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2016 CFC Manager Guide

Intermountain CFC
intermountaincfc.org



Secrets to CFC Success

Your Handbook for Running a *Fantastic* CFC Drive

Introduction

Thank you for serving as the CFC Manager for your federal agency. This position is a fantastic opportunity to network within your organization and increase your skills in management, strategic planning, creativity, problem solving, and time management. More importantly, however, it's an opportunity for you and your co-workers to make a real, positive difference in the world.

This handbook is designed as a reference manual to help you run a successful CFC drive at your federal agency. However, this handbook is more than just a step-by-step instruction manual; it includes proven strategies and techniques that not only will help you prepare, market, and process your CFC drive successfully, but may also benefit you in your day-to-day responsibilities.

Preparation

You may be wondering what you need to succeed as a CFC Manager, and how to get started. The most important pre-requisite for success in this position is desire. If you are passionate about serving others and want to do a good job with the CFC, you'll be successful. The next steps are to register, lay the groundwork for your campaign, and receive training in the pledging process.

Step 1. Register as the CFC Manager

You can register online as your federal agency's CFC Manager at www.intermountaincfc.org. From the "Campaign Team" menu, select "Campaign Managers" and then complete the [online registration form](#).

Step 2. Lay the Groundwork

Start by **(a) analyzing your agency's past results**. To do this, first request a copy of your federal agency's five-year CFC history by e-mailing CFC Director Bruce Jacobs, bjacobs@intermountaincfc.org. Next, talk to last year's CFC Manager to gain insight into which practices worked best in running the CFC at your federal agency.

Now that you have a clear picture of where your agency has been, it's time to **(b) set a goal**. Consider whether your agency has more or fewer employees than in recent years, and set a dollar goal that your agency can realistically achieve while stretching a bit. We recommend looking at your agency's highest CFC achievement in the past five years, and aiming to beat that mark by five percent. Please secure the approval of your commanding officer or agency head before finalizing and publishing the goal.

Having analyzed past results and set a 2016 goal, it's time to **(c) recruit your team** of keyworkers to assist you. A keyworker is a CFC volunteer who helps you contact your federal employee co-workers and provide them with an informed opportunity to give. Keyworkers can also help you plan and creative fundraising events. How many keyworkers do you need? We recommend you aim for a ratio of 1:25, i.e. one keyworker for every 25 employees at your federal agency. (If your agency has fewer than 25 employees, you may elect not to enlist any keyworkers.)

“The most important step in planning your campaign is to enlist the support of your agency’s management team.”

Together with your team, **(d) set your campaign schedule**. The CFC season lasts from September 1 through December 15, but you should pick a shorter timeframe within that window in which to run your campaign. Consider your agency’s internal calendar and make sure to avoid any major obstacles or distractions such as outside inspections, major reports, fiscal-year-end activities, etc. Use **Figure 1** below as a guide, but keep in mind that you may elect to run a shorter or longer campaign, as needed.

Figure 1 – How Long to Run your CFC Drive

Federal Agency Size	Length of CFC Solicitation Period
1-25 Employees	One week or less
25-100 Employees	Two weeks
100-300 Employees	Three weeks
Over 300 Employees	Four to six weeks

Use the table above to determine the length of time you should start and end your CFC solicitation period.

The most important step in planning your campaign is to **(e) enlist the support of your agency’s management** team. Agency managers do *not* need to devote hours of time to the CFC, but their support can pave the way to success. We strongly recommend you download the document “10 Ways Management Can Support the CFC” from the Campaign Manager [toolbox](#) and meet with your agency head to identify which of these steps he or she can take to support your campaign.

Step 3. Get Trained

Now that you are registered and have laid the groundwork for your campaign, it's time to **get trained**. Visit the Intermountain CFC [online calendar](#) and **sign up to attend the CFC training in your area**. At the training, you'll learn how CFC pledges are made, along with many proven strategies and techniques to successfully market your campaign. Finally, you'll learn how to collect and process CFC pledges. These areas of training are all vital to your success.

The CFC offers federal employees **two giving methods** to support their favorite charities, and it's important that you can instruct others how to give through either of these methods:

1. **Payroll contributions.** With this option, federal employees can elect to give a specific dollar amount per paycheck. A majority of federal contributors select this method because it enables them to spread out their annual contribution over 12 (military) or 26 (civilian) pay periods. Many employees find this method is easier on their monthly budget and enables them to give more generously.

