



2016
2017

KEY CONNECTOR (KC)
TRAINING MANUAL





CALIFORNIA STATE EMPLOYEES GIVING AT WORK

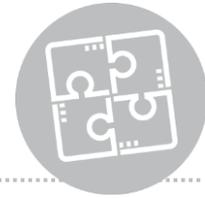


California State Employees Giving at Work is committed and dedicated to communities across the state, and is the single largest effort among state employees to support nonprofits in their community. Giving back is our promise to California.

Our Promise speaks clearly to our past (serving California since 1957) and our ongoing commitment to helping those in need of support and assistance.

With your leadership, state employees will have an organized, efficient way to give to the nonprofits they are most passionate about. Thank you for your dedication to our state, our communities, and our neighborhoods.





CAMPAIGN STRUCTURE

STATEWIDE LEADERSHIP TEAM

Appointed by the Secretary, Agency-level leaders are responsible for top-level leadership and inspiration in the implementation and execution of Our Promise. From recruiting Department Chairs to mentoring fellow California State Employees, these champions play a critical role in this initiative.



STATEWIDE DEPARTMENT CAMPAIGN CHAIRS

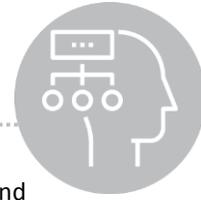
Statewide Department Campaign Chairs are the “go-to” people in each respective department charged with educating, recruiting and inspiring their fellow California State Employees to be part of this initiative. Our Promise is your promise to make a real difference in your workplace and our community.



KEY CONNECTORS

Key Connectors are committed, passionate advocates identified and recruited by the statewide department campaign chairs. They’re responsible for the solicitation of a specific number of employees (25-30) in a department. They are active members of the team and are vital to the Our Promise \$7 million goal. The way to accomplish this goal is to have “100% Ask.” Key Connectors are primarily responsible for the distribution, collection and verification of all pledge forms and more importantly, inspiring others to contribute to the collective impact of Our Promise.

KEY CONNECTOR

POSITION STATEMENT**General Nature, Scope and Purpose of the Position:**

Key Connectors are recruited by the Statewide Department Campaign Chair and are responsible for the solicitation of a specific number of employees (25-30) in a department. They are active members of the Campaign Team and are vital to ensuring the Our Promise goal of “100% ASK.” Key Connectors are primarily responsible for the distribution, collection, and verification of all pledge forms.

Responsibilities:

- Attend one Key Connector training session (August-early September)
- Sign a confidentiality agreement form (located on page 6 of the KC training manual)
- Attend campaign team meetings conducted by the Department Campaign Chair (DCC)
- Work closely with the DCC to achieve objectives defined in his/her campaign plan
- Make the Our Promise talking points your own and know the role of United Way in the campaign
- Encourage co-workers to attend Our Promise presentations and events
- Distribute pledge forms (and other campaign materials), making a personal solicitation of 25-30 employees to ensure the Our Promise goal of “100% Ask”
- Answer individual employee questions and refer to FAQ’s at [OurPromiseCA.org /faqs](http://OurPromiseCA.org/faqs)
- Follow up with those who did not attend group solicitation meetings or who were in attendance but did not turn in their pledge form, to see if they have questions on how to participate
- Offer each donor who turns in a pledge form the Confidential Pledge Form envelope to enclose their pledge forms personal information (contribution details and SSN)
- Ensure that donors have properly completed the Confidential Pledge Form envelope checklist before accepting the envelope by reviewing the below items with the donor, confirming each item is checked:
 - A full SSN
 - A minimum monthly contribution amount of \$5 or more
 - A signature and date
 - Notification for the presence of cash or check
- Lock all collected Confidential Pledge Form envelopes and pledge forms not collected in envelopes in a secure location identified by the DCC
- Thank donors for participating and thank others for their consideration of the campaign
- As the campaign closes, return completed Confidential Pledge Form envelopes and all audited pledge forms not collected in envelopes (as not all will be in envelopes, per donor choice) to the campaign contact within your office for them to return to your Local PCFD (aka United Way) for processing
- Assist in the delivery of Leadership certificates/incentives at the end of the campaign

Best Practices:

- Make your pledge first before asking others to participate
- Understand your audience, ask yourself: What is this particular group/individual passionate about?
- Last, but not least, should you encounter rejection, please do not take it personally, kindly thank the individual for their time and consideration

CONFIDENTIALITY AGREEMENT FORM



I understand and acknowledge that I have an obligation to protect and keep confidential all donor data/information whether printed, written, spoken, or electronically produced with which I come in contact with during the Our Promise: California State Employees Giving at Work campaign (OP). Further, I agree to abide by and enforce all policies and procedures regarding the handling of donor pledge forms for security/confidentiality measures currently outlined in the Key Connector training manual (which follow the requirements set in the California Information Practices Act and Government Code 11019.9) or which may be implemented or revised from time-to-time.

