Thank you for serving as a campaign worker. You are a CFC superhero!

2019 Campaign Coordinator Guide
(AKA CFC Handbook for Superheroes)
How the CFC Works for Campaign Workers

1. Prepare for your role
   Learn about the CFC and your responsibilities as a campaign worker through training sessions and resources. Choose your cause and make your pledge before encouraging others to give.

2. Inspire your colleagues
   Plan fun events, involve charities, use inspirational stories, and personally ask your colleagues to join you in giving. Make giving easy by assisting with online donations and paper pledge submissions.

3. Help is on the way
   Your efforts will bring help and hope to millions of people as monetary and volunteer pledges go to support the missions of thousands of participating charities.

SSgt Reachon Davidson
U.S. Air Force
Managing a Successful Campaign

Campaign Activities

Following the instructions in this checklist will help you lead a successful 2019 campaign. For an explanation of the terms and acronyms used in this checklist, please see the Glossary at the back of this guide.

Pre-Campaign

☐ **Attend campaign training** and/or meet with your local CFC office. Check the local website to find the time/location of campaign training(s) in your area. In some cases, campaign training may be an online event. Even if you have experience as a Campaign Manager/Coordinator, attending training is important to learn about the new tools and resources available for you this year.

☐ **Make a campaign plan** using the template provided by your local CFC office. Consider the following areas:
  • Set CFC kickoff and closing dates for your agency/installation
  • Implement a kickoff and other campaign events
  • Schedule promotion, marketing, and agency/installation wide communications
  • Obtain leadership support from your agency head/installation commander
  • Identify, train, and motivate Keyworkers
  • Plan for awards, recognition, and closing events

☐ **Review your department or agency resources and structure.** Identify all of the physical locations of your agency/installation and obtain the number of employees in each office/unit. This information will allow you to determine the quantity of supplies to order/print, delivery locations, and number of Keyworkers you will need. Report any changes to campaign structure/offices from previous years to your local CFC office.

☐ **Meet with your leadership** (i.e., agency head, installation commander, or campaign chairperson) to secure their support for your campaign plan and ensure their active involvement in the campaign. You will also want them to set a dollar goal for your campaign. Obtain your agency’s previous CFC results from your local CFC office to help in setting a goal. The most successful campaigns are those with visible support from a department or agency’s top leaders with a measurable goal to attain by the end of the campaign.
Things the Campaign Chairperson can do to Support the Campaign:

- Ask all managers to endorse the campaign and identify a Keyworker for their unit. (Keyworkers should be recruited at a ratio of 1 per 25 employees.)
- Send an email or memo endorsing the campaign (there are templates available on the website.)
- Promote CFC service as an element of professional and educational development.
- Vocally support the goals of your agency/installation.
- Ask for campaign updates in executive management meetings.
- Be the first to make a CFC pledge. Use this as a photo opportunity to promote the campaign.
- Participate personally in campaign events.
- Send a “thank you” email at the conclusion of the campaign (a template is available on the website).
- Recognize campaign team members for great service.

- Identify and train Keyworkers and establish a campaign support committee to meet regularly during the course of the campaign. Keyworkers and committee members will plan and implement critical elements of your campaign, including communications, logistics, marketing, labor, and event planning and support. If possible, include next year’s Campaign Manager on your committee. Invite enthusiastic, creative employees who represent different age groups, offices, and backgrounds.

- Meet with other internal teams to assist with campaign needs. Identify IT contacts as members of your committee who will provide technology support and help address technology issues such as firewall blocking. Create a plan for internal tracking and reporting of campaign results, including who is responsible for submitting any paper pledges. Contact your ethics office to discuss approval processes for events and activities. Contact your communications team to assess necessary approvals.

- Order/print supplies. Base the quantity of each supply on the number of employees. See the Ordering Guide on the website for detailed instructions on which materials are available to order and how to order them and which materials are available online for printing.

During the Campaign

- Promote the campaign. Use posters, donor cards, email, social media, intranet sites, press releases, and events to educate and motivate employees to Show Some Love. With Keyworkers, focus on face-to-face contact with each individual employee.