Payroll contributions do not begin to accrue until the first pay period of the following calendar year. For example, if a donor signs up to give \$5 per paycheck in October 2016, the first \$5 will not be withheld until the first paycheck of 2017.

Federal employees have four different options to make a CFC payroll contribution. The first three are online tools and all are available at the www.intermountaincfc.org homepage.



- a. **CFC Nexus** is a private (i.e. non-government) tool Intermountain CFC uses to enable federal employees to give online, and to track and analyze CFC pledge data. Any federal employee may register an account with CFC Nexus and use this tool to make a payroll contribution. However, CFC Nexus is *not* tied directly to any federal payroll center; therefore, all CFC Nexus payroll contribution pledges must be printed and processed in a similar manner as paper pledge forms. After a CFC Nexus pledge is entered, it cannot be altered; if employees want to change their CFC Nexus pledge they must request that their original pledge be deleted *prior to its submission to the payroll center* and then submit a new pledge.



- b. **Employee Express (EEX)** is a government human resources (HR) tool to which many federal agencies subscribe. Federal employees should already have an EEX account if they work for the Department of Interior, Department of Transportation, General Services Administration, NASA, Securities Exchange Commission, Social Security Administration, and several others. Payroll contribution pledges are the only type of CFC pledge EEX enables, and only between September 1 and December 15. After a payroll contribution pledge is submitted via EEX, it may be edited until December 15, at which point it is locked in. Employee Express pledges do *not* require any processing by the CFC Manager.



- c. **myPay** is also a government human resources (HR) tool to which many federal agencies subscribe. Federal employees should already have a myPay account if they work for any branch of the military, the

Department of Energy, the Department of Veterans Affairs, the Department of Health and Human Services, the Environmental Protection Agency, and a few others. myPay only accepts payroll contribution pledges, and only between September 1 and December 15. After a myPay pledge is made, it cannot be altered without the employee contacting his or her federal payroll center directly (usually in writing).



- d. **Paper pledge forms** may be used to make a CFC payroll contribution or one-time cash or check contributions. Paper forms cannot be used for credit card gifts. Paper forms have three parts: the original (white) copy, a second (yellow) copy, and third (pink) copy.

2. **One-time contributions.** Federal employees who prefer to give a one-time contribution may do so via check, cash, or credit card.

- a. **Check.** The check should be made payable to “Combined Federal Campaign,” **not** to the contributor’s selected charity. If you receive checks, *please submit them quickly to Intermountain CFC* so the contributor does not have to wait for weeks for the check to clear! Please note that the donor’s bank statement may indicate that the check was cashed by United Way of Northern Utah, which serves as the Principal Combined Fund Organization (PCFO) for Intermountain CFC. United Way will **not** keep the money! It will be passed to the donor’s selected charities when the first campaign disbursement is made in 2017.



- b. **Cash.** Please keep the cash in a secure location until you’re ready to deposit or submit it to Intermountain CFC. Be sure to have a keyworker help you count it, because the cash inside your reporting envelope must match the total written on the outside of the envelope.



- c. **Credit card contributions.** Credit card gifts must be made online via CFC Nexus, and the donor must first have a registered CFC Nexus account. The correct Web address is <https://www.cfcnexus.org/intermountaincfc>. When donors make a credit card contribution, their card is charged immediately, not at the end of the campaign.



For tax purposes, CFC contributors should know that one-time cash, check, and credit card contributions are tax-deductible in the year they were made. One-time gifts less than \$250 do not require a receipt other than a copy of the donor’s pledge form. For cash, check, or credit card gifts greater than \$250, the donor will also need a letter of acknowledgement. Intermountain CFC is happy to provide these letters upon request. You or the donor may

request a letter of acknowledgement by e-mailing CFC Director Bruce Jacobs:
bjacobs@intermountaincfc.org.

Marketing

Now that you know the various CFC pledge methods, you can turn your attention to promoting the campaign. This section will instruct you how to launch the campaign, advertise it, invite colleagues to participate, raise extra money (and morale) through FUN(d)raisers, recognize donors, prepare for CFC awards, thank contributors, and process pledge forms.

