



FY20 Community Connections Campaign (CCC)

November 4 to December 19, 2019

Frequently Asked Questions (FAQs) for World Bank Group (WBG) Retirees

General Background

Why are we moving to a new CCC platform? The former CCC system was built just for headquarters almost 20 years ago and could not allow everyone around the world to participate. In addition, even at headquarters, retirees, staff and consultants have requested additional methods of giving.

What are the main new features of the Benevity-based system? After almost two years of vetting possible solutions, the WBG is moving to a new, more inclusive CCC platform for what has grown to be a global giving campaign. The new platform will allow every staff member, consultant and retiree worldwide to be included in the CCC program. It also will allow for giving by credit card and PayPal.

Any other big items that are new? Doubling of all gifts by the WBG will now start on Day 1 of the campaign.

What if I have more questions? The CCC Benevity pledge site has FAQs for specific donor types, including for: (1) Retirees, (2) Country Office Staff and Consultants new to the CCC, (3) Country Office Staff and Consultants with local campaigns, and (4) HQ Staff and Consultants.

What are the dates of the FY20 CCC? Monday, November 4, 2019 through Thursday, December 19, 2019

Key Changes For Retirees

With the new more inclusive CCC, what are the most significant improvements for retirees?

Retirees will now be able to give using credit cards or PayPal. In addition, doubling of all gifts with the WBG corporate match will start on Day One!

Are there other especially notable changes for retirees?

If a retiree still wants to give by check, stock or donor-advised fund, they should start their pledging very early as there is now an extra step involved in requesting the corporate match.

More details on how to pledge and make payments are provided in the attached FAQs for retirees.



1. **How can a WBG retiree access the new Benevity-based CCC pledging platform?**

In anticipation of the November 4 CCC launch, an email from noreply@benevity.org was sent on October 31/November 1 to the email addresses we have. It went to past FY19 CCC retiree donors as well as to any 1818 Society members who have disclosed their email addresses. It describes how to log into the new pledging system – including website address, user name (9-digit UPI), and temporary password. Once logged in, you should update the initial password to one that you can remember by going to Settings in My Profile on your personal Dashboard. Do not reply directly to the launch email.

If you did not receive the launch email: Copy/paste this link into your browser and input and submit your contact information: <https://fs17.formsite.com/uXQB4R/FY20CCC/index.html>
You should then receive your launch email within a few days' time.

2. **How do I make my CCC pledge in the new system?**

The CCC Benevity pledge site has all the information you need to make your pledge. You are encouraged to explore its wealth of giving information and ideas before pledging. Your personal Dashboard appears when you first log onto the pledging system. There is a “How to Pledge” video on the Dashboard – next to the +Donate Now button. If you prefer, here are the step-by-step instructions for pledging:

- a. To start your pledge, search for your preferred organization in either the I Care About... or the Find A Cause fields.
- b. Select an organization by clicking the red **+Donate Now** button. You will then be prompted to input your Donation Amount, Donation Frequency (one-time or recurring on a monthly basis), and preferred Payment Method (credit card or PayPal). The Estimated Match will appear automatically.
- c. Next, click the Confirm Donation button, which will take you to a pledge summary page. If correct, click the Submit button, which will take you to your pledge payment page.
- d. Input your payment information, and finally, the last very important step, click the Submit Your Donation button to complete your pledge for that organization. The amount donated and matched should now show in My Profile on your Dashboard.

Please note that you will need to perform all of these steps for EACH of your selected organizations' pledges. Also, please note that there is an extra step involved in making an “external donation.” (See FAQ #10 below for more information about external donations pledges.)

Your total FY20 CCC pledge details will be automatically calculated and updated in your Profile on the Dashboard. You may return to your Dashboard as many times as you like to add to your CCC gifts with additional organizations.

3. **How do I search for specific CCC organizations? Where can I find the list of the FY20 eligible CCC organizations?**

The “How to Pledge” video does a great job of showing how to search for CCC organizations. You can search for specific organizations – known as “causes” in Benevity-speak – or you can explore specific focus areas in the I Care About... or Find a Cause fields. You can also click the +Donate Now button and then search by topic area.

The [lists of FY20 CCC organizations](#) are posted in the [Explore](#) section – for both headquarters and country offices – along with other useful information about, e.g., the CCC general fund, CCC organization criteria, FAQs, and more.

4. *Is there a limit on the number of CCC organizations that I can designate?*

No. An exciting new benefit of the Benevity CCC pledging system is that you can [support as many CCC organizations as you would like](#). (In the past, donors could only support 10 organizations.)