- Hold campaign events. Well executed events can be powerful tools to educate and motivate donors about the CFC. See the Event Planning Guide and events section on the website for ideas and instructions.
Meet regularly with your Keyworkers and/or campaign committee. Hold weekly meetings with Keyworkers and committee members to offer motivation, answer questions, review procedures, and share best practices. To help Keyworkers stay on track, provide a weekly goal for number of contacts.

Track results and brief leadership. Meet with your leadership weekly to brief them on campaign progress, upcoming events, and review ways for them to get involved. Work with your local CFC office to access campaign progress reports.

Collect and submit completed paper pledges weekly. See the Handling Paper Pledges section in this guide or on the website for detailed instructions.

Post-Campaign

Show Some Love to campaign workers and donors by thanking them sincerely. Remember to order your CFC awards and certificates well ahead of your awards ceremony.

Close out the campaign. Order awards, plan an internal awards ceremony, collect and submit final pledge forms, and attend your local campaign’s regional awards ceremony, if applicable.

Report back. Prepare a “lessons learned” report to present to next year’s Campaign Coordinator. Provide feedback to the local CFC office to help improve the campaign.

Promote Giving

- Participation in the CFC is strictly voluntary. No coercion is permitted or tolerated. The following list outlines several ways to promote voluntary and enthusiastic giving:
- Supervisors and leaders should demonstrate visible and tangible support for the campaign through speeches and general messages. However, they should not serve as Keyworkers or directly ask their subordinates to participate in the CFC.
- Campaign results should be shared (and celebrated) as an aggregate. Individual pledges should never be shared.
- Campaign workers may keep a private list of donors who are to receive a thank you gift. These lists should never be shared, especially with leadership.
- Aggregate campaign goals are encouraged and help motivate a spirit of camaraderie, but they should never be set for 100 percent participation or broken down as a dollar amount per person.
Building an Effective Campaign Team

Building a strong team to help you implement the CFC in your agency/installation is vital to the success of the campaign and can be accomplished in three phases. Work with your leadership to recruit and identify strong, outgoing, positive individuals to serve as Keyworkers. Then, work with your local CFC office to ensure they receive the training they need to get started. Finally, communicate with them throughout the campaign period to keep motivation high.

**Phase One: Recruiting**

Have your leadership initiate an official request/memo/tasker to request Keyworkers and ensure this is distributed to all managers/supervisors.

- Ask successful Keyworkers from previous years to serve again. Seek their recommendations for others who would make good Keyworkers.
- Look for committed employees who follow through, are effective communicators, enjoy giving back, and/or support a charitable cause.
- With direction and support, new staff can make great Keyworkers. It’s an opportunity for them to meet other staff and show their leadership and communication skills.
- Emphasize that Keyworker service is a positive opportunity providing visibility, networking connections, and the opportunity to hone leadership skills.

**Phase Two: Training**

In coordination with your OC or LE, schedule a Keyworker training session for your team. Hold multiple sessions and make-up sessions if necessary.

- Every Keyworker should attend a training session. Check with your OC to find out if online Keyworker training sessions are available for anyone that cannot attend your session.
- Review the Keyworker Guide and PowerPoint presentation in advance. Coordinate with your OC or LE to determine your role for the presentation.
- Hold Keyworker training in a comfortable space with the ability to show PowerPoint slides and access to the internet. The session will take about one hour.
- Make the session interactive by:
  - Using sketch cards to encourage Keyworkers to share their favorite cause.
  - Provide an opportunity to practice telling their story and inviting co-workers to make a pledge.
  - Demonstrate how to access the pledge site and resources that are available through the website including tips, stories, templates and downloadable materials.
  - Ask for a commitment to make face-to-face contact with 100 percent of employees.
  - Make sure everyone understands the mechanics of the campaign and how to submit paper pledges.
**Phase Three: Ongoing Motivation**

Hold weekly check-in meetings with Keyworkers to review progress, answer questions, and share best practices. These meetings can also be used to plan upcoming events or activities (such as CFC Spirit Week and Finish Strong week).

