2020 CFC Application Training: 
*How to Complete Listing Requirements*

Office of Combined Federal Campaign 
June 2020

2020 CFC Charity Listing Requirements:

Refer to this guide to complete your charity’s listing at http://CFCcharities.opm.gov
CONGRATULATIONS!

• Your organization’s application was approved! The hard part is over...but there are still requirements that you must complete
• To appear on the 2020 CFC Charity List, your organization must complete the listing requirements on or before Monday, July 27 by 11:59 pm, Eastern time

Congratulations!

Your organization’s application to participate in the 2020 Combined Federal Campaign (CFC) was approved! The hard part is over...but there are still requirements that you must complete before the campaign begins this Fall.

To appear on the 2020 CFC Charity List, your organization must complete listing requirements in the Charity Application System (https://CFCcharities.opm.gov/) on or before Monday, July 27 by 11:59 pm, Eastern time.
What are Listing Requirements?

There are four actions you need to take to complete your listing requirements:

1. Submit critical information potential donors will see in the 2020 CFC Charity List
2. Provide banking information for electronic funds transfer (EFT)
3. Pay the listing Fee
4. Verify/update your organization’s contact information
Ok, I’m ready! How do I get started?

To start your listing:

 Log in to CFCcharities.opm.gov (before July 27)
 Click on the ‘View’ icon next to your organization’s name

Ok, I’m ready! How do I get started?

To start your listing, please log in to https://CFCcharities.opm.gov/ (before July 27) and click on the ‘View’ icon next to your organization’s name. From here, we will go over the information that you need to provide.
Submit critical information potential donors will see in the 2020 CFC Charity List

Annually, there are thousands of charities in the campaign all looking to raise funds and/or recruit volunteers to assist their organizations through tough challenges. The information that you provide in your listing statement is what makes your organization stand out to get the attention of interested donors. Make it Count! There are nine pieces of information you can provide. Some are mandatory and others are optional.
Step One: Provide Listing Information

- Charities will appear in the list with their legal name
- May also be listed with their Doing Business As (DBA) name listed along with the legal name (documentation required)

Step One: Listing Name – Optional

Charities will appear on the CFC Charity List with the legal name of the organization, as recognized by the IRS. Organizations may also have their Doing Business As (DBA) name listed along with the legal name. If you submit a DBA, supporting documentation showing a state or municipal government has approved your DBA is required. For more information on the requirements of the DBA name usage, please refer to Step 6 of your CFC application.
Step One: Listing Statement – Mandatory

Your listing statement is so important! It is your opportunity to convince potential donors to choose your organization. You can share your mission statement, what activities or services you provide, your accomplishments...it’s up to you; however, you only have 256 characters (about 25 words) to make it happen. Maximize them!
Listing Statement: Example #1

Our organization, Melissa's Australian Shepherd Dog Rescue, Inc., was founded in 2001 in Manchester, New Hampshire by Melissa Duggan. Our organization places Australian Shepherds in forever homes with caring families so that they can thrive.

- The statement is 242 characters - mostly used for the name of the organization, location, and founder
- Your organization’s name will always be included – no need to repeat it
- The organization’s impact in the community was not shared
- Key words such as canine, stray, neuter, foster, adopt, veterinary, or shelter were not included in the statement

That’s a missed opportunity!

Listing Statement – Example

Let’s take look at an example from a fictitious Australian Shepherd rescue organization:

“Our organization, Melissa’s Australian Shepherd Dog Rescue, Inc., was founded in 2001 in Manchester, New Hampshire by Melissa Duggan. Our organization places Australian Shepherds in forever homes with caring families so that they can thrive.”

That is 242 characters. Most of the characters were used by stating the name of the organization and location, who founded the organization and when. Your organization’s name will always be included in its charity listing – no need to repeat it in the listing statement when you are limited in the number of characters that you can use.

The statement is not terrible but the organization’s impact in the community was not shared. Your organization’s impact is important, and donors want to read about it!

It also misses the opportunity to include key words that could be used in a search by a donor interested in giving to a dog rescue; words such as canine, stray, neuter, foster, adopt, veterinary, or shelter were not included in the statement. That’s a missed opportunity!
Listing Statement: Example #2

Annually, we place over 100 stray Australian Shepherds with foster families so they can heal prior to adoption. Your donation provides the shelter with funds to offer free canine veterinary and neutering services free of charge to caring families.

- This statement is 248 characters and it describes the organization’s impact and services.
- It incorporates many key words to maximize the organization’s chances of coming up in search results.
- Use the listing statement as an opportunity to sell your organization to donors!

Listing Statement – Better Example

Now let’s look at the revised listing statement for the same organization:

“Annually, we place over 100 stray Australian Shepherds with foster families so they can heal prior to adoption. Your donation provides the shelter with funds to offer free canine veterinary and neutering services free of charge to caring families.”