5. *Which methods of CCC pledge payments are available to retirees?*

Another exciting new benefit of the Benevity CCC pledging system is that any donor – including retirees – can now make CCC pledge payments via [credit card](#) and [PayPal](#) to their selected organizations. Such pledges will automatically be matched by the WBG (for those organizations that are eligible for a matching contribution). Payments can be made on a one-time only or on a recurring monthly basis. (See FAQ #8 below for more information about recurrent payments.)

Donors – including retirees – can also still pay their pledges via a [personal check](#) or a check from your [personal charitable trust](#) or other [personal donor-advised-fund \(DAF\)](#). And you can still make donations of [personally held stocks and bonds](#). These kinds of donations are considered to be “external donations.” (See FAQ #10 for more information about pledging via external donations.)

6. *How much is the WBG corporate match for the FY20 CCC? Are retirees’ CCC pledges still eligible for the corporate match? How do I request a corporate match?*

Yes, retirees’ CCC pledges are still eligible for the WBG corporate matching contribution. The corporate match for the FY20 CCC is [100% -- from day one!](#) Thus, donors will double their donations to their favorite organizations through the CCC – for those organizations that are eligible to be matched. Organizations that are tagged with a green **Matching Offer** banner are eligible for the WBG corporate match. Organizations that are new to the CCC list for FY20 are not yet eligible for a corporate matching contribution.

The WBG corporate match will automatically be calculated and applied for all eligible organizations for pledges made via credit card and PayPal, up to the donor’s maximum limit. [For external donations, the corporate match must be requested separately](#). (See FAQ #10 for more details about requesting a corporate match.)

7. *Is there a limit on my total CCC pledge and/or corporate match requests for the FY20 CCC?*

While with the new platform, there is now no limit on how much you can pledge to CCC organizations, for the FY20 CCC, the [WBG has capped the corporate match at \\$25,000 per donor](#).

8. ***Can I opt for recurring payments from my credit card or PayPal accounts? Will future recurrent payments be eligible for a WBG corporate matching contribution?***

Yes, you can spread out your pledge payments by opting for recurring charges to your credit card and PayPal accounts on a monthly basis. Please note, however, that only recurring payments that happen in the campaign months of November and December 2019 will be matched by the WBG – and only up to the maximum limit of \$25,000 per donor. Recurring payments that happen in January to October 2020 will NOT be matched -- but they will still go through the system to your intended organization(s).

Please also note that you will be responsible for stopping future recurring payments, which will continue monthly in perpetuity until you go back into your CCC pledge and turn them off.

9. ***If pledging via credit card or PayPal, will a transaction fee be applied? If so, how will that be handled – i.e., who will cover that cost?***

Transactions fees will be deducted automatically from your pledge by Benevity to cover the charging agency's (credit card company or PayPal) merchant fees before going to the organization. These costs are on average around 2.5%.

10. ***What are “external donations?” Are they eligible for the corporate match? How can I arrange a request for the corporate match for such donations?***

The new CCC Benevity system still allows for pledges made via personal checks or personal donor-advised-fund (DAF) or charitable trust checks – as well as via personally held stocks and bonds donations. These kinds of pledges are considered, however, to be “external donations” because they are made outside the CCC pledge system directly to the organizations themselves. Unlike for previous CCCs, such donations go directly to the CCC organizations you choose, not via WBCCF. We must therefore receive proof that the donations have been made, and that they have happened during the FY20 campaign period – i.e., between November 4 and December 19, 2019. Because arranging and receiving receipts/acknowledgements of donations might take you some time, it is HIGHLY recommended that you start your external donation AS EARLY AS POSSIBLE. Proofs of such donations must be uploaded to the CCC Benevity site by December 19 latest. (See FAQ #11 below about this deadline.)

You will then need to request a WBG matching contribution separately for these kinds of external donations; they are not automatically applied in the system. Requesting the corporate match is actually quite simple! The following provides information about this extra step to arrange corporate match requests for pledge payments made via each of these methods:

a. ***How can I make my CCC pledge payment via a personal check?***

Please first make your donation via personal check directly to your CCC organization of choice. You should then receive a tax receipt or other acknowledgement of your donation directly from the organization. Next, to request a corporate match for this donation, locate the particular organization in the CCC Benevity site (see FAQ #3 above for how to search for an organization). Click on the organization's name, and on its profile page, click on the green **+Request Match** button. Complete the remainder of the

form, and upload your donation receipt from the organization. Finally, click the [Submit Your Donation](#) button, which will place your match request form in a queue for approval by the CCC administrator. Please note that the name on the receipt must match your name. If approved, your requested match will be disbursed directly to the organization beginning on the 21st of the month following its approval.

b. *How can I make my CCC pledge payment from my donor-advised-fund (DAF) or charitable trust?*

