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DEAR KEY CONNECTOR,

Thank you for accepting your pivotal role in this year’s Our Promise campaign! I am honored to be your partner in this campaign journey, and your hard work will determine the Departments/Agency’s success and change lives for the better throughout our community.

Key Connectors are ambassadors who help communicate Our Promise’s purpose throughout the State of California. Being a Key Connector is a big job, and I know you will find the experience to be very rewarding.

Your guide has insights and quick tips to help you and your campaign committee members achieve success. Please look through the materials and visit Our Promise’s website at OurPromiseCA.org for more information and tools. During the campaign, I will be here to answer any questions you might have.

Thanks again for being part of Our Promise’s campaign to give every employee the opportunity to give back. I look forward to working with you.

Sincerely,

Tabitha Angel
Director, Our Promise
GENERAL NATURE, SCOPE & PURPOSE OF THE POSITION

Key Connectors are a vital part of the Our Promise Campaign. As a Key Connector you have the chance to make a personal connection with your co-workers and make a difference as a group. You are responsible for the solicitation of a specific number of employees (25-30) in your department, the Our Promise goal is to make a “100% ASK” in each department.

RESPONSIBILITIES

• Attend a Key Connector training session (August-September)
• Sign a confidentiality agreement form and return it to your Department Campaign Chair (DCC)
• Attend campaign team meetings conducted by the Department Campaign Chair (DCC)
• Encourage co-workers to attend Our Promise presentations and events
• Distribute, collect and audit pledge forms
• Familiarize yourself with the Our Promise website www.ourpromiseca.org
• Answer individual employee questions and refer to the FAQ’s on the Our Promise website at OurPromiseCA.org
• Ensure that donors have properly completed the 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 pledge forms in a secure location
• Return completed checklist pledge form envelopes 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 or find your passion before asking others to participate.
• Understand or get to know your audience: What are they passionate about?
• Thank donors for participating and thank others for their consideration of the campaign.
• 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

Failure to sign this document will prevent an individual from becoming a Campaign Representative, prohibiting the handling of donor pledge forms and data.

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 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.

SIGNATURE OF VOLUNTEER

PRINT NAME

DEPARTMENT NAME

DATE

☐ Attended KC Training

☐ Turned Form into DCC
PLEDGE FORM

2019 OUR PROMISE : KEY CONNECTOR TOOLKIT

Please print legibly using a ball point pen.

NAME

Home Address

Phone* [Work] [Cell]

Personal Email*

*If the nonprofit you’ve selected cannot be located or is not a qualified organization, we will make every reasonable attempt to contact you for 30 days before directing that portion of your gift to United Way. For us to contact you, a phone number or email address must be provided above.

MANAGE DONATION

Select only one action from the seven options below.

1. START A NEW ONGOING PAYROLL DONATION. Complete Box A with full social security number, then sign and date below.

2. CHANGE YOUR CURRENT ONGOING PAYROLL DONATION. Complete Box A with full social security number, then sign and date below.

3. RETIRING? Give after retirement through CALPERS. Fill out Box A and B, complete section 8, then sign and date below.

4. MAKE A ONE-TIME GIFT WITH CASH OR CHECK. Does not affect existing payroll deductions. Only checks payable to Our Promise can be accepted. Complete section 8, then sign and date below.

5. MAKE NO CHANGES. Keep things “as is” from the previous year; your donation will automatically rollover. Please initial here.

6. CANCEL YOUR EXISTING PAYROLL DONATION. Complete Box A with full social security number, then sign and date below.

7. DECLINE PARTICIPATION. Sign and date below. NOTE: If you have an existing payroll deduction, please use ACTION 6 above.

SELECT NONPROFIT(S)

Please complete this section if you selected Action 1, 2, 3, or 4 above. You can direct all or part of your donation to the nonprofit(s) of your choice.

There is a minimum of $5/month PER nonprofit that you select. To find specific nonprofits certified by the Our Promise campaign along with their unique OP Code#, please reference the Printed Nonprofit Guide or OurPromiseCA.org/find-nonprofit.

If your preferred nonprofit is not listed in our guide, and they have a current 501(c)(3) filing, please visit GuideStar.org to easily find their EIN/TAX I.D. # to complete this section.

Please be sure to include the EIN or Tax I.D. number so your donation can reach your chosen nonprofit.

I authorize the state controller to release my donation and UWCCR to process my selected donations to my nonprofit(s) as indicated.

Signature required (ink only)

Only pledge forms with action required need to be returned. For more detailed information, visit OurPromiseCA.org.

Thank you!
CARING FOR CALIFORNIA

Find your project.
Make an impact.
Support your community.

WHAT'S YOUR PROMISE?

State employees have been supporting their favorite nonprofits through payroll deductions since 1957, enabled by CA Govt. Code §14659.

Supporting your chosen nonprofit is easy! You can contribute every month through a payroll deduction, or make a one-time cash or check gift.

Your chosen organization(s) receive your support on a quarterly basis (or monthly if they're EFT-registered).

State employees have given more than $6 million dollars back to their communities, helping thousands of nonprofits make a lasting impact.

Did you know that making a donation through an ongoing payroll deduction results in an impact 6 times greater than a one-time donation?

You may change your donation at any time! Just send us a new pledge form. Visit OurPromiseCA.org for more information.

For the cost of one or two coffees a month, you can make a difference.

Your SSN is the unique identifier required to process your donation with the SCO.

Be proud of your donation and Share it! Like us on Facebook, and follow us on Instagram or Twitter!

Since 1957

Our Promise
CALIFORNIA STATE EMPLOYEES
GIVING AT WORK

CUSTOMER SERVICE
888-863-6466

DETAILED CAMPAIGN INFORMATION
OurPromise@uwccc.org
OurPromiseCA.org

FOR A FULL LIST OF FAQs, VISIT
OurPromiseCA.org/FAQs
AUDITING PLEDGE FORMS

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.

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 the next page.

AUDITING WITH THE CONFIDENTIAL PLEDGE ENVELOPE

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: __________

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 Step 4 – Box 11.

4. If cash/check is enclosed, follow the Cash Handling Procedures on page 10 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 ENVELOPE

**STEP 1**

Divide the pledge forms into stacks based on the type of decision made by the donor in the “Manage Donation” section. This will enable you to audit results accurately and efficiently.

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<th>STACK #</th>
<th>PLEDGE FORM</th>
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**STEP 2**

Audit each stack to verify that the pledge forms have been accurately filled out.

**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 or back to headquarters if so desired by DCC.**

*Pledge forms should always remain in a secured and locked location, identified by your Department’s Chair/campaign team.*
JUNE
- Key Connectors are recruited by Department Campaign Chairs.

JULY
- Key Connectors attend monthly Campaign Committee meeting.
- Our Promise Leaders United executives start to reach out to their account assignments.

AUGUST
- Key Connectors attend training regarding responsibilities and pledge forms.
- Key Connectors attend monthly Campaign Committee meeting.
- Key Connectors attend Our Promise statewide kickoff:
  
  Wednesday, August 28th | State Capitol | 11:00am-1:00pm

SEPTEMBER
- Our Promise Campaign officially begins on September 1st.
- Key Connectors attend monthly Campaign Committee meeting.

OCTOBER
- Key Connectors continue campaign plan into the final month.
- Key Connectors collect pledge forms and start auditing.
- Key Connectors attend monthly Campaign Committee meeting.

NOVEMBER
- Key Connectors recap with Campaign Committee on what worked and didn’t work.
- Key Connectors collect pledge forms.
HANDLING CASH & CHECKS

1. All checks must be made out to Our Promise. 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. Once 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.
GET IN TOUCH

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