



## **CAMPAIGN GUIDE FOR COORDINATORS AND KEY WORKERS**

### **WELCOME!**

**THANK YOU** for agreeing to serve as CFC coordinators and Key Workers. You are the vital link between charities and donors.

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## **Campaign Contact Information**

**Campaign Chair:**

Brenda Alwin, IRS

**LFCC Chair:**

Shannon Kennedy, OPM-Eastern Management Development Center

**Official Campaign Dates:**

September 1 – December 15, 2015  
(Solicitation Time Period)

**Campaign Contacts:**

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## **HISTORY**

Combined Federal Campaign (CFC) began in the early 1960's to coordinate the fundraising efforts of various charitable organizations so that federal donors would only be solicited once in the workplace and have the opportunity to make charitable contribution through payroll deductions.

The CFC is the annual fund-raising drive conducted by federal employees in their workplace each fall (September 1 – December 15). Each year federal employees (civilian and military personnel) raise dollars through the CFC of non-profit charities.

The CFC is the world's largest and most successful annual federal workplace fundraising drive. Each year, more than 150 CFC campaigns throughout the country and internationally help to raise millions of dollars.

The mission of the CFC is to support and to promote philanthropy through a voluntary program that is employee-focused, cost-efficient and effective in providing all Federal employees the opportunity to improve the quality of life for all.

The CFC is under the U.S. Office of Personnel Management (OPM). OPM has designated the responsibility of day to day management of CFC to the Office of CFC Operations (OCFCO).

Each local campaign is managed by a Local Federal Coordinating Committee (LFCC), which serves as a Board of Directors. The LFCC is made up of Federal employees and representative labor unions with Federal employees as members. The Eastern Panhandle CFC (EPCFC) covers federal workers in Berkeley, Jefferson and Morgan counties in West Virginia.

The LFCC selects a voluntary organization to serve as the Principal Combined Fund Organization (PCFO), whose job is to manage the campaign and serve as fiscal agent. OPM sets strict requirements for this role. Annual audits carried out by an independent auditor are required of the PCFO.

**EASTERN PANHANDLE  
COMBINED FEDERAL CAMPAIGN  
HISTORICAL SUMMARY**

<b>YEAR</b>	<b>GOAL</b>	<b>TOTAL PLEDGE</b>	<b>PART. RATE</b>	<b>AVERAGE PLEDGE</b>
<b>2005</b>	<b>132,800</b>	<b>157,395</b>	<b>17%</b>	<b>\$266</b>
<b>2006</b>	<b>134,300</b>	<b>159,194</b>	<b>17%</b>	<b>\$259</b>
<b>2007</b>	<b>137,030</b>	<b>168,342</b>	<b>16%</b>	<b>\$277</b>
<b>2008</b>	<b>152,800</b>	<b>197,766</b>	<b>14%</b>	<b>\$288</b>
<b>2009</b>	<b>168,000</b>	<b>186,542</b>	<b>15%</b>	<b>\$281</b>
<b>2010</b>	<b>175,000</b>	<b>228,810</b>	<b>16%</b>	<b>\$320</b>
<b>2011</b>	<b>190,000</b>	<b>239,533</b>	<b>18%</b>	<b>\$286</b>
<b>2012</b>	<b>193,000</b>	<b>194,453</b>	<b>12%</b>	<b>\$372</b>
<b>2013</b>	<b>175,000</b>	<b>196,000</b>	<b>10%</b>	<b>\$412</b>
<b>2014</b>	<b>167,600</b>	<b>180,539</b>	<b>10%</b>	<b>\$429</b>