By signing below, I hereby certify that I will treat donor information such as social security numbers, contribution amounts, selected nonprofits and giving history as confidential and will not under and circumstance disclose such information to anyone outside of OP, either during or after my engagement with OP, except with the written consent of OP Staff.

If volunteer breaches or threatens to breach any provisions of this agreement, OP will be entitled to an injunction restraining volunteer from such breach, but nothing herein is to be construed as prohibiting Our Promise from pursuing any other available remedies for such breach or threatened breach.

→ *Failure to sign this document will prohibit an individual from becoming a Key Connector, prohibiting the handling of donor pledge forms and data.*

SIGNATURE OF VOLUNTEER

PRINT NAME

DATE

SAMPLE CAMPAIGN COMMUNICATION



Dear:

Our Promise: California State Employees Giving at Work is committed and dedicated to communities across the state, and is the single largest effort among state employees to support nonprofits in their community. This is our promise to California.

Our Promise speaks clearly to our past (serving California since 1957) and our ongoing pledge to help those in need of support and assistance across the state.

My experience has always shown that the more you give, the more you get in return.

Contributing through **Our Promise** is your investment in the lives of your neighbors and community through the thousands of eligible 501(c)(3) nonprofits that you can find at ourpromiseca.org/find-nonprofit. If you are unable to locate a nonprofit, you can still designate your gift by utilizing the “write-In” portion of the pledge form. This campaign is all about your choice and giving to causes that have touched your life or the lives of the ones you loved.

Giving through payroll deduction is not only convenient, but allows you to give as little as \$5 per month, spreading your total gift over twelve months. Additionally, nonprofits are able to rely on the steady donations that you give through each pay check.

Join me in contributing to this year’s **Our Promise** initiative. There is no better way to help so many people in need.

For more information or for assistance in donating, feel free to contact a member of your department’s **Our Promise** campaign team.

Sincerely,

[Name]

[Title]

SAMPLE CAMPAIGN PRESENTATION OUTLINE



Introduction

- Thank you
- Introduce yourself
- Today I'm going to talk about
 - Our Promise and our department's support
 - Introduce nonprofit X
 - How you can participate in Our Promise to make a difference

Our Promise

- Introduce Our Promise
 - Established in 1957, largest effort among state employees
 - "100% ASK" goal
- Highlight Our Promise results from last year
- Explain how you can donate
- Stress the importance of payroll deduction and how you can give more by giving a little each month.

Nonprofit Introduction

- Name
- Nonprofit gives presentation

How you can participate

- Donate to your favorite nonprofit through Our Promise
 - Thousands of nonprofits to choose from: www.OurPromiseCA.org/find-nonprofit
 - Any tax-exempt 501(c)(3) organization in the U.S.

Wrap-up

- We hope you'll get involved
- Mention any specific department events/activities
- Thanks for coming today and taking the first step



FREQUENTLY ASKED QUESTIONS

How Do I Decline or Indicate I Do Not Wish to Participate?

If you choose not to participate in Our Promise: California State Employees Giving at Work, you may simply put a slash through your form and if you wish, return it to the appropriate contact within your department.

What is a PCFD?

A Principal Combined Fund Drive (PCFD) aka Local United Way, is the entity responsible for managing the Our Promise initiative for a specific geographic region in the state of California. Your local PCFD coordinates the annual workplace giving campaign for your region. Our Promise donors must select a PCFD to manage their donations. The PCFD you select receives your donation and distributes your gift to your designated nonprofit(s).

How do I confirm the amount of my current Our Promise deduction and which nonprofit organization(s) I've chosen?

The vast majority of state employees with questions about their current deduction and/or designation(s) should call our toll-free Donor Hotline 1-(888) 863-6466. Please be prepared to provide your name and Social Security Number.

Why should I participate as a payroll deduction donor through Our Promise?