This statement is 248 characters and it describes the impact the organization has each year and the services it provides to the community. In addition, it incorporates many of the key words that were omitted from the prior statement to maximize the organization’s chances of coming up in search results. Use the listing statement as an opportunity to sell your organization to donors!
Listing Statement Tips

Focus on key words donors might use to search the online database. While you might be proud of your organization's history, such as who founded the organization or in what year, it’s not likely that donors will use those words or dates to find you. Don’t use up some of your precious character count on information that will not help donors find your organization or convince them to give to you.
Step One: Phone Number – Mandatory

Each organization in the Charity List is required to have a dedicated number that donors can use to reach someone to get more information about your charity. A number must be provided - make sure it’s correct! You don’t want to miss out on calls from potential donors!
Step One: Administrative Fundraising Rate (AFR) – Mandatory

The AFR is calculated by taking the total organization’s revenue and dividing it by the management and general and fundraising expenses reported on IRS Form 990 or pro forma IRS Form 990. The calculated percentage translates to your organization’s overhead rate. During the listing period is the time to verify that the AFR is correct. After the listing period has closed, incorrect AFRs cannot be changed.
Step One: Category Codes – Mandatory

Taxonomy, or NTEE, Codes categorize the types of services that most charitable organizations offer. Your organization can submit up to three codes. If a code is not selected, OPM will assign the category “Z” for Unknown. Some donors search for charities using taxonomy codes.
Category Codes – Example

For instance, let’s go back to our previous charity, Melissa’s Australian Shepherd Dog Rescue, Inc. This organization might select “D” for Animal Related and “W” for Public & Societal Benefit. It has given itself two opportunities to be found by donors who search by this option. It is unlikely that a donor would search for charities using the “Z” code. It is to your benefit to select at least one code that best describes the services that your organization offers.
Step One: Charity Logo

- Each organization can be listed in the **online** charity listing with a logo to get the attention of donors
- The size is limited to less than 500kb and is in png, jpg, or jpeg format.

**Step One: Charity Logo – Optional**

Each organization can be listed in the online charity listing with a logo. Though it is optional, why not include an eye-catching logo that gets the attention of donors? Just make sure that the size is less than 500kb and is in png, jpg, or jpeg format.
Step One: Volunteer Information

CFC charities can also accept pledges of volunteer hours

- Donors who volunteer often pledge a higher monetary gift
- Organizations that accept volunteer time from donors with a special hand-shaped icon

Step One: Volunteer Information – Optional

Did you know that CFC charities can accept pledges of volunteer hours? Research shows that donors who volunteer often also pledge a higher monetary gift. The CFC Charity List identifies organizations that are able to accept volunteer time from donors with a special hand-shaped icon.
Volunteer Information

• Three volunteer-related questions:
  ➢ Does your organization provide volunteer opportunities?
  ➢ Does your organization want to solicit volunteer time from federal employees?
  ➢ If so, provide the estimated monetary value to your organization per hour of volunteer time. (This is required if you accept volunteer pledges.)
• Volunteer coordination occurs outside of the CFC Pledging System
• Once the CFC Charity List is final, you will not be able to add your organization to the volunteer list

Volunteer Information

During the listing process, there are three volunteer-related questions you will have to answer:

• Does your organization provide volunteer opportunities?
• Does your organization want to solicit volunteer time from federal employees?
• If so, provide the estimated monetary value to your organization per hour of volunteer time. (This is required if you accept volunteer pledges.)

Coordination of specific volunteer opportunities and fulfillment of volunteer pledges will occur outside of the CFC Donor Pledging System between the donor and the organizations to which volunteer time is pledged. This is only time you can express your interest in recruiting volunteers throughout the next year. Once the CFC Charity List is final, you will not be able to add your organization to the volunteer list.
Step One: C.A.R.E. Statement

A CFC Automated Response Element (C.A.R.E.) Statement is shared on-screen when donors pledge via the CFC Pledging System.

It’s an opportunity to:

- Thank donors
- Describe how you will use donations
- Provide the Volunteer Coordinator’s contact information

You have 1,000 characters to make the magic happen!

Step One: C.A.R.E. Statement — Optional

A CFC Automated Response Element (C.A.R.E.) statement is a thank-you message shared on-screen immediately with donors who make designations to your organization via the CFC online pledge portal. It’s also an opportunity to let your donors know how you intend to use their contributions.

If your organization is accepting volunteer pledges, then the C.A.R.E. statement is a perfect opportunity to thank volunteers for pledging volunteer hours and to communicate the contact information for your charity’s Volunteer Coordinator.