**GOAL FOR 2015 CAMPAIGN IS \$173,000**

## Campaign Acronyms, Frequently Used Terms and Definitions

<b>Coordinator:</b>	A federal employee assigned to coordinate CFC activities within their agency or department.
<b>Charity Listing:</b>	Guide/brochure; listing of approved local, national and international charities that federal employees use to help designated their pledges.
<b>Designated Funds:</b>	Contributions which the contributor has designated to a specific charitable organization(s), federation(s), or general option(s).
<b>Federation:</b>	A group of voluntary charitable human health and welfare organization established for supplying common fundraising, administrative, and management services to its member agencies.
<b>Independent Organizations:</b>	A voluntary charitable human health and welfare organization not affiliated with a federation.
<b>Key Worker:</b>	A individual recruited by a campaign coordinator to help contact other employees in an agency or department for participating in the CFC. Typically, one Key Worker is assigned for every 50 personnel.
<b>LFCC:</b>	Local Federal Coordinating Committee (LFCC) is a group of federal officials who are designated to conduct the campaign. Various Federal agencies have member on our LFCC.
<b>OPM:</b>	Office of Personnel Management (OPM) is a federal government organization that oversees the conduct of the CFC. It publishes congressionally approved regulations that establish the policies and procedures common to all CFCs.
<b>OCFCO:</b>	Office of CFC Operations (OCFCO) is a division of OPM dedicated to overseeing CFCs.
<b>PCFO:</b>	Principal Combined Fund Organizations (PCFO) is a contractor that manages the campaign. The PCFO is the group selected annually by the LFCC to administer the campaign.
<b>Undesignated Funds:</b>	Contribution which the contributor has not designated to a specific charitable organization(s), federation(s) or the International General Designation Option.

## **CFC FEDERATIONS AND ORGANIZATIONS**

The CFC is divided into federations (an umbrella of organizations) and independent organizations. A federation is a group of charitable human health and welfare organizations established for the purpose of supplying common fundraising, administrative and management services to its members.

Additionally, there are national federations and organization, international federations and organizations and local federations and organizations.

National organizations have programs in a minimum of fifteen states and apply direction to the Office of Personnel Management in Washington D.C. They are listed in the directory in the “National/International Agencies” section.

International organizations are present in several countries or in several parts of a foreign country. These organizations also apply directly to the Office of Personnel Management and are listed in the “International Agencies” section.

Local organizations help people in this area or adjacent counties. Local organizations apply to the Local Federal Coordinating Committee, the “board of directors” of our campaign. They too must meet OPM requirements for local eligibility. They are listed under the heading “Local Organizations”.

All of the federation, their member organizations and the local independent organizations in the campaign directory were found eligible to participate in this year’s campaign. Although the federations and organizations receive funds from the CFC, they do not run the CFC. The CFC is an independent fund drive for Federal employees and is not affiliated in any way with any of the organizations or federations except as a conduit for Federal employee donations.

The description of a federation precedes the listing of its member organizations in the Charity Listing. Donors may give their money to a federation, to an organization under a federation, or to an independent organization.

## DONOR DESIGNATIONS

Donors are encouraged to designate their gifts to specific organizations (up to 5 per donor form) OR to federations that are listed in the **Eastern Panhandle CFC Charity Listing**. Designating gifts allows donors to channel contributions to those organizations that best represent their interests or concerns. If one chooses to designate a gift to a federation, the contribution is used to support the work of the federation or is shared with its member organizations in accordance with the federation's policy.

This year's campaign offers more choices than ever through Universal Giving, expanding the number of charities. Universal Giving offers the opportunity for federal employees in our campaign area to not only pledge to charities in our local community, but to other local communities as well. The local charities approved outside of our campaign area are not printed in this charity listing, but are easily searchable on our website using the Charity Search tool. **Write-ins are prohibited.**

### ***Undesignated Funds***

Although donors are encouraged to designate their gifts to particular organizations or federations, and most do, it is not required. If one chooses to make a contribution, but does not want to specify where that contribution is to go, the contributions will still be accepted. These undesignated funds are then shared among all of the organization listed in the Charity Listing in the same proportion that the organizations received designations.

*Note: If an organization receives no designations by any donor, that agency will not receive any of the undesignated money either. Those who designated, in effect, are voting for distribution of undesignated monies.*

## **FEDERAL AGENCY COORDINATOR'S ROLE**

- Assume responsibility of the organization's campaign.
- Develop a campaign structure within your campaign plan.
- Involve the agency director with the campaign.
- Recruit and train Key Workers (some organization may be too small to have key workers)
- Distribute CFC materials to Key Workers (Charity Listings, pledge forms, etc.).
- Meet regularly with Key Workers, keep them informed of campaign progress and provide assistance as needed.
- Collect Report Envelopes from Key Workers that contain **YELLOW COPIES ONLY** and submit Envelope to the CFC office.
- **DO NOT** transfer contents of Key Workers Report envelopes to one big envelope. Submit as many Key Worker envelopes as necessary.
- Process the payroll deduction from CFC Nexus.
- Audit pledge forms before completing the report envelope to ensure that each form has the employee's name and agency payroll number.
- Keep the Key Workers informed of campaign progress and provide assistance as needed.
- Small agencies usually one/two submissions – larger agencies weekly/biweekly.
- Submit pledge form payroll slips (**TOP WHITE COPIES ONLY**) and the CFC Nexus payroll deduction to your payroll office no later than December 15<sup>th</sup>. The earlier the better.
- Research questions-call CFC staff.
- Recognize and thank key workers.