Our Promise is an employee benefit, allowing those who choose to participate the convenience of payroll deduction to fund the nonprofit(s) they feel passionate about. State employees can participate as payroll deduction donors for as little as \$5 per month. Although this may appear to be a nominal figure, these donations result in significant investments in our communities. Many of the nonprofits have the ability to leverage your gift in ways most people cannot.

One reason for participating in payroll deduction is for financial planning purposes. Imagine if your employer paid your entire salary to you, one time a year. As you know, many people would be challenged to make it last the entire year until their next annual pay day.

The nonprofits, which are very appreciative of the donations, are still challenged with a consistent cash flow. Participating through payroll deduction provides the nonprofits you feel passionate about a consistent cash flow throughout the year, easing their ability to operate and provide their services. Also, statistics show that on average, payroll deduction gifts added up at the end of the year are approximately six times greater than one-time donations.

Last, but certainly not least.... it's tax-deductible.

For additional FAQs, visit:
OurPromiseCA.org/faqs

Where does my money go?

When approving each Principal Combined Fund Drive (PCFD) to administer the Our Promise initiative, the Department of General Services authorizes the PCFD to deduct an administrative fee, which covers administrative and fundraising costs incurred while running the campaign.

The State Controller's Office (SCO) as well as the Department of General Services also has an administrative fee.

The total combined administrative fees for the 2016 Our Promise initiative is 14% with an SCO processing fee of \$.39 per transaction.

Please consider that administrative costs are a reality of fundraising for any nonprofit organization. Our Promise allows nonprofits to use more of their resources for providing services rather than conducting fundraising campaigns.

How do I donate to my favorite nonprofit if it is not listed in the Our Promise Donor Resource Guide?

Through Our Promise, you can donate to any 501(c)(3) nonprofit. If the nonprofit of your choice is not listed in the Donor Resource Guide, you may utilize the "Write in Organization" section of the pledge form. Required information includes the nonprofit's name, tax ID number, and address.

Why is a Social Security Number (SSN) required for participation in Our Promise and how can a donor feel safe about providing this sensitive information?

Payroll deduction donations are processed through the State Controller's Office. Your SSN is the unique identifier required to ensure your payroll deduction is applied to the correct pay warrant.

Donors should feel confident that their SSN is safe and secure for Our Promise. All campaign team members are required to sign a confidentiality agreement which includes amongst many things, the security of a donor's SSN and donors are now provided with an envelope to secure their personal information so it is not seen by those they turn the form in to.

How do I continue my Our Promise payroll deduction when I retire?

By participating in Our Promise through payroll deduction, you have authorized the State Controller's Office to deduct a set amount from each pay warrant. Retirees from state service no longer receive a pay warrant from the State Controller's Office; therefore, their deduction terminates.

Retirees can have their contribution deducted monthly from their retirement check. Those who wish to participate, retirees and potential retirees, can download the Our Promise pledge form and fill out the retiree section in box 7. The minimum donation for retired employees is \$5/month.

How often are payments made by United Way to the designated nonprofits?

United Way makes payments to nonprofits donated to on a quarterly basis. This keeps the campaign's overhead low by cutting back on monthly check processing. All received money is kept in a non interest bearing account until the point of payout.

PLEDGE FORM CHEAT SHEET TOP PORTION

NEW PAYROLL DEDUCTION (Section 1)

New payroll deduction donors must:

- At top of pledge form - Provide your SSN in box A (REQUIRED)
- In Section 1: Check box and fill in boxes F and G
- In Section 12: Sign and date on the line

OPTIONAL: To direct a gift to a specific nonprofit(s) complete Section 9

NOTE: Box E should be marked XXX as this donor currently has no payroll deductions set up.

CHANGE MY EXISTING PAYROLL DEDUCTION (Section 2)

Existing payroll deduction donors who would like to change their monthly contribution must:

- At top of pledge form - Provide your SSN in box A (REQUIRED)
- In Section 2: Check box and fill in box H
- In Section 12: Sign and date on the line

NOTE: Selecting this option CANCELS your existing deduction(s). To re-designate, complete section 9.

