USN <input type="checkbox"/> USAF <input type="checkbox"/> USMC | | | <input type="checkbox"/> USCG <input type="checkbox"/> OTHER | | | | |
| CIVILIAN PAYROLL DEDUCTION: | | | | | | CIVILIAN CASH/CHECK: | |
| GIFT AMOUNT (PER PAY PERIOD) | | | CALCULATE TOTAL CONTRIBUTION AMOUNT | | | TOTAL CONTRIBUTION AMOUNT | |
| \$ <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> x 26 Pay Periods = | | | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> | | | - OR - \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> | |
| PAYROLL PROVIDER (please check one): | | | USPS OTHER | | | CHECK NO. _____ | |
| <input type="checkbox"/> DFAS <input type="checkbox"/> NPB <input type="checkbox"/> NFC <input type="checkbox"/> IBC | | | <input type="checkbox"/> USPS <input type="checkbox"/> OTHER | | | | |

CONTRIBUTION

- Method – PRD / Cash or check
 - PRD - Enter amount to withhold & calculate annual amount, OR
 - Cash / Check – Enter total Amount (checks payable to “CFC”)
 - Service Branch – Check appropriate box
 - Payroll Provider – Check appropriate box

PLEDGE CARD



- **WHITE copy (SCAN COPY)**
 - Goes to Project Officer for turn-in to CFC office with “bundle” report
- **YELLOW copy (PAYROLL OFFICE COPY)**
 - Goes to Project Officer for turn-in to payroll or disbursing department
- **PINK copy (CONTRIBUTOR’S COPY)**
 - Goes to donor for his or her records

PROCESSING PLEDGE CARDS



- Divide pledge cards into FIVE stacks:
 1. MILITARY PRD cards
 2. CIVILIAN PRD cards
 3. ALL CASH cards
 4. ALL CHECK cards
 5. ALL “CONFIDENTIAL GIFT” envelopes
- For each stack:
 - Count the number of pledge cards in stack
 - Tally the “TOTAL ANNUAL GIFT” amount of the cards

BUNDLE REPORT



- Signature/phone number of project officer submitting report
- Signature/phone number of payroll office person accepting payroll copy
 ** (If Payroll copies were mailed to payroll office, enter address sent to)

COMBINED FEDERAL CAMPAIGN REPORT FORM #4

MARKING EXAMPLES: A C M R X 2 5 7 9

CHECK HERE IF THIS IS YOUR FINAL REPORT

BUNDLE NUMBER **900480**

INSTRUCTIONS:

- Do not include more than 100 pledge cards for each summary report.
- Checks must be made payable to the Combined Federal Campaign.
- Do not staple checks or currency to any form.
- Bundle checks and currency separately.
- Appropriate payroll representative must sign form.
- UW cashier window is open from 8:30 a.m. to 3 p.m. (M-F)
- Do not place CFC bundles in the UW drop box.
- DO NOT SEPARATE THESE COPIES.** UW Cashier will verify and initial reports.

DAY MO YEAR ACCOUNT NUMBER NAME OF FEDERAL INSTALLATION OR AGENCY

| TOTAL CONTRIBUTIONS FOR THIS REPORT | | FOR AUDIT USE - PLEASE DO NOT WRITE IN THIS SECTION | | | | | |
|-------------------------------------|-----------------|---|--|-------------------|--|----------------|--|
| | NUMBER OF CARDS | DOLLAR AMOUNT | | AUDIT ADJUSTMENTS | | AUDITED VALUES | |
| Military Payroll | | \$ | | \$ | | \$ | |
| Civilian Payroll | | \$ | | \$ | | \$ | |
| Total Payroll | | \$ | | \$ | | \$ | |
| Cash | | \$ | | \$ | | \$ | |
| Checks | | \$ | | \$ | | \$ | |
| Total Contributions | | \$ | | \$ | | \$ | |
| Sealed Envelopes | | | | | | | |

Date Initial Date Initial

Prepared by (PRINT NAME) _____ (Signature) _____ Phone _____ Date _____

Received by Military Payroll (Signature) _____ Date _____

Received by Civilian Payroll (Signature) _____ Date _____

Received by PCFO (Signature) _____ Date _____

DO NOT SEPARATE THESE COPIES. UW Cashier will separate.

White Copy of pledge cards stay with bundle

CFC FAQs



How did the charities get in there?

- Criteria in the federal register (regulations)
 - IRS determination of non-profit status (501c3)
 - Tax Form 990
 - Financial Audit (revenues greater than \$100,000)
- All applications are screened by federal employees
 - OPM - Office of Personnel Management
 - National and International charities
 - LEVEL Committee
 - Local charities

CFC FAQs



Why designate?

- Support charities of your choice
- Undesignated goes to all charities that receive designations
- There are charities that you may not support in the brochure
- Make sure you designate your donation!

CFC FAQs



Did my money go to the charity I designated?

- Data entries are verified
- Database will not accept invalid codes
- We will not release names to the charity unless authorized by donor by checking options box
- The CFC is audited annually

A FEW THINGS TO CONSIDER...



- Payroll deduction
 - Easier to give
 - Allows donors to make a bigger difference
 - Starts January 2017 and continues through December (automatically stops at end of CY)
 - On-Line pledges done directly through payroll provider
- End of Service

Payroll deduction will automatically stop upon end of service
- Reservists/Guardsmen

Giving is via cash or check (Depends on status)
- Contractors

They may participate via cash or check

YOU CAN...
MAKE A DIFFERENCE!



For Assistance Contact

Your Loaned Executive (will be assigned NLT 15 Aug 2016)

or

Rick Robel rrobel@unitedwaysatx.org (210) 352-7140