First, please follow whatever procedures are required for charitable donations to nonprofit organizations by your personal DAF or charitable trust. You will thus receive receipts or other acknowledgements of donations from the organizations themselves and/or from your DAF or charitable trust. To request a corporate match, first locate the organization in the CCC Benevity site (see FAQ #3 for how to search for an organization). Click on the organization's name, and on its profile page, click on the green **+Request Match** button. Complete the remainder of the form, and upload your donation acknowledgement and/or receipt from your DAF/charitable trust and/or the organization itself. Finally, click the [Submit Your Donation](#) button, which will place your match request form in the queue for approval by the CCC administrator. Please note that the name on the DAF/charitable trust and/or organization receipt must match your name. If approved, your requested match will be disbursed directly to the organization beginning on the 21st of the month following its approval.

c. *How can I donate my personal stocks to my designated CCC organization(s)?*

Please follow whatever procedures your brokerage firm requires to make gifts to charitable organizations via your personally held stocks or bonds. Your broker will be able to advise you on the procedures. When donating shares of stocks or bonds directly to an organization, your broker will need to know, e.g., the brokerage account details for the organization to which you wish to transfer your stocks. You may wish instead to sell your stocks/bonds and arrange for the sales proceeds to be gifted to the organization.

Regardless of which scenario, you should obtain from the recipient organization and/or your broker (a) proof of your stocks/bonds donation which indicates the value of the stocks/bonds on the date transferred; or (b) proof of the final value of the donated stocks/bonds sales proceeds on the date sold and then donated. Then, requesting a corresponding corporate match is simple. First, locate the organization in the CCC Benevity site (see FAQ #3 above for how to search for an organization). Click on the organization's name, and on its profile page, click on the green **+Request Match** button. Complete the remainder of the form and upload your donation acknowledgement and/or receipt from your brokerage firm and/or the CCC organization itself. Please note that the name on the receipt must match your name. Finally, click the [Submit Your Donation](#) button, which will place your match request form in the queue for approval by the CCC administrator. If approved, your requested match will be disbursed directly to the organization beginning on the 21st of the month following its approval.

11. *What will happen if my proofs of external donation do not get arranged by the end of the campaign (December 19)?*

If a proof of external donation has not been uploaded by December 19, the donation will unfortunately NOT be eligible for a corresponding corporate matching contribution.

12. ***Can retirees nominate organizations to be considered for the CCC list?***

Retirees are welcome and encouraged to nominate organizations to be considered for the CCC list; however, the list for the FY20 CCC is already closed. If you wish to nominate an organization for the next FY21 CCC, please see CCC Organization Criteria and Nominations Process under Quick Links on the CCC Benevity Dashboard.

13. ***Can retirees' spouses participate in the CCC?***

No, retirees' spouses may not participate in the CCC, unless they are also receiving their own pension from the WBG. A "retiree" is defined as a WBG "pensioner."

14. ***How and when will I receive a tax receipt/letter for my CCC donation? Are CCC donations via the new giving platform still tax deductible?***

We cannot provide tax advice, and you should check with your own tax advisor as to the tax deductibility of your CCC donations. We can share that CCC gifts that were tax deductible in the past will continue to be so, and that you will receive a tax receipt for them. Gifts to non-U.S. charities, however, might not be tax deductible. Contributions arranged via external donations can also still be tax deductible; however, you will receive your tax receipt directly from the organizations themselves, not from the CCC.

If you made your pledge via credit card or PayPal, which means your payment is direct and effected in real time, you will automatically and immediately receive an Official Receipt for Income Tax Purposes (or a confirmation if the gift is not eligible for tax deduction) upon making your pledge in the CCC system. Your tax receipt/confirmation will arrive via your email, and it can also be found posted under My Profile under Giving, Donation Receipts in your Dashboard.

Please note that your tax receipt will be from either the American Online Giving Foundation (AOGF) or the United Kingdom Online Giving Foundation (UKOGF), depending on the location of the organizations you have supported. For organizations based in the United States, your receipt will be from the AOGF; for organizations based outside the United States, your receipt will come from the UKOGF. These two foundations are public charities which are acting as "receiving charities" to process our CCC donations made through the Benevity online giving site.

Your tax receipt/confirmation will include an appendix that lists each of the eligible CCC organizations that you have supported through one-time or recurring donations via your credit card or PayPal account. This list will also indicate which of your donations were awarded a corporate matching contribution. Please note, however, that this appendix is not an official tax receipt because corporate matches are not tax deductible.

15. ***How can I get answers to further questions about participating in the FY20 CCC?***

The CCC Benevity website address is: <https://worldbankgroup.benevity.org/user/login>. A link to the site is posted on the 1818 Society website, at www.wbgalumni.org, but you will still first need your log-in details provided in the launch email in order to access it there.

If you have further questions, please send an email to comoutreach@worldbank.org, or contact Kris Zedler on kris.zedler@gmail.com. You may also contact support@benevity.org for help with specific pledging questions or issues.