CHANGE MY EXISTING PCFD (Section 3)

Existing payroll deduction donors who would like to change their existing PCFD, the entity that will distribute nonprofit designations and receive any undesignated portion of your deduction must:

- At top of pledge form - Provide your SSN in box A (REQUIRED)
- In Section 3: Check box and fill in boxes I and J
- In Section 12: Sign and date on the line

NOTE: Selecting this option CANCELS your existing monthly deduction and your existing nonprofit designation(s). To re-designate, complete section 9.

CONTINUE MY EXISTING PAYROLL DEDUCTION (Section 4)

Existing payroll deduction donors who would like to make NO changes to their existing monthly deduction amount and have NO nonprofit designation changes can mark Section 4.

NOTE: No SSN or signature is required to continue an existing deduction and existing designations. If the donor wishes to change their nonprofit designation(s), Section 9 must be completed and SSN is needed in Box A at top of form, then sign and date in Section 12.

DELETE MY EXISTING PAYROLL DEDUCTION (Section 5)

Existing payroll deduction donors who would like to stop their monthly deduction must:

- At top of pledge form: Provide your SSN in box A (REQUIRED)
- In Section 5: Check box
- In Section 12: Sign and date on the line

ONE-TIME CONTRIBUTIONS (Section 6)

Employees who are providing one-time cash or check gifts must:

- In Section 6: Check the box and fill in your total cash or check amount on the line

- In Section 12: Sign and date on the line

OPTIONAL: To direct a gift to a specific nonprofit(s) complete Section 9

NOTE: All checks must be made payable to Our Promise, or they will not be accepted and cash/checks must be paper clipped to a completed pledge form.

RETIREE GIVING (Section 7)

If you are retiring and would like to continue giving or to start donating through your CalPERS pay warrant donors must:

- At top of pledge form: Provide your SSN in box A (*REQUIRED*)
- At top of pledge form: Provide your first and last name in box B
- In Section 7: Check box and fill in the month and year you will be retiring as well as the monthly donation amount.
- In Section 12: Sign and date on the line

OPTIONAL: To direct a gift to a specific nonprofit(s) complete Section 9

DECLINE. I HAVE NO EXISTING PAYROLL DEDUCTIONS (Section 8)

For State employees who have NO existing payroll deduction and do not wish to start at this time, you can:

- In Section 8: Check box and provide your initial

NOTE: This is not a way to delete an existing payroll deduction. Box E at the top of the form should be marked XXX. XXX verifies you are not a current donor. If box E has a PCFD code printed, you do have an existing payroll deduction and you MUST complete section 5 to delete.

FYI: The pledge form serves two purposes. The top portion of the pledge form authorizes the State Controller's Office to withdraw or cease a payroll warrant deduction.

The bottom portion is for the PCFD who the donor selected to manage their contribution to pay out their selected designations.

***Any undesignated portion will be invested in local programs and services by the PCFD managing your funds.**

PLEDGE FORM CHEAT SHEET BOTTOM PORTION

I WISH TO MAKE THE FOLLOWING DESIGNATIONS (Section 9)

Donors wishing to designate to a nonprofit(s) approved by the VCGCB listed at OurPromiseCA.org/nonprofits must:

- In Section 9: Provide nonprofit name and nonprofit code #
- In Section 9: Provide the monthly designation amount per desired nonprofit (minimum \$5.00 per month for each nonprofit).
- In Section 9: Provide total of ALL monthly designations.
- In Section 12: Sign and date on the line.

Donors wishing to designate to a nonprofit(s) not approved by VCGCB, but has a current 501 (c) (3) filing must:

- In Write-In Nonprofit Area in Section 9: Enter nonprofit name and address (Tax I.D. # if known).
- In Write-In Nonprofit Area in Section 9: Provide the monthly designation amount (minimum \$5.00 per month).
- In Section 12: Sign and date on the line.

NOTE: “Total ALL monthly designations” must be equal to or less than the “Total monthly contribution” amount on the top half of the pledge form. Any undesignated portion of your monthly deduction amount will go to your selected managing PCFD.

ACKNOWLEDGEMENT (Section 10)

Donors wishing to be acknowledged for their gift must complete Section 10. In an effort to reduce costs an email address is preferred by your managing PCFD. Designated nonprofit(s) will receive the donor’s name and address but they may or may not send an acknowledgement.

REMAINING ANONYMOUS (Section 11)

If you would like your donation to be anonymous, please check this box. None of your information will be released to your designated nonprofits.

AUTHORIZATION (Section 12)

Any actions provided on this pledge form will not be considered complete until a wet signature and date is provided by the donor in section 12.