Step 1. Launch the Campaign

When you begin your CFC drive, it's helpful to start with a bang! One of the best ways to do that is **hold a CFC launch rally**. A launch rally can be simple or elaborate, depending on the size and needs of your federal agency. At smaller agencies, combining your CFC rally with a regularly scheduled all-employee meeting can be a great way to go. Larger federal agencies may wish to plan a separate event specifically for the CFC. Together with your agency's management team, decide what will work best for your office. **Figure 2** on the next page shows a recommended agenda for a typical CFC rally, with different suggestions about which elements to include, depending on the size of your office.

Figure 2 – The CFC Launch Rally

Use this table as a reference to plan your CFC launch rally.

	Agenda Item	Presenter	Time Required
Include each of these activities in your rally.	Welcome/opening remarks	CFC Manager	1-2 minutes
	Endorsement (1-3 minutes)	Agency Head or Commanding Officer	1-3 minutes
	CFC Overview – what CFC is, how it works, pledging methods, incentive items, etc.	CFC Manager	2-5 minutes
Pick one or more of these activities to include in your rally.	CFC Video (3 minutes)	CFC Manager, via computer/projector	3 minutes
	Charity speaker (ask them to bring a recipient of their services, if at all possible!)	Invited guest charity (make sure the organization is on the 2016 CFC Charity List)	5-7 minutes
	Federal employee speaker	A work colleague or family member	5-7 minutes
	FUN(d)raising activity – choose from among the various FUN(d)raising activities at www.intermountaincfc.org	CFC campaign team	15-30 minutes
Do this!	Closing comments (be sure to say “thank you!”)	CFC Manager, Agency Head, or Commanding Officer	(1-2 minutes)

As Figure 1 (above) illustrates, you can customize the length and content of your CFC launch rally to meet the size and needs of your specific federal agency.

Tips for getting people to the rally:

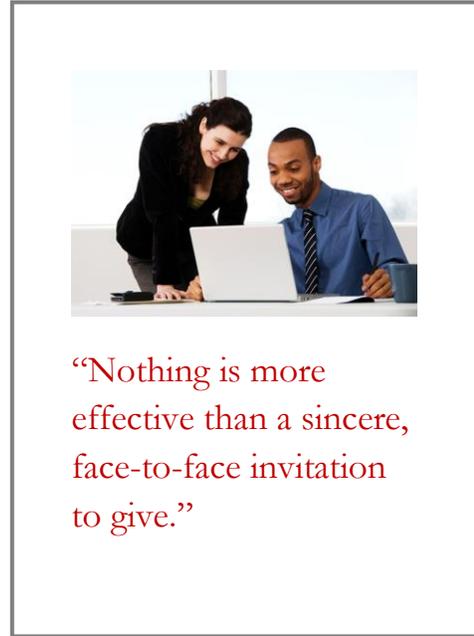
- Make it part of a regularly scheduled meeting (with management approval).
- Get management to promote it.
- Food! Advertise that refreshments will be served.
- Promote your speaker in advance.
- Combine it with a holiday activity such as Halloween, Thanksgiving, etc.
- Offer door prizes (nothing over \$20 in value). If funds are scarce, ask management for non-tangibles such as prime parking spaces, an extra hour for lunch, etc.
- Hold it during the lunch hour and make it a pot-luck event.

Step 2. Use CFC collateral

At your local training event (or via mail, if you participate in online training), you will receive several marketing pieces to promote the campaign and educate potential contributors. If you need more of any item, simply visit the CFC Manager [online order form](#) to request additional items, free of charge.

Here is a list of pre-provided marketing items:

- **Posters** – these come in three “flavors” depicting a few different CFC categories such as health, military support, and education. We recommend you use all three.
- **Thermometer** – this poster enables you to publically set a goal and track your progress toward achieving it.
 - Tip! Ask managers and campaign team members to make their contributions prior to launching your campaign. This way, you can hang a thermometer poster that doesn’t start at \$0.
- **Campaign cards** – these cards depict a CFC contributor example on one side, and instructions for how to make an online pledge on the other side. They come in three “flavors”—Employee Express, myPay, or CFC Nexus. We recommend you give one to every potential CFC contributor.
- **Thank-you cards.** Please use these cards to write a short message of thanks, sign it, and give it to your CFC contributors.
 - Tip! Get the boss to sign it as well.



The following marketing items are available for download at the “[Campaign Toolbox](#).”

