



GUIDELINES FOR THE USE OF E-TECHNOLOGY IN THE CFC

Introduction:

These guidelines are designed to assist CFC campaigns in the creation and maintenance of electronic technologies, in a manner that is consistent with the CFC regulations and practices.¹ E-technologies are defined as any product, device or mechanism that creates and disseminates information about the CFC or facilitates transactions for the CFC by means of the world wide web, inter and intranets, e-mail, machine-readable and scanned information, hand-held and desk-top electronic devices and any other electronic means.²

Electronic technologies associated with the CFC should be designed and utilized to achieve two principal objectives of the campaign. The first is to enable donors and charities to easily access information and participate in the CFC at a lower cost. The second is to allow PCFOs and LFCCs to communicate more efficiently with donors, Federal agency volunteers, and charities.

Guidelines Summary

1. Uphold the CFC principle of fairness as described in 5 CFR 950.105(b) in all e-technology products;
2. Meet the core content requirements for CFC websites;
3. Adhere to the specified e-technology conventions;
4. Practice e-technology management guidelines; and,
5. Employ sound technical and fiscal practices in the electronic dissemination of campaign information.

¹ CFC regulations and guidance address paper dissemination products, such as pledge cards, brochures or charity lists and most machine-readable material.

² The E-technologies term is adapted from OMB Circular No. A-130, Management of Federal Information Resources, Item 6 (j) and 6 (k).

GUIDELINES FOR E-TECHNOLOGY USE IN THE CFC

Guideline 1.

CFC e-technology products must conform to the principle of fairness as described in Title 5 of the Code of Federal Regulations (CFR) §950.105(b), and must avoid exclusive, differential, or preferential treatment to any one participating charity or group of charities. This principle applies to website Internet Service Providers (ISPs) and other electronic hosting arrangements.

1.1 Hosting and Domain Names

1.1(A) CFC websites may be hosted on a PCFO server or any governmental or non-governmental server, provided that the identifying URL or domain name does not contain descriptors or content that identifies the PCFO or any other non-governmental organization or business.

1.1(B) Domain names or URLs that identify the PCFO or other non-governmental hosting providers are not acceptable. Examples of unacceptable domain names are:

www.pcfoname.city.org/cfc
http://www.pcfoname.state/cfc
www.pcfoname.org/cfc

1.1 (C) Domain names should identify the campaign location. Examples of acceptable domain names that do not display PCFO or non-governmental provider descriptors are:

www.cfcyourtown.org
http://www.cfcstate.org
www.countycfc.org

1.1(D) Domain names can be purchased directly at various prices and terms on the internet. Search for “purchase domain names” to research options. If a domain name is offered as part of a package of services by a vendor, be certain that the name can be retained in the event the service provider changes.

1.2 Charity Information, Stories, and Volunteer Opportunities

1.2 (A) Website references that list charities or groups of charities in ways other than required by the CFC regulations are considered equivalent to the electronic distribution of charity literature and have the potential for providing preferential treatment to a charity or group of charities. Charity references must conform to CFC regulations as stated in 5 CFR §§ 950.105(b) and 950.401(d), respectively. Therefore, it is not acceptable to list or post charity names, links, stories, events, and volunteer opportunities on any portion of the CFC website except as provided for in the CFC regulations and these Guidelines at 3.1. Referring website visitors to non-governmental sources that offer charity and volunteer information is also unacceptable.

1.2 (B) Examples of the importance of the donors' contributions of time and money may be used when that information is presented without identifying charities. Website visitors seeking further information should be directed to the complete charity list so that they may directly contact the organizations of their choice. Opportunities to volunteer in the CFC, by definition do not represent the interests of any single charity or group of charities, and may be offered on the CFC website. Also, see Section 2.3, Campaign Event Information.

1.3 Charities and donors must be offered efficient, complete, and equal access to information.

Guideline 2.

CFC websites must meet the minimum core requirements that define home page content, key content, and campaign event information as listed below.

2.1 Home Page Content

2.1 (A) The local CFC website homepage must prominently display the two statements below that identify it as an official local CFC website as approved by the LFCC:

Statement 1

This is the official Combined Federal Campaign website for the [Your- Town] CFC .

Statement 2

This site has been reviewed and approved by the [Your-Town] Local Federal Coordinating Committee for the [2006] CFC campaign.

Hyperlinks, shown as underlined text above, must take the user to a listing of LFCC members and a description of the LFCC's role. LFCC member names and their Federal agency affiliations must be included. An LFCC e-mail address for contact is also encouraged. Any additional contact information for LFCC members is at the discretion of the LFCC.

2.1 (B) Feedback and comment links must be displayed to provide interested parties with the opportunity to send general questions regarding the campaign. General questions should link to the PCFO and technical questions regarding the website should link to the webmaster in accordance with the operating structure of the campaign. These links must be on the home page but may also appear in footers or in other conspicuous locations.

