

# 2009 Alaska CFC Reference Guide



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## **CFC Structure and Key People**

**Office of Personnel Management:** The national entity regulating all Combined Federal Campaigns (CFC) throughout the nation. They enforce and create regulations for the local CFCs to follow.

**Local Federal Coordinating Committee (LFCC):** Governing board for each local CFC. Supervises and approves the work of the Principle Combined Fund Organization (PCFO).

### **Alaska LFCC Members:**

Alice Morgan, Management & Program Analyst, Federal Aviation Administration (LFCC Chair)

Julia Dougan, Associate State Director, Bureau of Land Management (Campaign Chair)

Larry Crane, Bureau of Land Management

Richard Mauer, Fort Wainwright

Dave Curry, Bureau of Land Management

Cathy Pearson, Fish & Wildlife Service

Ted Fathauer, National Weather Service

Dawn Peppinger, Postal Service

Robert Fimon, Postal Service

CMS Carolyn Reynolds, Ft. Greely

Lucy Gifford, Veteran's Admin.

Randy Rogers, Federal Aviation Admin.

Joy Kuntz, Transportation Security Admin.

Ken Russell, Eielson AFB

Bob Lewis, Federal Aviation Admin.

Althea St. Martin, Congressional Offices

Gerrie McGary, Internal Revenue Service

Kathy Wilson, Bureau of Indian Affairs

**Principal Combined Fund Organization (PCFO):** The United Way of Anchorage is hired by the LFCC to manage the Alaska CFC. The PCFO is responsible for developing materials, serving as a fiscal agent, distributing, collecting, and processing pledge forms, and training loaned executives and other campaign personnel.

### **Alaska CFC Staff:**

Jennifer Wukasch, Director

Jessie Bettin, Relationship Manager

## **Facts and History:**

### **Facts:**

The state of Alaska is comprised of almost 35,000 federal employees: three Army bases, two Air Force bases, the Coast Guard, Army and Air National Guard, and a wide variety of other federal agencies. Although the bulk of federal employees are located in the Southcentral region of Alaska, approximately 7,000 federal employees constitute the Northern region of the state and 3,500 represent the Southeast region. Alaska is the largest geographic CFC in the



Nation, and has overcome its geographic hardships to raise over \$1.5 million during the 2008 campaign. Thanks to a dedicated workforce of federal employees, Alaska is able to remain a steady force in the local, national, and international philanthropic communities.

### **History:**

Prior to the 1950's, federal workplace fundraising was uncontrolled and left both the employees and charities dissatisfied. In some cases quotas were established by supervisors pressuring employees to donate, and in other cases employees were not allowed to donate. Total donations remained low, even with the frequency of solicitations in the workplace, due to the lack of easy and convenient giving options like payroll deduction; thus employees would often donate pocket change or nothing at all.

President Eisenhower tasked a committee to study the philanthropic workplace campaign problem. After a tireless two year study, the first "combined" campaigns, officially called "Combined Federal Campaigns" or "CFC" were conducted as experiments in six cities, consolidating all drives into one. The result was a substantial increase in contributions, ranging from 20% to 125%, and a highly favorable response within the federal community.

By 1971 all campaigns had become "combined." President Nixon announced in 1971, that the CFC would be the uniform fundraising method for the federal service. Another major

change at the time was the introduction of payroll deduction as a form of charitable contribution. This was made possible only by a truly combined, once-a-year campaign and greatly increased the size of contributions. Revisions and changes of the regulations continued throughout the next several decades.

The CFC today is known to be the most inclusive workplace giving campaign in the world with the number of participating charities estimated at over 20,000 nonprofit charitable organizations worldwide. Contributions have increased steadily with the revisions made to the campaign throughout the years. Since the first results were recorded in 1964 approximately \$5 billion has been raised. Despite dramatic downsizing in the Federal workforce during the 1990's, the amount received in donor contributions rose steadily with half of the nearly \$5 billion raised in the last decade or so.

## **Questions & Answers**

### **Why should I contribute through CFC rather than directly to the charity?**

- 1) Charities prefer to process one check from CFC rather than many checks from each individual donor.
- 2) Charities can plan their budget and activities because they know at the beginning of the year how much donors pledged to them for the following year.
- 3) Payroll deduction, which is only available through the CFC, is an easy way to donate a small amount each pay period, which in the end creates a larger donation than most people would be able to give upfront.
- 4) By contributing and encouraging others to contribute, an environment of giving is created, producing more revenue for the charities.

### **After turning in the pledge form, what happens to my money?**

If giving by payroll deduction, your payroll office will begin reducing your paycheck by the amount indicated after the first of the new year, and your donation will be sent to the PCFO for further processing. Cash and check donations will also be sent to the PCFO for further processing.

The PCFO then processes all pledge forms, deducts overhead costs, and sends quarterly checks to the agencies designated. If you did not designate to a specific agency, your donation will be added to the undesignated fund, and will be distributed based on the percentage designated to each agency in the Charity Listing. For example, if Agency ABC did not receive any designations, they will not receive any money from the undesignated fund. However, if Agency 123 was designated 5% of all donations from the Alaska federal employees, they will receive 5% of the undesignated fund.