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**Promoting the Campaign**

Make sure your co-workers know it is CFC season by promoting the campaign everywhere you can. Research has shown it takes 4 to 6 touchpoints before an individual takes action. Here are a few ideas to get you started. For more ideas, see the Event Planning Guide or visit the website.

- Organize a CFC kickoff event to jumpstart your campaign and build enthusiasm among employees.
- Hold a charity fair or arrange for a visit to local charities to educate colleagues about the many organizations counting on their support.
- Hang campaign posters to build awareness and encourage colleagues to Show Some Love.
- Develop a special CFC section on your intranet that highlights the benefits of giving, tells inspiring stories of people who have been helped by the campaign, shows photos of your campaign activities, and highlights progress toward your goals.
- Post about the campaign on social media and engage with the CFC’s social media accounts.
- Consider organizing a CFC day of service to include federal employees who may wish to expand their impact and volunteer time through the campaign.
- Use the “Cause of the Week” to highlight stories and inspirational messages about the different causes that are a part of the CFC.
- Hold an internal CFC Celebration Event to thank participants, showcase your results, and recognize campaign staff and others who helped make the campaign a success.

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**Reaching Out to Remote Employees**

1. Hold a special online kickoff (e.g., webinar) with charity guest speakers and information about the campaign. Demo the Virtual Charity Fair on the website.
2. Provide each employee with a copy of the electronic pledge walkthrough slides.
3. Ask leadership to record a brief video or phone message.
4. Create a CFC intranet page with progress, events, and information.
5. Send periodic email reminders with compelling charity success stories. Consider tying these in with the Cause of the Week.
6. Host electronic contests.
Handling Paper Pledge Forms

Although giving online is easier than ever, some donors may still prefer to give using a paper pledge form. If so, they can submit forms directly to a campaign worker. If pledge forms are submitted to Keyworkers, they must be stored in a secure location until they are able to be delivered to the Campaign Manager/Coordinator. Forms should be reviewed by Keyworkers for legibility, details, and calculation of the charity allocations.

To submit pledge forms, Campaign Managers/Coordinators should:

1. Download and complete the CFC Pledge Report Summary form from the website.

2. Enclose it and the pledge forms in the Pledge Report Envelope. If you do not have a Pledge Report Envelope, you may use a regular envelope addressed to the CFC Processing Center: P.O. Box 7820 Madison, WI 53707-7820.

Donors who wish to submit a confidential pledge may insert their pledge form in a plain white envelope and write “confidential” on the outside. Campaign workers should not open these envelopes, but rather submit them straight to the CCA processing center. NOTE: If a donor requests, you may provide the CCA address for them to send in the pledge form directly. However, encourage them to go over the pledge form with a Keyworker to ensure accuracy.

Who can pledge using which method?

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<tr>
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<th>Online</th>
<th>Paper Pledge Form</th>
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<tr>
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<td>Payroll Deduction or Annuity</td>
<td>Credit/Debit/ACH (one-time or recurring)</td>
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<td>Federal employees</td>
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<td>Federal retirees</td>
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<tr>
<td>Federal contractors</td>
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Awards and Recognition

One of the campaign’s most important activities is taking the time to Show Some Love to donors, campaign workers, and participating agencies/units by saying “thank you.” Recognition and appreciation builds morale and a strong foundation for the following year’s campaign. Timely recognition can even improve participation in the current campaign. For more information on your local zone’s recognition program, please visit the website.
FAQs

Where can I turn for more help?
For questions about implementing the campaign: contact your local CFC office. For pledge-related questions, contact the CCA at 800-797-0098 or 608-237-4898. For CFC policy questions, contact OPM at 202-606-2564 or cfc@opm.gov.

How do charities become part of the CFC?
Charities must apply to be part of the CFC. Each charity must be a 501(c)(3) nonprofit organization, submit an IRS Form 990, describe its human health and welfare benefits, and meet other requirements. Application information can be found at https://cfccharities.opm.gov.

