



2020

Campaign Management Guide



Combined Federal Campaign (CFC) Handbook

Thank you for serving your community as a Campaign Manager!



GiveCFC.org

Why give through the CFC?

We know there are a lot of giving options out there.
You might be wondering, why should I give through the CFC?
Here are a few great reasons:



Give through **Payroll Deduction**

Spreading your gift over the year makes it automatic, easier at tax time, and it really adds up for your favorite causes!



Give to **Multiple Charities**

Make all of your charitable donations and pledge volunteer hours in one place.



Give for **Collective Impact**

When we give together, it means bigger checks for charities.



Looking for even more reasons?

Tax-Deductible Giving • Unrestricted Funds for Charities • Easy to Renew
Long-Standing Federal Tradition • You Can Even Volunteer • Secure Online Giving Platform
Thousands of Vetted Charities • Makes Fundraising Easier for Charities



Show Some Love at opm.gov/CFC

How the CFC Works

for Campaign Managers






1 Prepare for your role.

Learn about the CFC and your responsibilities as a campaign worker through training sessions and resources. Choose your cause, pledge, and engage with the campaign before inviting others.

2 Inspire your colleagues.

Be a CFC champion by planning fun events, involving charities, using inspirational stories, and personally asking your colleagues to join you in giving. Make giving easy by assisting with online donations and paper pledge submissions, and sharing how to use the brand-new CFC Giving Mobile App.

How to use the new CFC Giving Mobile App

-  **Download the App.** The CFC Giving Mobile App is available for Apple and Android devices by searching “CFC Giving” in the app store.
-  **Sign in or create an account.** Returning donors: Use the same login as your CFC online pledge portal account. New donors: Create an account, verify it, and set up your profile. (*Note for new users:* To ensure your office/unit receives credit for your pledge, click DONATE on GiveCFC.org, log in to the account you created, and update your profile to select your Department/Agency/Office.)
-  **Search for charities.** If you are attending a campaign event, you can see the list of charities participating in your event. Or you can generate your own list of CFC charities and their descriptions by entering search criteria: charity name, CFC code, EIN, or keyword.
-  **Give.** Tap each charity you would like to support and enter the dollar amount of the donation you would like to give.
-  **Complete your donation.** Update or add a funding source (bank account or credit/debit card).

Need Help? If you need assistance navigating the app, please call TASC Customer Care at 1-800-797-0098. Hours of operation are 8 a.m. – 5 p.m. (CST).

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.



Managing a Successful Campaign

Following this checklist will help you lead a successful 2020 campaign. For an explanation of the terms and acronyms used in this checklist, please see the Glossary on page 11 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 zone. Campaign training may be conducted as an in-person training or an online event, if necessary. Even if you have experience as a Campaign Manager/Coordinator, attending training is critical to learn about the new tools and resources available this year, including the CFC Giving Mobile App.

Make a campaign plan using the template provided by your local CFC office. Consider the following guidelines:

- Review 2019 results, the 2020 campaign calendar, and consider scheduling a meeting with the 2019 Campaign Manager.
- Obtain leadership support from your agency head/installation commander.
- Set CFC start and closing dates for your agency/installation.
- Implement a kickoff and other campaign events and make sure your top leadership is available for those events.
- Schedule promotions, marketing, and agency/installation-wide communications.
- Identify, train, and motivate Keyworkers.
- Plan for awards, recognition, and closing events.

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.

Review your department or agency resources and structure. Identify all of the physical locations of your agency/installation (for military installations this includes tenant units) and obtain the number of employees in each office/unit. This information will allow you to determine the number 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. Create a list of each office/unit and their corresponding CFC Code(s) and ZIP code to provide to your team.

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 implementation. If possible, include next year's Campaign Manager on your committee. Invite enthusiastic, creative employees who represent different age groups, offices, and backgrounds.

Managing a Successful Campaign *(continued)*

Meet with other support teams.

- Information Technology: Provides technical support and addresses issues such as firewall blocking.
- Ethics Office: Assists with necessary approvals for processes and events.
- Public Affairs/Communications Team: Distributes information about the campaign, including memos, announcements, articles, and events.
- Internal Team: Responsible for submitting paper pledges and tracking results.

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 desktop or internal printing.

During the Campaign

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

Host campaign events. Well-executed events, either on-site or virtual, can be powerful tools to educate and motivate donors about the CFC. See the Event Planning Guide and events section on GiveCFC.org for more event ideas and instructions.

Host regular meetings with your Keyworkers and/or campaign committee to offer motivation, answer questions, review procedures, and share best practices. To help Keyworkers stay on track, provide a weekly goal for a number of contacts and track their progress.

Track results and brief leadership. Brief your leadership weekly on campaign progress, upcoming events, and review ways for them to get involved. Refer to the Leadership Toolkit for more information and coordinate with your local CFC office to access campaign progress reports.

Collect and submit completed paper pledges weekly. See the Handling Paper Pledges section on page 9 of this guide or on the website for detailed instructions.