### **What else do I need to know about the designation process?**

- 1) By filling out the “Release of Information” section of the pledge form, you are permitting your designated charity to send you an individual letter of thanks. However, they are only allowed to send you a thank you letter, any other correspondence should be reported to the Alaska CFC staff or your coordinator. If you wish to receive other information from the charity, you must contact them directly.
- 2) You can only designate money to charities listed in the current campaign year’s Charity Listing.
- 3) Contributions are tax-deductible. To ensure you receive your tax deduction, you **MUST** keep a copy of your pledge form/confirmation email (if e-pledging) **AND** the last pay stub of the giving year or your W-2.

### **What are the Alaska CFC’s administrative costs and where do they come from?**

The Alaska CFC administrative cost (aka administrative and fundraising rate (AFR)) was 9.0% for the 2008 campaign. This was a reduction of 2.2% from the year before. Administrative costs for the campaign include, but are not limited to: campaign materials, office supplies, recognition gifts, printing, shipping, personnel, and yearly audits.

### **Why are some charities listed, and others are not?**

Every year charities are solicited via advertisements in the community, public forums, and through word of mouth. The charities in the listing completed the extensive application and were found to meet all OPM requirements. Each agency must meet strict guidelines and be approved by the LFCC to participate. Some agencies do not meet the stringent requirements, and are

denied based on OPM regulations. Many agencies do not apply and may not even know about the opportunity. By referring an agency to us, you can help grow the local charity listing. Some agencies also choose not to reapply based on the amount of designations they received in prior years.

**Why should I support a campaign that includes organizations I do not like?**

CFC does not pass judgment on the agency's mission or work. We invite a wide variety of agencies to apply, as the federal workforce is made up of a wide variety of people from all different backgrounds. Thus, we hope there is something for everyone. All charitable agencies that apply and meet OPM regulations will be accepted. You have the option to choose where your donation goes, and can choose not to donate to agencies you dislike.

**Why donate when I do not use any of the services provided by the charities in the listing?**

There are not many of us that can say we have never been impacted by one of the organizations in the listing. Most children's sports and recreation leagues are run by your local YMCA or Boys & Girls Club; friends and family may have been helped by the knowledge gained through disease research, or your family pet may have come from the local humane society. Even if you are not directly affected by one of these charities, you probably know someone that has been, and we all benefit from a community that is strong and is able to help others. One day we all may need a service represented by one of these agencies. Thus it is important to make sure they survive and are strong.

## **Top 5 Reasons to Support the CFC**

This is YOUR charitable giving campaign! The CFC emerged to protect the federal workforce from over solicitation, being forced to donate, and being forced not to donate.

CFC is a tried and true campaign. It has been a successful method of raising donations for charities for over 40 years.

The process is easy, convenient, and confidential.

CFC staff/OPM screen the approximately 2,000 listed charities each year, to ensure your designation is going to a financially responsible organization. Besides, with thousands of charities to choose from, there is something for everyone!

Not everyone has the opportunity to work in the humanitarian fields, but everyone can support them by just showing up to your regular job!

## **Know Your Organization**

- 1) Be aware of how your agency's size, location, and daily office environment impacts your co-workers.
- 2) Utilize a variety of solicitation methods to reach everyone: staff meeting announcements, email asks, events, personal asks, top-down support, and competitions.
- 3) 100% informed consent is the key to success. It is important that everyone be given the opportunity to donate and is informed about CFC so they can make an educated decision when deciding whether or not to donate.
- 4) Be generous with your thanks. Thank everyone that listened, helped, donated, and/or declined to listen. This campaign is a positive opportunity to give to your community, and we want to leave people with a positive impression of CFC whether or not they choose to donate.

## Website/E-Pledging

The website can be viewed at [www.alaskacfc.org](http://www.alaskacfc.org). Updated agency totals, charity success stories, donor information, OPM/CFC information, and a variety of other tools and resources can be found. The newly established e-pledging site can be accessed via the website. For question or comments related to the website and e-pledging, please contact the Alaska CFC staff.

## Understanding the Charity List

In an effort to save paperwork, the charity list can be found in a variety of forms in several places. The most conservation effective version can be found on the website at [www.alaskacfc.org](http://www.alaskacfc.org). There will also be two hardcopy versions circulated. The first is a full listing including the 25 word descriptions of the agencies, and the second version does not include the 25 word descriptions.

**Online Version:** The Charity List can also be found online at [www.alaskacfc.org](http://www.alaskacfc.org), where you can search by keywords in the charities name, taxonomy codes, or the five digit CFC code assigned to each participating charity. The 25 word statements are also included online.

**Full Version:** The complete Charity List is broken down into several sections. The first section is a letter of support from the 2009 Campaign Chair, Julia Dougan followed by a mandatory section provided by OPM explaining the Combined Federal Campaign and the Charity List. The third section is an alphabetical listing of the current approved charities. The last section consists of all the charities. Every year the local, national, and international charities position within the listing are rotated. For the 2009 campaign, the national charities are listed first, then the local charities, and lastly the international charities are listed.

Each charity is listed within the Charity Listing with the same key pieces of information.