## **FEDERAL AGENCY KEY WORKER'S ROLE**

- Support the CFC Agency coordinator.
- Implement the objectives of the Combined Federal Campaign.
- Develop your campaign plan.
- Assume responsibility for personally contacting your assigned co-workers to ensure they have an opportunity to participate.
- Attend Key Worker training and your agency kickoff event.
- Distribute Charity Listings and pledge forms.
- Collect completed pledge forms from co-workers. Separate **WHITE** copy and give to Coordinator for submission to your payroll office. Place **YELLOW** copy in CFC Report Envelope. **PINK** copy stays with contributor.
- Complete information on front of Report Envelope.
- Submit Report Envelope(s) to coordinator.

## **ROLE OF THE PAYROLL COORDINATOR FOR CFC NEXUS**

Payroll pledges made through CFC Nexus must be printed by **Campaign Coordinators** for delivery to the payroll office. (Just as is done with the white paper payroll pledges). The CFC Campaign Manager will assign Campaign Coordinators special privileges in the CFC Nexus so that they can view and print these payroll copies. **Coordinators must first register at the CFC Nexus and chose a Username and Password. Once registered, Coordinators need to email the CFC office and the campaign manager will upgrade their registration to “Payroll Coordinator.”**

In order to process payroll pledges, Coordinators must log into CFC Nexus using their Username and Password. When logged in, you will see **“Payroll”** in the toolbar across the top of the page. When you hold your cursor over **“Payroll,”** you will see two options for printing pledges: **“Process new pledges (single print)”** and **“Process new pledges (bulk print).”** Follow the prompts to print these pledges and deliver them to payroll.

Coordinators with these special privileges may view lists of contributors and campaign totals at **“View Processed-Completed Pledges”** or at the **“Payroll Report”** under the payroll tab.

All coordinators and keyworkers may view campaign totals for each federal agency by selecting **“Campaign Totals”** under **“Main Menu.”**

CFC Nexus features complete tutorials for CFC Coordinators/Keyworkers on this process. These tutorials can be found on the main menu.

# Seven Steps to a Successful Campaign

## Step One:

### *Establish Support from the Top*

The success of your campaign depends on the commitment and involvement of your top management and senior leadership. Keep them informed of the campaign progress.

- ❖ Help determine campaign goal and objectives
- ❖ Endorse the campaign at all regularly-scheduled staff meeting.
- ❖ Attend campaign events
- ❖ Provide thank you recognition to volunteers and donors.

## Step Two:

### *Develop a Plan*

By looking at where you have been, you can better determine where you are going. Analyzing past campaigns will help you plan this year's. Talking to last year's campaign coordinator/key worker will help you build on previous success and will eliminate what doesn't work in your agency.

- ❖ Review your organizations giving history and analyze campaign data
- ❖ Compare your agency's giving history with CFC's averages for 2013:
  - Average Gift: \$421.00
  - Participation Rate: 10%
  - Last year's Eastern Panhandle CFC raised \$196,000
- ❖ Review you campaign goal for 2014: Decide on the best way to ensure 100% contact of all employees.

## Step Three:

### *Recruit & Train Campaign Committee/Keyworkers*

Your campaign committee/keyworkers can help organize efforts to educate fellow employees about the campaign. They build excitement for the campaign, answer questions and ensure that everyone is asked to give.

- ❖ Include someone from each department on your team-recruit on a 1-to-20 employee basis if you can.
- ❖ Recruit individuals who can organize, have good communication skills, and are enthusiastic, well-known and well-respected by their co-workers.
- ❖ Design your team to split up duties and responsibilities.
- ❖ Hold a planning meeting with your team, assign tasks, establish a timeline and distribute campaign materials.
- ❖ Emphasize payroll deduction.

## **Step Four:**

### *Promote & Publicize*

Education and information are keys to reaching your campaign goals. Create an atmosphere of enthusiasm as you inform employees about their contributions improve lives in our community.