- **Flyers** – these educational flyers are great to hang in the break room, on vending machines, in bathroom stalls (captive audience!), bulletin boards, and other public places. Flyer topics include:
- **Payroll Giving slides** – These slides (PDF format) depict various ways that payroll giving can add up to make a positive difference for many different causes.

Step 3. Invite people face-to-face

Nothing is more effective than a sincere, face-to-face invitation to give. If you're serious about success, train yourself and your keyworkers on how to effectively invite others to give *in person*. It may sound intimidating, but it doesn't have to be! Here is a proven method that can be very persuasive:

1. **Share your story.** Use an example from your own life, or the life of a family member or friend, to illustrate how a CFC charity made a difference to you or someone close to you. Be brief, however. Don't make it all about *you*. If you don't have a story to share, then talk about the need. Find statistics or news stories that illustrate that need.

Example: "Hi Bethany. I'm visiting people in the office today to let them know about the Combined Federal Campaign and why it means so much to me personally. (Shares story.) That's why I think giving is so important."

2. **Engage your contact.** Ask about their interests or passions. Listen to their answer! Ask for more information. Your contact may end up convincing himself/herself to give.
3. **Invite courteously.** Say something like, "Our (office/department/wing) has a goal to raise (\$X number) dollars this year through the CFC. Of course, the amount isn't as important as just making a difference. Would you be willing to give a dollar or two per paycheck to a cause that matters personally to you?"
4. **Thank your contact.** No matter what the answer, thank the individual for his or her time. If they don't commit then and there, let them know you'll be back within a certain timeframe and then follow up.

Tip! Practice your approach with campaign members, friends, and in front of the mirror until you're comfortable with it.

Tip! Warm up by first asking friends and people you think are highly likely to contribute.

Tip! Research your contact. Find out about their passions, interests, or concerns in advance, and use examples of charities that address those passions.

Tip! Read ¹[this article](#) on how to ask, but **don't do step 7**, i.e. don't ask for a specific amount—that is not the CFC way.

Tip! *Follow up.* Many people say "yes" and then forget, or say "maybe" and then never get asked again. Following up can be the difference between a mediocre campaign and a great campaign.

Step 4. Use E-mail Effectively

E-mail can be an effective way to reach potential contributors, especially those who may be uncomfortable with a personal invitation.

However, in most cases we recommend you use e-mail as a supplemental way to contact and follow up with contributors, rather than your primary method of solicitation.

The best supplemental e-mail solicitations are brief, heartfelt, and contain a clear call to action. People won't read long e-mail messages, so catch their attention quickly with a short, passionate story (ideally your own or that of a co-worker). Be warm and friendly in tone, and include a picture if possible. End each e-mail with a clear call to action, such as this: "[Click here](#) to make your online contribution now. Instructions for online pledging are attached. Thank you for your generosity."

“Having fun with your CFC activities is truly the ‘secret sauce’ in a successful workplace campaign.”

At a minimum, we recommend that you send an introductory campaign e-mail a day or two after your launch rally, a mid-campaign e-mail, and a final campaign e-mail a day or two prior to the last day of your solicitation period. If that sounds like a lot of writing, don't worry! Intermountain CFC has provided several e-mail templates—complete with stories, pictures, and graphics—that you can download at www.intermountaincfc.org. You'll find them in the [Campaign Toolbox](#).

Step 5. Share the CFC Impact Calculator

A typical concern of potential CFC contributors is whether their contribution will actually make a difference. They want to *see* the results of their contribution before they're comfortable making a financial commitment. Obviously, you do not possess a crystal ball that can enable your co-workers to see exactly how their CFC pledge will impact the lives of others for good. But now we've given you the next best thing to a crystal ball—and it's called the CFC Impact Calculator!

Using the [CFC Impact Calculator](#), potential donors get to “see” examples of what they can do by pledging. Here's how it works:

1. Plug in any whole dollar amount.
2. Choose a frequency, such as one-time contribution, bi-weekly contribution, or monthly contribution.
3. Select a topic of interest, such as healthcare, the environment, basic human needs, disaster relief, and more.

The calculator then provides examples of what the employee's gift can accomplish, depending on the category selected. By scrolling to different categories, the employee can see the power of his or her gift in many different ways. [Check it out!](#)

Step 6. Engage in FUN(d)raising

If you're not having fun with the CFC, you're doing it wrong! Having fun with your CFC activities is truly the "secret sauce" in a successful workplace campaign. That's why we emphasize the "fun" in FUN(d)raising. Having a fundraiser is not about the extra money you raise—in most cases, the extra dollars don't add up to a significant amount—rather, it's about the awareness and enthusiasm these events can generate.