- 1) Charities are listed alphabetically under the federation they are a member of or under the independent/unaffiliated heading by the name they do business as (DBA) with their legal name in parentheses if it is different from the DBA.

- 2) Their contact phone number and a website (if applicable) are listed next. This information is provided to the donor so that they make contact with the charity if they have additional questions.
- 3) After the website is the EIN#, which is the number used by the IRS to determine nonprofit status.
- 4) Following the EIN# is the 25 word description, which explains the mission and/or services provided.
- 5) Charities can then choose to list up to three taxonomy codes, which are general categories that the charity falls under. If the charity does not choose any code, they will be assigned the letter Z for the category of “other.”
- 6) The last piece of information given is the administrative and fundraising rate (AFR). This is the percent of your dollar that goes to the charities administrative costs. The rest of the money will then go directly toward charity services. Many military based organizations do not have EIN#s and have no overhead percentage, thus are listed with an AFR of zero.

**Short Version:** The short version of the Charity Lists provides an index referencing where you can find the national, local, and international/national sections within the book. The book is then arranged alphabetically under each one of those headings.

## **Pledge Form Instructions**

The pledge form is the donor’s most valuable piece of information. It is important to fill the pledge form out completely and accurately as this will expedite the process and keep pledge processing costs to a minimum.

There are five main areas to complete:

- 1) Background Information: Name, civilian/military check boxes, social security number/employee ID, work address, and work phone number. It is important for tracking purposes and potential follow-up to write in your location.

- 2) Giving Options: Decide which method of giving is right for you and check the corresponding box. Fill in the requested information under the chosen giving option. For payroll deduction, check your math to make sure the per pay period allotment equals the total annual pledge once you multiply it by your number of pay periods. It is also important to sign and date the pledge form when donating via payroll deduction as it will not be processed otherwise. The signature block can be found in the bottom right hand corner of the pledge form. Checks should be made payable to the **Alaska CFC**, and not to the designated agency.
- 3) Charity Codes: Enter the five digit code of the corresponding agency, which can be found in the Charity Listing or on the website at [www.alaskacfc.org](http://www.alaskacfc.org). It is also important to be aware that you may only designate to a charity in the 2009 approved Charity Listing. No write-ins will be accepted. After designating a charity, indicate the amount(s) you would like to donate to each chosen charity.
- 4) Gift Options: You may choose to receive no gift, or you may choose the gift that corresponds to your level of giving. Only one gift will be provided and you must donate the amount required or more to receive the gift. It is acceptable to request one of the items under your giving level, but you may not request a higher gift. For example, if you donated at the Summit Club level, but would rather have the eco-tote than they print, you may do so.
- 5) Recognition Options: If you would like to be recognized by a thank you letter from the charitable organization you designated, fill in the contact information in the spaces provided. You **MUST** check the boxes and fill in the corresponding information you would like shared with the charity. If nothing is filled in or the box is not checked (even if you provide your contact information), no information will be released to your charities of choice.

## **Envelope Instructions**

The envelope is a very important information source. It helps us quickly track the total number of donors, type of payment, and location of donors. It is vital to fill out the envelope face correctly.

- 1) Fill in the federal agency the donations have come from as well as the address. Separate donations from different locations into separate envelopes. For example, we track pledges by region: Northern, Southcentral, and Southeast. If you are unsure of which region a city might fall under, separate the donations from differing cities into separate envelopes. For example if you have donations from Anchorage and Glennallen and you are unsure which region Glennallen falls into, put the Anchorage donations in one envelope and the Glennallen donations into a different envelope.
- 2) Include the coordinator and keyworker as well as the coordinator's contact information.
- 3) It is important to include the correct donation amounts separated between payroll deduction and checks or cash. Also include the number of donors for each and fill in the totals for both. Current statistics and agency progress is determined by the information on the face of the envelope.
- 4) Lastly, it is extremely important to distinguish whether or not the donations came from a fundraiser. If the donations came from a fundraiser, you do not need to know how many donors contributed. For example, it would be extremely difficult to determine how many people donated at a bake sale. We do not include those donations in the total number of people donating as the fundraisers are used a way to encourage people to donate via payroll deduction or check, and are not supposed to take the place of the official donation.
- 5) Do not forget to separate cash into the designated "Cash Envelope" and checks and payroll deduction pledge forms into the "Check/Payroll Deduction Envelope."
- 6) Please submit all envelopes weekly to the Alaska CFC at 701 W 8<sup>th</sup> Avenue in Anchorage, AK 99501.

## **Recognition Gifts**

Please submit a list of donors that wish to receive recognition gifts along with how many of each gift you need. By turning this in weekly, we can get you the gifts more quickly thus giving the donor their gift in a speedy and efficient process. We would like the donor to receive their gift within two weeks of making a donation. If a donor chooses a gift via e-pledging, we will provide you with a list of donors and the gift so that you may get the gifts to donors. Please remember that as coordinator, timely disbursement of gifts is one of your responsibilities so the more organized you are the easier your job will be!

**Thank you for your time, energy, and commitment to the  
2009 Alaska Combined Federal Campaign!  
Your efforts are appreciated by many!**