You have 1,000 characters to make the magic happen!
C.A.R.E. Statement: Do

- Immediately thank your donors for giving through the CFC
- Thank donors pledging volunteer hours and provide the contact information for your charity’s Volunteer Coordinator
- Describe the organization’s recent accomplishments
- Describe how donor contributions will be used
- Have the statement come from someone in a leadership position
- Make the statement specific to the current year – avoid using the same message year after year

C.A.R.E. Statement

DO:
- Immediately thank your donors for giving through the CFC
- Thank donors pledging volunteer hours and provide the contact information for your charity’s Volunteer Coordinator
- Describe the organization’s recent accomplishments
- Describe how donor contributions will be used with specific examples like the Impact Statements – “your $100 gift will supply 5 emergency tents to a family in need”
- Have the statement come from someone in a leadership position (e.g. CEO, Executive Director, Board Chair, etc.)
- Make the statement specific to the current year – avoid using the same message year after year
C.A.R.E. Statement: Do Not

☒ Solicit additional donations or encourage donors to give outside of the CFC
☒ Request donor information
☒ Include your website address
☒ Include electronic signatures, photos, videos, or any hyperlinks

C.A.R.E. Statement

DO NOT:
• Solicit additional donations or encourage donors to give outside of the CFC
• Request donor information
• Include your website address
• Include electronic signatures, photos, videos, or any hyperlinks
Step Two: Provide Banking Information

- This is how the Central Campaign Administrator (CCA) distributes collected pledges to your charity throughout the year
  - Electronic funds transfer (EFT) is the only option to transmit funds
  - Be sure the banking information you provide is correct

Step Two: Provide bank information – Mandatory

We are finished talking about the information you provide for your listing, but this second step is one you definitely don't want to miss! This is how the Central Campaign Administrator (CCA) distributes collected pledges to your charity throughout the year. Electronic funds transfer (EFT) is the only option to transmit funds – paper checks will not be mailed. So be sure the banking information you provide is correct.
Step Three: Pay the Listing Fee

- The Listing Fee is different than the fee paid at the time of application
- Listing fees are only paid by approved organizations
- The funds are used to promote and market the campaign.
- The CCA will not accept any gifts for organizations that do not pay the Listing Fee by the deadline (July 27)

Step Three: Pay your Listing Fee – Mandatory

The Listing Fee is different than the application fee that your organization paid at the time that it submitted its 2020 CFC application. The application fee covered the cost of processing your application. Listing Fees are only paid by organizations that are approved to participate in the campaign and the funds are used to promote and market the campaign.

All approved organizations must pay the Listing Fee to appear in the 2020 CFC Charity List and be eligible to receive monetary and volunteer pledges during the solicitation period. The Central Campaign Administrator will not accept any gifts for organizations that do not pay the Listing Fee by the deadline. OPM will not waive this fee nor accept late payments. July 27 is the date to remember!
How Much are Listing Fees?

How much are the Listing Fees?

OPM determines Listing Fees annually, based on a tiered approach. Tiers refer to the size of organizations in terms of total revenue, as reported on IRS Form 990, or pro forma IRS Form 990, submitted with the CFC application.

- Tier I Nat'l/Int'l Organizations and Local Organizations are those that report $1 million or more in revenue.
- Tier II Nat'l/Int'l Organizations and Local Organizations are those that report $250 thousand or more in revenue, but less than $1 million.
- Tier III Nat'l/Int'l Organizations and Local Organizations - Tier III organizations are those that report less than $250 thousand in revenue.

For the 2020 campaign the Listing Fees are:
- Tier I Nat'l/Int'l Organizations: $1,930
- Tier II Nat'l/Int'l Organizations: $554
- Tier III Nat'l/Int'l Organizations: $328
- Tier I Local Organizations: $673
- Tier II Local Organizations: $114
- Tier III Local Organizations: $15
Step Four: Verify Contact Information

• Email notifications are the primary way that OPM, CCA, and Outreach Coordinators will contact you throughout the year for:
  ➢ Campaign-related information
  ➢ Opportunities to submit videos and success stories for Virtual Charity Fairs
  ➢ Invitations to attend charity events at federal, military, and postal duty locations

   Excellent way to market yourself and inspire valuable monetary and volunteer donations

Step Four: Verify your organization’s contact information – Mandatory

The CFC will use the email information you provide to contact you throughout the year, including asking for your video and success story for the Virtual Charity Fair and to recruit you to participate in charity events at Federal agencies, military installations, and postal offices. Getting in front of donors to let them know of the great work that your organization does is the best way to market yourself and to get valuable monetary and volunteer donations.
Contact Information – Suggestions

We strongly suggest providing more than one point of contact. Please ensure all the email addresses you provide are correct and separated by semicolons and not colons or commas. This is something you can come back to and update throughout the year. The Charity Application System will allow you to enter as many contacts as you want so that your organization does not miss out on important communication from OPM or your local campaign Outreach Coordinators. Just make sure that the email addresses entered are correct and separated as instructed.
What’s Next?

- The 2020 Listing deadline is Monday, July 27, 11:59 pm, Eastern time!
- OPM will not accept late entries or payments
- Complete your organization’s listing early

What’s next?

That covers all the requirements for listing. Remember the 2020 deadline to complete listing requirements is Monday, July 27 by 11:59 pm, Eastern time! This is a hard deadline and OPM will not accept late entries or payments.
Contact Information

If you have any technical difficulties with completing listing requirements, please contact Customer Care at:
1-888-232-4935 and for TTY 1-800-203-8280. You can also reach Customer Care via email at support@cfccharities.org.

Don’t wait until the last minute to complete your organization’s listing though. Customer Care is open from 8:00 am – 6:00 pm, Central Standard Time, Monday through Friday.

Please don’t hesitate to reach out to us.

Best wishes for a successful campaign!