GET IN TOUCH

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BEST PRACTICES

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.

www.OurPromiseCA.org
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
KEY CONNECTOR POSITION STATEMENT

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.

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.

<table>
<thead>
<tr>
<th>STACK</th>
<th>PLEDGE FORM</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>START A NEW ONGOING PAYROLL DEDUCTION</td>
</tr>
<tr>
<td>2</td>
<td>CHANGE A CURRENT PAYROLL DONATION</td>
</tr>
<tr>
<td>3</td>
<td>RETIRING? GIVE THROUGH CALPERS</td>
</tr>
<tr>
<td>4</td>
<td>ONE-TIME GIFT WITH CASH OR CHECK **Must be receipted and made out to OP.</td>
</tr>
<tr>
<td>5</td>
<td>MAKE NO CHANGES</td>
</tr>
<tr>
<td>6</td>
<td>CANCEL AN EXISTING PAYROLL DONATION</td>
</tr>
<tr>
<td>7</td>
<td>DECLINE PARTICIPATION</td>
</tr>
<tr>
<td>8</td>
<td>n/a Errors **It is very important that you do NOT submit forms with errors.</td>
</tr>
<tr>
<td>9</td>
<td>n/a Forms needing SSN’s / Any forms that have checkbox 1, 2, 3, 6</td>
</tr>
</tbody>
</table>

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.

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.
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:

☐ The donor’s full Social Security Number (SSN) is provided in Box A
  *See SSN requirements on back of pledge form.

☐ The monthly donation amount meets the campaigns $5 minimum monthly contribution amount.

☐ The donor provided a signature and date in Step 4 – Box 11.

☐ 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.

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
PLEASE COMPLETE THIS SECTION IF YOU SELECTED ACTION 1, 2, 3, OR 4 ABOVE.

**PLEASE PRINT LEGIBLY USING A BALL POINT PEN.**

**SIGNATURE REQUIRED (INK ONLY) DATE**

<table>
<thead>
<tr>
<th>SOCIAL SECURITY NUMBER</th>
<th>FULL NAME</th>
<th>LAST NAME</th>
<th>PHONE</th>
<th>EMAIL</th>
<th>PERSONAL EMAIL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

*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:**

- [ ] START A NEW ONGOING PAYROLL DONATION
- [ ] CHANGE YOUR CURRENT ONGOING PAYROLL DONATION
- [ ] RETIRING?
- [ ] MAKE A ONE-TIME GIFT WITH CASH OR CHECK
- [ ] MAKE NO CHANGES
- [ ] CANCEL YOUR EXISTING PAYROLL DONATION
- [ ] DECLINE PARTICIPATION

**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. To find specific nonprofits certified by the Our Promise campaign, along with their unique OP Code#, please reference the printed GuideStar.org or OurPromiseCA.org.

**REVIEW INFORMATION**

- [ ] RETIRING?
- [ ] MAKE NO CHANGES
- [ ] CANCEL YOUR EXISTING PAYROLL DONATION
- [ ] DECLINE PARTICIPATION

**WRITE IN YOUR FAVORITE NONPROFIT:**

- [ ] NONPROFIT NAME
- [ ] ADDRESS
- [ ] CITY/STATE/ZIP
- [ ] TEL (AS PRINTED ON PAY WARRANT)

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

**SIGN**

I authorize the State Controller to release my donation and uwcc to process my selected donations to my nonprofit(s) as indicated.

**CONTACT INFORMATION**

Please print legibly using a ball point pen.

- [ ] NAME
- [ ] HOME ADDRESS
- [ ] CITY/STATE/ZIP
- [ ] PHONE: ( )
- [ ] EMAIL

**SELECT ONE**

- [ ] START A NEW ONGOING PAYROLL DONATION
- [ ] CHANGE YOUR CURRENT ONGOING PAYROLL DONATION
- [ ] RETIRING?
- [ ] MAKE A ONE-TIME GIFT WITH CASH OR CHECK
- [ ] MAKE NO CHANGES
- [ ] CANCEL YOUR EXISTING PAYROLL DONATION
- [ ] DECLINE PARTICIPATION

**MAKE NO CHANGES**

Complete box A with full social security number, complete section 8, then sign and date below.

**SIGNATURE REQUIRED (INK ONLY) DATE**

Only pledge forms with action required need to be returned.

For more detailed information, visit OurPromiseCA.org.