Things the Leadership 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 and progress 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). Consider sending one midway through the campaign to thank those who have already pledged and remind those who have not to consider participating.*
- *Recognize campaign team members for exceptional service.*

Managing a Successful Campaign *(continued)*

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 or add to your agency's CFC binder to present to next year's campaign coordinators. Provide feedback to the local CFC office to help improve the campaign.

How to Promote Giving



Do!

- ✓ Promote voluntary giving.
- ✓ Have supervisors and leaders demonstrate visible and tangible support through speeches and general messages.
- ✓ Share (and celebrate) campaign results!
- ✓ Keep a private list of donors who are eligible to receive a thank you gift.
- ✓ Set cumulative campaign goals to encourage and help motivate a spirit of camaraderie.

Don't!

- ✗ Use coercion for giving.
- ✗ Allow Leaders and supervisors to serve as Keyworkers or directly ask their subordinates to participate.
- ✗ Share individual pledges.
- ✗ Share list of donors, especially with leadership.
- ✗ Set 100 percent participation requirement or break down 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 campaign's success and can be accomplished in three phases. Work with your leadership to recruit and identify energetic, outgoing, positive individuals to serve as Keyworkers. Think about recruiting both newer employees as well as more experienced. 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 Keyworker training sessions for your team. Host multiple sessions, with a virtual component for remote workers, if possible, and make-up sessions if necessary.

- Every Keyworker should attend a training session. Check with your OC to find out additional information for online Keyworker training sessions available for anyone who cannot attend your sessions.
- Review the Keyworker Guide and PowerPoint presentation in advance. Coordinate with your OC or LE to determine your role for the presentation.
- Host Keyworker training in a comfortable setting for your team with the ability to show PowerPoint slides. If you are conducting an online training session, make sure you have access to the internet. If possible, stream via your video conferencing platform and include a call-in number for remote employees. The session will take about one hour.

Building an Effective Campaign Team *(continued)*

How to conduct a successful online training session:

- *Test the platform you plan to use before the training so you can work out any technical difficulties.*
- *Keep the training short. People's attention spans begin to wander after 30 – 40 minutes.*
- *Prepare any videos you want to show ahead of time. Play them through before the training so they will already be buffered and ready to go.*
- *Be as interactive as possible with the participants. Ask for feedback and break up the training by launching quizzes and polls throughout the session.*
- *Share your screen to demonstrate the online pledge portal, the Virtual Charity Fair, and other resources/engagement activities available on the website.*
- *Invite a charity speaker to start the training with a success story. Contact your local CFC office to request a charity speaker.*
- *Keep your eyes on the camera and speak in a clear and engaging manner.*
- *Enable webcam functions and ask others to enable their webcam feature if possible.*



Phase Three: Ongoing Motivation

Host 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 #GivingTuesday and Finish Strong week).



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. If possible, stream on your intranet, social media, or video conferencing platform to engage remote employees.
- Host a charity fair or arrange for a visit to local charities to educate colleagues about the many organizations counting on their support.

➔ **Go Virtual!** Stream a virtual tour of a charity's facility.

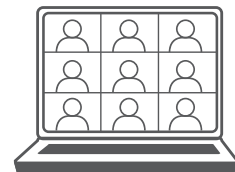
- Distribute and hang campaign posters to build awareness and encourage colleagues to *Show Some Love*.

➔ **Go Virtual!** Utilize the fillable PDF version of the barometer poster to measure campaign progress. Send it out weekly, via email, or post on your agency's intranet site.

- 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.
- Host or stream an internal CFC Celebration Event to thank participants, showcase your results, and recognize campaign staff and others who helped make the campaign a success.

Reaching Out to Remote/Teleworking Employees

1. Host 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 the PDF version of the How to Pledge donor card.
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 and events. See our Events Guide for more ideas!





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 can be delivered to the Campaign Manager/Coordinator. Keyworkers should review forms 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 the Pledge Report Summary form and the paper 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 CFC Processing Center.

NOTE: Encourage donors to go over the pledge form with a Keyworker to ensure accuracy of their pledge.

Ways to Give	Online		Mobile		Paper	
	One-time	Recurring	One-time	Recurring	One-time	Recurring
Payroll Deduction		●				●
Credit / Debit Card	●	●	●			
Check / Bank Transfer	●		●		●	
Volunteer Hours	●				●	

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 help to build morale and a strong foundation for the following year's campaign. Timely recognition can even improve participation in the current campaign. Consider submitting campaign contest entries to your local zone to celebrate and recognize your campaign team's efforts throughout the campaign. For more information on your local zone's recognition program, please visit the website at GiveCFC.org.

FAQ's

Where can I turn for more help?

For questions about implementing the campaign: contact your local CFC office. For pledge-related questions, contact the CFC Processing Center 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 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 income streams, including foundations, corporations, direct mail, special events, and the CFC. CFC donations are especially treasured because they are unrestricted funds, allowing nonprofit organizations to respond to community needs effectively. 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 fill 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.

Tips for Being an Effective Campaign Worker

Make a campaign plan



Involve senior leadership



Build a campaign committee



Recruit and recognize keyworkers



Promote the campaign



Track results



Celebrate your accomplishments