- ❖ Employee testimonials, campaign facts and articles (distributed via print, email or video)
- ❖ Endorsement letters from top management
- ❖ Kickoff events and contests
- ❖ Large and small group meetings (consider including speakers from charities)
- ❖ Posters and banners
- ❖ Charity Listings and pledge forms

## **Step Five:**

### *Educate Employees & Make the Ask*

This is by far the most important step. The major reason people do not give is because they were never asked, so ask everyone! Giving a personal decision-but please be sure to allow everyone the opportunity to contribute.

- ❖ Educate through employee meetings within department/division workgroups
- ❖ Invite every employee
- ❖ Follow up with one-on-one conversation

### *Your meeting should include.....*

- ❖ Management
- ❖ Charity speaker or employee who has personal connection with the message for the campaign
- ❖ Promotion of payroll deduction
- ❖ An opportunity to address donor concerns.
- ❖ Keep presentations SHORT!

## **Step Six:**

### *Report your Results*

Regular reporting allows the team to monitor progress of the campaign, while keeping you from having to hold cash, checks and pledge forms.

- ❖ Develop and communicate a plan for team members or donors to return pledge forms
- ❖ Ensure the pledge form are filled out completely, signed and that the math is accurate
- ❖ Provide weekly progress reports to agency leadership and campaign team.
- ❖ Ensure report envelop totals are accurate
- ❖ Report the final campaign totals to the entire agency

**Step Seven:**  
*Say Thank You*

The importance of thanking everyone who helped you and to accomplish your goals cannot be overemphasized.

- ❖ Send personal thank you email to the campaign team.
- ❖ Have top management send an organization wide thank you and acknowledgement.

# Fundraising Ideas

Special events and fundraisers are one way to help raise money for CFC, but should be used to augment your campaign since the main focus should be pledge forms. However, there is no limit to your imagination to hold a special event, contest or fundraiser!!!!

Here are just a few ideas!!!! Get your key worker involved to come up with creative ways to raise money for CFC.

## **Golf Tournament of Putt-Putt Contest**

Work with a nearby golf course to get reduced rates. Charge the regular price with proceeds going to CFC. Set up humorous prizes to be handed out later such as shortest drive, best putt or highest score. Or set up a miniature golf course in the office, lobby or work area. Charge each player and award a prize to the lowest score.

## **Jelly Beans**

Put jelly beans in a jar and have participants pay to guess number of beans for a prize.

## **Chili Cook-off Contest**

Ask co-workers to cook a favorite chili recipe and enter it into a cook-off contest to be held at lunch time. Have a panel of nominated chili experts select the official chili champion. Award prize.

## **Treasure Hunt**

Sell daily clues to where an advertised treasure is hidden. First employee to guess the location wins the treasure.

## **Food Sales**

Bake goods, hot dogs, bagels, donuts, coffee or make your own sundae.

## **Book Sales**

Ask for donations and set up a booth in the parking area or cafeteria.

## **Ugly tie or hat contest**

Have staff wear an ugly hat or tie and have participants pay to vote everyone. The person with the most votes at the end of the day wins a prize.

## **Other Ideas**

Silent auction, cook out, car wash, potluck lunch, etc.

## Frequently Asked Questions

### **What is the Combined Federal Campaign (CFC)?**

The CFC is the only authorized solicitation of employees in the Federal workplace on behalf of charitable organizations local, national and international.

### **How is the CFC Structured?**

The CFC is made up of local campaigns that raise funds in federal workplaces across the country and around the world. Local charities that serve the local area or adjacent counties apply directly to Local Federal Coordinating Committee (LFCC) – which services as a “Board of Directors” of the local CFC. The LFCC is composed of federal; employees and representatives of labor unions with federal employees as members. Decisions regarding the inclusion of charities in the local campaigns are made by the LFCC. LFCC’s are also responsible for the oversight of the local CFC in conformance with the CFC regulation and policies promulgated by the Office of Personnel Management (OPM). All organization participating in the campaigns must meet strict public accountability criteria set forth in OPM regulations. For more information about the regulations and guidance, please visit [www.opm.gov/cfc](http://www.opm.gov/cfc).

### **Why have a CFC?**

The annual fundraising campaign helps support a variety of health, human and other services. This single campaign is the most cost-efficient fundraising method. It succeeds because volunteers from the federal workforce combine their resources for one coordinated appeal.

### **How are the Charities listed?**

The charity listing includes national, international and local organizations. National and international organizations are approved by OPM and local organizations are approved by LFCC’s.