2.2 Key Content

Key content refers to information about the campaign that is considered essential for donors and other interested parties, such as the CFC charity lists, the pledge form, and local charity applications. Key content must be easily accessible.

2.2 (A) CFC charity list. The full contents of the local, national and international CFC charity lists must be available and conform to the CFC order of presentation of charities provided by OPM. Access to on-line CFC charity lists does not completely replace the need for paper CFC brochures. Campaigns may reduce the number of hardcopy brochures printed but still must print an adequate number of brochures and distribute them to donors.

1. CFC charity lists should be posted in write-protected PDF or other locked formats to deter their modification. This does not preclude the simultaneous use of HTML. Care should be taken when possible to produce a write protected file from an original document and not a scanned version. Doing so will help meet Section 508 accessibility requirements for users with disabilities.
2. CFC charity lists must be compliant with the 508 Accessibility requirements or alternately provide the charity list information in other formats that are accessible to users with disabilities.
3. CFC charity lists should be searchable. Search results must be displayed in the order that they would appear in the paper brochure except when the structure of the search, such as by charity code, is used. It is permissible to present search results by a relevance score according to the degree to which charities meet search criteria, as long as all charities in the group that meet the criteria are presented within the brochure order. For example, if a donor searches for charities with National Taxonomy of Exempt Entities (NTEE) service code "B" and the word "animal" in the description, it is allowable to display first those that match both criteria in the order they appear in the brochure, followed by all charities that match only one of the criteria (also in brochure order).
4. Charity list taxonomy. Effective for the 2006 campaign period, all on-line CFC charity list search engines must use the NTEE service category codes as first provided for by OPM in the 2006 CFC charity application or subsequent guidance.
5. Information on how donors may request a paper version of the local, national and international CFC charity lists must be available in relevant sections of the on-line charity lists.
6. Links to the National/International charity lists posted on the OPM/CFC website are not permissible as a substitute for the complete listing of local, national, and international charities.

2.2 (B) Pledge form. Pledge forms and instructions must meet the specifications of the model pledge form issued by OPM unless OPM has approved modifications in advance. Pledge forms must contain the campaign control number, campaign name and address, and must be produced in write-protected PDF or other tamper-resistant format. The on-line posting of the pledge form must also include clear instructions to the donor to select only from the charities listed

in their on-line or paper CFC charity list. Pledge form dimensions and recognition award levels are at the discretion of the local campaign and do not require OPM approval.

2.2 (C) Charity Applications. Local charity applications and deadlines for submission should be posted on the local CFC website along with links to the relevant guidance from the OPM/CFC website.

2.3 Campaign Event Information

CFC websites should post benchmark events and activities such as campaign-wide kick-offs and closings, requests for PCFO proposals, charity application deadlines, and activities for Federal agency volunteers. Campaigns are not required to post every event but should, at a minimum, direct the user to telephone and email contacts for further information. Additional campaign event information can include speaker's bureau opportunities, trainings, and other activities related to the administration of the campaign.

Guideline 3.

A CFC website must adhere to the following guidelines concerning the use of links, logos, advertising, sponsorship, and disclosures.

3.1 Links

3.1 (A) CFC websites must not link to other websites that do not relate to the mission of the campaign. This includes CFC sponsor websites.

3.1 (B) The CFC website may provide a link to the website of a participating charity, including the PCFO, as a part of its contact information in the official list of CFC participating charities.

3.1 (C) A PCFO may not provide a link to its own website in addition to a link authorized at 3.1(B), except when the PCFO is also the provider of an on-line processing service that is offered by that particular campaign. In that instance, the PCFO should be identified in that capacity through a simple disclosure statement and a link that makes the context clear.

3.1 (D) CFC websites must not link to businesses, charitable organizations, and others that donate goods or services to the CFC.

3.1 (E) The CFC website must link to the OPM/CFC website. Viewers must be directed to www.opm.gov/cfc unless otherwise instructed by OPM. Links to the National/International Charity lists posted on the OPM/CFC website are not permissible as a substitute for the complete listing of local, national, and international charities as required in Section 2.2 (A)6.

3.2 Logos.

Appropriate symbols for a CFC website are a CFC logo, local campaign theme emblems and logos, and government agency logos. The use of charity logos including the PCFO's non-CFC logo, symbols, and other branding elements related to non-profit and corporate entities are not appropriate on the CFC website.

3.3 Sponsorships

The involvement of sponsors in activities that help offset campaign expenses is common in the CFC and can be beneficial, provided sponsorships are not used to seek influence over the government process or to promote a particular legislative agenda. Sponsor acknowledgments on CFC websites must meet the following criteria to ensure that no endorsement is being provided to the sponsor:

3.3 (A) Acknowledgement of a CFC sponsor is acceptable when placed in a single line on an acknowledgement page of the website. The sponsor acknowledgement page, if any, must be devoted exclusively to acknowledging sponsors. It must be placed on the website in an unobtrusive place and visitors may only have access to the page after one or more clicks. Under no circumstances may visitor traffic be driven to the sponsorship page. CFC sponsor acknowledgements may not be placed elsewhere on the CFC website.