We've made FUN(d)raising easy. Simply visit the Campaign Toolbox and download the CFC [FUN\(d\)raising Ideas booklet](#). It's chock-full of ideas for having fun and raising a few extra dollars while engaging the entire workforce in the spirit of giving.

Step 7. Recognize Contributors, and Encourage Them to Dedicate their Pledge

Please know how crucial it is that you *recognize every single CFC participant for his or her contribution*. We cannot overemphasize the importance of making people feel special for their gifts to charity. Every dollar makes a difference, so please make every participant feel special. See Step 8 for more details.

Intermountain CFC now offers a great (and free!) new service to contributors—the ability for them to dedicate their pledge in honor or memory of a loved one. Before or after making their pledge, contributors can visit [this link](#) and complete a short form to request that a tribute card be sent to the person of their choice in honor or memory of someone special. Please alert potential contributors to this service!

Step 8. Thank Contributors, Volunteers, and Managers

Make sure you thank all campaign participants, including contributors, keyworkers, managers, and other volunteers. Anyone who assists you with the campaign in any way deserves timely recognition for their efforts. Why is this so important? For one thing, it's common courtesy! Another important reason is that it paves the way for future campaign success.

Research indicates that contributors do not remember being thanked unless they have been thanked *at least three times!* Sound like a hassle? Don't fret! We are going to make it easier for you. Here are three ways you can thank your CFC contributors:

1. Give them a sincere, verbal thank-you immediately upon receipt of their pledge form or after you receive confirmation of their online pledge.

2. Intermountain CFC has provided you with a special thank-you card that contains this year's theme artwork. Please write a short, handwritten thank-you message to the contributor. Address him or her by name, and sign your name at the bottom. **Tip!** You may also wish to have your agency's commanding officer sign it, if feasible.
3. Get creative! Send a thank-you e-mail (download a template at the [Campaign Toolbox](#)), hang a banner, put up flyers, record a video thank-you message, etc.

Step 9. Apply for CFC Awards

Each year after the campaign, Intermountain CFC holds a special awards ceremony (usually in February or March) to recognize the federal agencies, campaign leaders, and volunteers who have achieved outstanding results. **Figure 4** illustrates the different individual awards we offer, and how to apply for them. The nomination forms can be downloaded at the CFC [awards page](#).

Figure 4 – Intermountain CFC Individual Awards Program

This table depicts the two award types, the number of each type presented, and how to apply.

Individual Awards & Description	Number Awarded	How to Apply
<p>Most Valuable Volunteer</p> <p>To the top keyworkers or other CFC volunteers who made the most valuable contribution to the overall success of the campaign.</p>	<p style="text-align: center;">3</p> <p>(Intermountain CFC usually presents a few honorable mentions in this category as well.)</p>	<p style="text-align: center;">General nomination form</p>
<p>Campaign Hero</p> <p>To the best CFC Manager based on overall leadership, creativity, and results. Usually nominated by one of the Keyworkers. Award style may vary from year to year.</p>	<p style="text-align: center;">4</p> <p>Broken down by agency size category:</p> <ul style="list-style-type: none"> • Small: 7-19 employees • Medium: 20-49 employees • Standard: 50-99 employees • Big: 100-299 employees • Large: 300+ employees 	<p style="text-align: center;">General nomination form</p>

Submit nomination forms for these individual awards to CFC Director [Bruce Jacobs](#).

Figure 5 below illustrates the different agency-level awards we offer, and how to apply for them. Again, the nomination forms can be downloaded at the CFC [awards page](#).

Figure 5 – Intermountain CFC Agency-Level Awards Program

This table depicts the four award types, the number of each type presented, and how to apply.