### **Why are some charities listed, and others are not?**

Every year charities are solicited via advertisements in the community, public forums, and through word of mouth. The charities in the listing completed the extensive application and were found to meet all OPM requirements. Each charity must meet strict guidelines and be approved by the LFCC to participate. Some charities do not meet the stringent requirements, and are denied based on OPM regulations. Many charities do not apply and may not even know about the opportunity. [By referring an agency to us, you can help grow the local charity listing.](#) Some charities choose not to reapply based on the amount of designations they received in prior years

### **How do I designate to a federation, or alternatively, one of its members, to receive my contribution?**

If you wish to designate all or some portion of your contribution to a federation, please record that federation’s corresponding code number on your pledge form. The federation name will be listed at the top of the list of the federation’s member organizations. Contributions designated to a federation will be shared accordance with federation’s policy. If you wish to designate all or some portion of your contribution to a federation member organization, please record that organization’s corresponding code number on your pledge form.

**What if I choose not to specify an organization to receive my CFC contribution?**

All funds contributed to the CFC that are not designated to a specific organization or federation will be distributed to all organizations listed in the Charity Listing in the same proportion as they received designations. Organizations that do not receive designated dollars cannot receive any donations.

**What is the benefit of payroll deduction?**

Through payroll deduction, the amount you specify is withheld each payday throughout the year (January-December). Automatic payroll deduction is the most painless and convenient method of giving, however cash and check gifts are accepted.

**If I elect to donate by check, to whom do I make out the check?**

All checks must be payable to CFC or Eastern Panhandle CFC.

**Can I designate funds to more than 5 charities as provided on the pledge form?**

Yes. You can designate to more than five charities by using additional pledge form(s). The total contribution on each pledge form must match the total donation for the (up to five) charities on that particular pledge form. You cannot designate to an organization that is not listed in the Charity Listing. Adding organization not listed or “write-ins”, is prohibited by CFC regulations and donations to such organizations will be treated as undesignated funds. In addition, pledges made using anything other than the assigned five-digit codes cannot be honored and will be treated as undesignated funds.

**Where does my gift go?**

Directly to your organization of choice listed in the Charity Listing.

**What else do I need to know about the designation process?**

1. By filling out the “Release of Information” section of the pledge form, you are permitting your designated charity to send you an individual letter of thanks. However, they are only allowed to send you a thank you letter; any other correspondence should be reported to the Eastern Panhandle CFC staff or your coordinator. If you wish to receive other information from the charity, you must contact them directly.
2. You can only designate money to charities listed in the current campaign year’s Charity Listing.
3. Contributions are tax-deductible. To ensure you receive your tax deduction, you **MUST** keep the pink copy of your pledge form/confirmation email (if e-pledging) **AND** the last pay stub of the giving year or your W-2.

**Why should I give?**

It is an easy way to help advance medical research, protects our environment and further human rights. It enables you to make a charitable contribution through the ease of payroll deduction.

**How do I know that charity I designated actually receives my gift?**

If you would like to receive acknowledgement, please fill in the contact information on the box titled “Recognition Options” on your pledge form. This will assure that you will receive verification of your contribution.

**How will my privacy be protected?**

CFC regulations prohibit the release of contributors’ names to charitable organizations for the purpose of solicitation. If you want the charitable organization to recognize your contribution, indicate such on the front page of the pledge form by writing in your home address and email and you must check the box to release the pledge amount.

**Can a federal employee donate to a local charity in a neighboring CFC campaign area?**

No. As stated in 950.103(h), a federal employee may participate in a particular CFC only if that employee’s official duty station is located within the geographic boundaries of that CFC. Campaign boundaries are strictly determined and approved by OPM.

**Can new hires be asked to give when they join a federal agency even if it is not during the campaign?**

No. Federal employees may be solicited to give only during the CFC campaign period.

**Can the LFCC extend the campaign period based on local circumstances?**

The LFCC has the authority to determine the campaign period in its area. If an agency needs additional time, the LFCC may grant an extension. No campaign may start before September 1 or be extended beyond December 15 without the permission of the director.

**Do I have to give through the CFC?**

No. Participation in the CFC is strictly voluntary.

Coercion is forbidden. You have the right not to be improperly influenced regarding your decision to give or not to give through the CFC.

If you prefer, you may donate to the CFC anonymously by placing your confidential gift in a sealed envelope.

Civilian employees may register complaints about coercion with the LFCC and contact their personnel offices; military personnel should contact their commanding officers.