3.3 (B) A sponsor acknowledgement page must include a prominent disclaimer statement that it is solely an acknowledgement of the sponsor's support of the CFC and that it does not endorse any of the sponsor's products or services.

3.3 (C) A sponsor acknowledgement page must be devoid of sponsor logos, symbols, animations, and trademarks, and must be formatted in a manner that is consistent with the overall style sheet for the local CFC website. A sponsor acknowledgement must not exceed a single line of text.

3.3 (D) Links to a sponsor website are forbidden.

Contact the Office of CFC Operations for additional guidance on acknowledging sponsors in non-electronic formats.

3.4 Advertisements

The use of campaign sponsor advertisements can give the appearance of influence towards the federal workforce and are specifically prohibited. *Contact the Office of CFC Operations for additional guidance on acknowledging sponsors in non-electronic formats.*

3.5 Privacy Policy and Other Disclosures

At a minimum, CFC websites must provide a disclaimer of non-endorsement and non-responsibility for the content of any other sites that may be referenced and include a privacy policy statement. A privacy policy will explain how information is collected and used on the website. The OPM privacy policy located at <http://www.opm.gov/html/privacy.asp> may be used as model.

3.6 Cookies

Persistent cookies are not acceptable and must not be used.

Guideline 4

The Local Federal Coordinating Committee (LFCC) must adopt a policy for the approval of electronic information products that is consistent with CFC Regulations.

4.1 Ownership

CFC electronic data (donor and campaign information) are the property of the LFCC. Ownership of software and hardware used to produce campaign information is determined by the terms of purchase or contract for such tools.

4.2 Reviews

4.2 (A) Consistent with other campaign materials, CFC electronic information products must be reviewed annually by the LFCC and its approval noted. On CFC websites, this must be displayed on the home page as described in Guideline 2.1 (A).

4.2 (B) Federations and agencies should be given the same opportunity to offer suggestions regarding on-line charity lists that they are given to review the paper CFC charity list as provided for in 5 CFR § 950.105(b).

4.3 Record Keeping

Electronic information products must be retained for three campaign years in accordance with 5 CFR § 950.604. For CFC websites, an annual record of the key content pages (CFC charity lists, pledge form and charity applications) should be captured and stored in electronic and/or paper formats. The complete website may be stored at the LFCC's discretion.

Guideline 5. Electronic Transmission of Campaign Information

Campaigns using e-technologies to transmit donor information must protect donor privacy and security through sound technical and fiscal practices.

5.1 On-Line Transactions

5.1 (A) Campaigns may, but are not required to, include the opportunity for on-line giving through the CFC. If a campaign's website does include this opportunity, the campaign must:

1. Conduct on-line transactions with products and systems that employ high-level, security technology that protects the privacy and security of the donor's personal information.
2. Provide an 'opt out' mechanism so that donors must consciously make selections to proceed with aspects of the transaction and transmittal of donor information.
3. Disclose the identity of the organization or provider processing an on-line transaction. Also, see Section 3.1.
4. Insure that contributions from on-line transactions are expedited as set forth in CFC regulations.

5.1 (B) The nature of the relationship between the organization(s) processing the pledge and the charity intended to benefit from the pledge must be disclosed, for example, "Financial transactions on this website are processed by Your Firm. Your Firm is independent of and has no relationships with any of the organizations eligible to receive funding in this program." or "Financial transactions on this website are processed by Your Firm. Your Firm is a division of Charity XYZ."

5.1 (C) Viewer access to CFC information and transactions must only pass through CFC branded portals, sites, links, gateways, and any other points of direct or indirect access to CFC business. Federal government intranet sites are acceptable for CFC information and transactions, provided that the viewer is not directed through a commercial or charity branded site.

5.1 (D) Companies providing on-line services to campaigns should provide clear and full communication with the campaign on all aspects of donor transactions including the accurate and timely transmission of data related to those transactions.

5.2 e-Giving and e-Pledging

5.2 (A) Campaigns may not initiate electronic pledge processing procedures or arrangements with Federal payroll offices.

5.2 (B) The conventional method of giving through the use of paper pledge forms must be available for donors who prefer this option.

5.2 (C) All initiatives, products and programs must be approved by the LFCC before implementation.

5.3 Electronic Pledge Reports. Transmitting donor pledge information to designated charities by electronic means is acceptable when:

5.3 (A) The donor's information is in a secure environment.

5.3 (B) Only that information allowed for in the regulations is made available, at the donor's request, as required by the CFC Regulations in §950.601(c) and §950.601(d).

5.3 (C) The cost of a product or service is included in the budget for administering the campaign.

5.3 (D) Provision of this information remains available in paper format.

5.3 (E) The process, product, or system used for the dissemination of pledge information has been approved by the LFCC.

5.3 (F) All electronic on-line products for the dissemination of pledge information must conform to all other applicable parts of CFC regulations and these guidelines, and must be approved by the LFCC before implementation.