Agency Awards & Description	Number Awarded	How to Apply
<p>Over-the-Top Award</p> <p>A certificate for the agencies that raised more money than they did in the previous year.</p>	<p>No limit</p> <p>Broken down by the following levels:</p> <ul style="list-style-type: none"> • Platinum: 50% or greater dollar amount over previous year • Gold: 40% or greater dollar amount over previous year • Silver: 25% or greater dollar amount over previous year • Bronze: 15% or greater dollar amount over previous year 	<p>Automatic – no nomination form required.</p>
<p>All-for-One Award</p> <p>A glass-encased U.S. flag and pedestal for the federal agency with the highest CFC participation rate.</p>	<p>4</p> <p>Broken down by agency size category:</p> <ul style="list-style-type: none"> • Small: 7-19 employees • Medium: 20-49 employees • Standard: 50-99 employees • Big: 100-299 employees • Large: 300+ employees 	<p>Automatic – no nomination form required.</p>
<p>Most Creative Campaign</p> <p>For the agency that used the most innovative activities/strategies to achieve success. Award type varies.</p>	<p>4</p> <p>Broken down by agency size category:</p> <ul style="list-style-type: none"> • Small: 7-19 employees • Medium: 20-49 employees • Standard: 50-99 employees • Big: 100-299 employees • Large: 300+ employees 	<p>General nomination form</p>
<p>Best Overall Campaign</p> <p>To the agency with the most outstanding results in creativity, involving volunteers, and achieving results in both dollars and participation. Award type varies.</p>	<p>4</p> <p>Broken down by agency size category:</p> <ul style="list-style-type: none"> • Small: 7-19 employees • Medium: 20-49 employees • Standard: 50-99 employees • Big: 100-299 employees • Large: 300+ employees 	<p>Best Overall Campaign nomination form</p>

Submit nomination forms for these agency-level awards to CFC Director [Bruce Jacobs](#).

Pledge Processing

Congratulations! You have run a successful campaign and raised a significant amount of money for CFC charities. Now it's time to process pledge forms and report your results. **Figure 6** below shows you how to process the various types of pledge forms.

Figure 6 – Pledge Processing Methods

This table shows how to process paper and online pledge forms.

Pledge Type	Processing Method
Thee-part paper form – cash or check	<ol style="list-style-type: none"> 1. Return the pink copy to the contributor. 2. Shred the white (top) copy or return it to the contributor. 3. Put all yellow copies in the CFC reporting envelope and send them to: Intermountain CFC 2955 Harrison Blvd., Suite 201 Ogden, UT 84403
Thee-part paper form – payroll contribution	<ol style="list-style-type: none"> 1. Return the pink copy to the contributor. 2. Mail all white copies to your federal agency's payroll center. Do not send the white copies to Intermountain CFC. 3. Put all yellow copies in the CFC reporting envelope and send them to: Intermountain CFC 2955 Harrison Blvd., Suite 201 Ogden, UT 84403
myPay – payroll contribution	No processing required! You do not need to send any information about these pledges to Intermountain CFC.
Employee Express – payroll contribution	No processing required! You do not need to send any information about these pledges to Intermountain CFC.

As Figure 6 (above) illustrates, myPay and Employee Express contributions do not require processing. Only white copies of payroll contribution paper pledge forms need to be sent to your payroll center. Send all yellow copies of paper pledge forms to Intermountain CFC.

Figure 7 –Processing CFC Nexus Pledges

This table shows how to process CFC Nexus online pledge forms.



CFC Nexus Type	Processing Method
Credit card contribution	No processing required! You do not need to send any information about these pledges to Intermountain CFC.
CFC Nexus payroll contributions To watch how to do this in a step-by-step video, click here .	<ol style="list-style-type: none"> 1. Register an account with CFC Nexus. 2. E-mail Bruce Jacobs and request to become a payroll specialist for your agency. 3. Log into CFC Nexus – go to “My Tools” →Process new pledges (bulk) 4. Select your federal agency from the list that appears when you select the bulk method (usually just one, unless you have access to multiple agencies). 5. Click “Step 1 – Print all pledges listed below.” 6. Collect the pledge printouts from your printing device. Verify they are all there. 7. Click “Step 2 – Mark all Printed and Saved Pledges as Processed.” 8. Mail the pledge printouts to your federal agency’s payroll center—not to Intermountain CFC.

As noted in Figure 7 (above), payroll deduction pledges made via CFC Nexus are processed in a similar manner as payroll deduction contributions made using the three-part paper pledge form.

Conclusion

Thank you for serving as your federal agency’s CFC Manager in 2016. By following the steps outlined in this book, you will run a highly successful CFC drive at your federal agency, make friends along the way, and develop skills that will benefit you throughout your career in federal service. Most importantly you will change countless lives for the better—because you cared. Best wishes!