AUDITING WITH THE CONFIDENTIAL PLEDGE FORM ENVELOPE

CONFIDENTIAL

▶ **COMPLETE THE BELOW CHECKLIST** with an Our Promise Key Connector, then enclose your pledge form:

- Your full Social Security Number (SSN) is provided. See SSN requirements on back of pledge form.
- Your donation meets the minimum monthly contribution amount of \$5.
- You've provided a signature and date on your pledge form.
- Cash/check is enclosed. All checks must be payable to Our Promise.

For Key Connectors ONLY: If cash/check is enclosed, verify the amount matches the pledge form contribution total by initialing here: _____





Donors have the choice upon turning in their pledge forms to enclose their form in the Confidential Pledge Form Envelope.

Key Connectors will offer this envelope to donors as they collect pledge forms. Donors are not required to use this envelope, but it is offered for their use should they decide to.

For this reason, as a Key Connector you will learn two ways to audit pledge forms.

1. When a donor chooses to use the Confidential Pledge Form envelope use the steps provided below on this page (page 14).
2. When a donor chooses to NOT enclose their pledge form in the Confidential Pledge Form envelope you will audit “loose” pledge forms using the steps provided on page 15 of this manual.

Audit to ensure that donors have properly completed the Confidential Pledge Form envelope checklist before accepting the envelope by reviewing the below items with the donor, confirming each item is checked on the envelope and correct on the pledge form:

- 1** The donor’s full Social Security Number (SSN) is provided in Box A
*See SSN requirements on back of pledge form
- 2** The monthly donation amount meets the campaigns \$5 minimum monthly contribution amount
- 3** The donor provided a signature and date in section 12
- 4** If cash/check is enclosed, follow the Cash Handling Procedures on page 16 of this manual, then verify the amount placed inside the envelope matches the pledge form amount and initial the envelope in the designated area provided

AUDITING WITHOUT THE CONFIDENTIAL PLEDGE FORM ENVELOPE USED

Step 1: Divide the pledge forms into stacks based on the type of decision made by the donor. This will enable you to audit results accurately and efficiently.

STACK #	PLEDGE FORM SELECTION TYPE
1	New Payroll Deduction
2	Change My Existing Payroll Deduction
3	Change My Existing Principle Combined Fund Drive (PCFD)
4-A	Continue My Existing Payroll Deduction – No Change
4-B	Continue- Designation Change and/or Acknowledgment
5	Delete My Existing Payroll Deduction
6	Checks/Cash (Need to Be Receipted and can only be made out to OP)
7	Retired Employees
8	Decline, I Have No Existing Payroll Deduction
9	Other PCFD's - (*Anything Other Than 024 in Boxes 5&6 on Pledge Form)
10	Errors (*It is Very Important That you do NOT Submit Forms with Errors)
11	Forms Needing SSN's

Step 2: Audit each stack to verify that the pledge forms have been accurately filled out by referring to the back of the pledge form or the “Pledge Form Cheat Sheet”

Step 3: Please contact the designated person on your campaign team to give them your audited pledge forms. They will be responsible for maintaining the donor tracking report and tallying up the incentives needed for the donors in your department. **Pledge forms will be turned in to the local United Way who serves the area you work in.**

*Pledge forms should always remain in a secured and locked location, identified by your Department’s Chair/campaign team.

CASH & CHECK HANDLING BEST PRACTICES



- 1 All checks must be made out to **Our Promise**
 - a. If they are not, they must be returned to the donor for correction
- 2 With the donor present, verify the cash or check amount matches what is indicated on the pledge form
- 3 Paper clip the cash or check to the pledge form and place items in an envelope
- 4 As you and the donor agree on the total amount in the envelope, seal the envelope
- 5 Ensure both the donor and Key Connector signs the sealed envelope
- 6 If you are using an Our Promise branded envelope, instruct the donor to mark the box that verifies cash or check is inside
- 7 If you are using a blank envelope write cash or check inside on the face of the envelope
- 8 Always remember to secure checks and cash at all times in a safe, locked location identified by your department

Thank you FOR GOING
ABOVE & BEYOND
ON BEHALF OF OTHERS
& *welcome*
TO AN EXCITING YEAR OF
**MAKING A REAL
DIFFERENCE**
IN YOUR WORKPLACE
& OUR COMMUNITY!



OurPromiseCA.org