How much does the CFC actually benefit charities?
Charities rely on the CFC. It is a critical source of revenue and an inexpensive way to attract new donors. Charities require diverse streams of income, including foundations, corporations, direct mail, special events, and the CFC. CFC donations are especially treasured because they are unrestricted funds, allowing nonprofit organizations to effectively respond to community needs. Equally important, CFC donations provide charities with a source of funding throughout the year.

How do I choose a charity to support?
The charity search function at opm.gov/ShowSomeLoveCFC can help you find the right charity for you. Search for causes that interest you and get a list of charities that support that cause, then make your donation online or by filling out a paper pledge form.

What is the minimum contribution?
Minimum contribution amounts via payroll deduction are $1 per pay period per charity. The minimum credit card donation is $10. The maximum online contribution is $99,999. However, maximum payroll deduction gifts may be limited by each payroll service provider (for example, active duty members of the Army, Navy, and Air Force are limited to $9,999).

Can you explain a charity’s overhead or administrative ratio?
Overhead includes costs like salaries, rent and facilities costs, technology requirements, advertising and mailing, events, etc. These costs vary depending on mission scope, location, and technology/salary requirements.
CFC Glossary of Key Terms and Acronyms

*Agency/Installation Campaign Chairperson*
The agency leader, installation commander, or their designee who supports the campaign by participating in special events, approving campaign goals, and providing the resources necessary to run an effective campaign.

*Campaign Manager/Coordinator*
The federal employee selected by the agency head or installation commander to lead the agency/installation CFC effort. The Campaign Manager/Coordinator, in collaboration with the Campaign Chair, under the direction of the OC, develops a plan to communicate about the CFC to all employees, recruits a planning committee, coordinates with unit leaders to identify Keyworkers, facilitates Keyworker training, and supports the implementation of all planned events.

*Central Campaign Administrator (CCA)*
The organization responsible for developing and maintaining the national CFC giving website, receiving pledge data, and making distributions to charities. The CCA can be contacted at: 800-797-0098 (toll-free), 608-237-4898 (local/international), or cfcgiving.opm.gov/contact.

*Keyworker*
A federal employee who personally contacts colleagues to promote the CFC, answers questions, and asks people to participate by making a monetary gift and/or pledging volunteer hours.

*Loaned Executive (LE)*
A federal campaign assistant detailed to work for the CFC for a specified length of time (as determined by the LFCC and the LE’s federal agency) to support campaign activities. (Note: not all campaign zones use LEs.)

*Local Federal Coordinating Committee (LFCC)*
Each of the 36 local CFC zones is governed by a Local Federal Coordinating Committee (LFCC) which serves as a board of directors for the campaign zone. LFCCs are overseen by OPM and must comply with CFC regulations and guidance memoranda, as well as meet the deadlines in the CFC calendar. LFCCs are responsible for selecting an Outreach Coordinator (OC) to implement the CFC in the local zone and monitoring their work.

*Office of Personnel Management (OPM)*
Oversight of the entire CFC program is the responsibility of the Office of CFC Operations at OPM in Washington, D.C.

*Outreach Coordinator (OC)*
The entity selected by the LFCC to implement campaign marketing and logistics within the zone. The OC is responsible for campaign worker training, printing, and distribution of campaign materials, coordinating with charities in support of CFC events, and all campaign marketing activities.
Great Reasons to Give through the CFC

1. The **Hard Part** is done!
   Thousands of charities are already vetted and approved for you to choose from.

2. It’s SO **CONVENIENT**
   You can pledge via payroll deduction.

3. **Choose your Favorites**
   You can support multiple charities in one pledge.

4. **it’s easy to RENEW**
   The secure online giving platform makes it easy to renew your gift each year.

5. You can even **Volunteer**
   Don’t limit your giving. Extend your impact by pledging volunteer hours.

6. We can have a **BIG impact**
   Together we have a collective impact, supporting the thousands of charities that depend on our generosity.
Tips for Being an Effective Campaign Leader

- Make a campaign plan
- Involve senior leadership
- Build a campaign committee
- Recruit and appreciate Keyworkers
- Promote the campaign
- Track results
- Celebrate your accomplishments