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LABOR RELATIONS



August 31, 2021

Mr. Brian J. Wagner
President
National Association of Postal
Supervisors
1727 King Street, Suite 400
Alexandria, VA 22314-2753

Dear Mr. Wagner:

As a matter of general interest, the Postal Service will be revising Publication 530, *Combined Federal Campaign Operational Guidelines*. The purpose of the revisions is to update Office of Personnel Management (OPM) regulations and ethics rules governing the Combined Federal Campaign (CFC).

The update also addresses significant changes to the CFC structure, which includes:

- Methods of collecting and mailing pledges;
- Procedures that campaign workers must follow when managing, coordinating, and canvassing the campaign; and
- Strategies for running a campaign under the new ethics rules and OPM regulations.

Please find enclosed a copy Publication 530, one with and one without revisions, for your review.

Please contact Bruce Nicholson at extension 7773 if you have questions concerning this matter.

Sincerely,

A handwritten signature in blue ink, appearing to read "David E. Mills", with a stylized flourish extending to the right.

David E. Mills
Director
Labor Relations Policies and Programs

Enclosures

Introduction

IMPORTANT: During public health emergencies, protocols and precautions to ensure employee and customer safety may be required. Whenever similar Postal Service safety precautions are in effect, CFC operations shall follow all Postal Service policies for meetings, canvassing, and campaign events and activities. If circumstances require social distancing, activities such as CFC planning, team meetings, events, activities, and canvassing should comply with the following protocol: Webcasts for events, making remote electronic presentations, using public announcement systems to make CFC-related standup talks, making a phone call or email is recommended rather than in-person contact.

This guide is for Combined Federal Campaign (CFC) administrators, campaign managers, campaign coordinators, and keyworkers. Employees in these roles play a key role in the success of our annual campaign. Whether a campaign worker is new to the CFC or one who has worked the campaign for years, this document is a guide in best practices needed to perform and run a successful campaign.

This publication summarizes recent changes to regulations governing the CFC and to the structure of the CFC. The Office of Personnel Management (OPM) made needed improvements, streamlined ways to give, and improved CFC's online presence. This modernized the CFC, making pledging easier for employees, and making campaign tasks simpler. All a campaign worker needs to do is to put the improved features of the CFC into action for their campaign.

A well-run campaign requires good planning, great communication, optimizing time, resources, personnel, and technology. Our objectives for the postal CFC are for all teams to run campaigns that:

- Increase awareness of the campaign.
- Ensure every employee has the opportunity to participate in the CFC.
- Increase the number of overall CFC annual contributions.
- Increase the number of payroll deduction donations.
- Educate employees about use of the mobile app and website for donations.
- Follow current campaign fundraising regulations.

The recent changes in the CFC reflect trends in fundraising. Charitable giving by individuals has declined steadily since 2000. In 2011, OPM formed the CFC-50 Commission to explore ways to modernize the campaign and reverse the decline. The commission produced numerous recommendations for changes to regulations and policies. In 2012, they submitted their recommendations for federal approval, and in 2017, the new policies took effect. Page 3 presents a summary of the changes to policies, regulations, and the CFC.

Regarding Content in This Document

Specific Language in This Document

When this document cites a federal regulation, application of a law, or a requirement of postal policy, the word “**shall**” indicates this is a **requirement** and not merely a recommendation. When the word “**shall**” is used, the action specified is **required**, in order to comply with federal laws or regulations and to comply with postal policies.

Policies and Regulations

This document cites policies and regulations from both federal and postal sources. The content provides general guidelines, rather than a complete guide, so if in doubt about the right way to run a CFC campaign—while still maintaining compliance with all federal and postal regulations—please consult the following resources:

- **USPS Ethics** – For specific questions regarding which activities or events are compliant with postal ethics rules, please reach out to an ethics official at Ethics.Help@usps.gov.
- **5 CFR 950** – Regulations for the campaign, including many of the CFC Commission's recommendations, appear in the Code of Federal Regulations (CFR) in CFR Title 5, Chapter I – Office of Personnel Management – Subchapter B – Civil Service Regulations, Part 950 – *Solicitation of Federal Civilian and Uniformed Personnel for Contributions to Private Voluntary Organizations* (5 CFR 950). Postal Publication 530 (this document) cites policy from 5 CFR 950.
- Employee and Labor Relations Manual (ELM) section 617 – *Combined Federal Campaign Program*.
- Please take time to visit the references cited in this document for more information on OPM's role in the CFC and other policies governing the CFC. For other questions about the CFC or postal policies regarding the CFC, please submit them to the USPS CFC email box at CFCUSPSHQ@usps.gov.

Recent Changes to the CFC

- **The overall structure of the CFC changed.** In 2017, CFC consolidated from 140 different campaigns into 36 geographic areas called CFC zones.
- **Online presence expanded and improved** with a new CFC online donor portal system, a rebranded website with 36 matching CFC zone websites, and a single official slogan.
- **OPM limited pledge methods** to online or paper payroll deduction, one-time contributions, or online-only recurring payments from credit or debit cards, and paper or electronic checks.
- **Volunteer hours count as contributions.** Donors can pledge their time to charities that indicate they accept it. The monetary value of pledged hours counts toward agency totals.
- **CFC no longer accepts cash.** While this prohibits cash and transactional contributions (any activity that exchanges goods or services for donation funds), no more cash means faster pledge processing, and reduces the risk of loss or inappropriate use of collected funds.
- **Paper pledge phase-out:** OPM set a goal of 90% online pledges for the 2020 season, with plans to phase out most paper pledges by 2023. Fewer paper pledges means fewer processing errors and shorter pledge processing time. Employees without computers can donate using mobile phones or tablets. A mobile donor app was tested in 2019 with nationwide release in 2020.
- **Postal CFC donors now use Employee Identification Numbers (EIN) for payroll deduction pledges.** To protect the confidentiality and privacy of postal employees' social security numbers, postal payroll developed a way to enable employees to use their EINs when making payroll deduction pledges. OPM designed postal-specific pledge forms with space for the EIN, and the online donor portal asks postal employees to enter EINs for payroll deduction when checking out. EINs by themselves or in isolation are considered to be non-sensitive personal identifiers. However, when combined with name or other personal identifiers, the aggregation or grouping with EIN becomes sensitive personal information and must be protected and safeguarded from unauthorized access, unauthorized disclosure and misuse.

Campaign workers, as a best practice, should explain this change to prospective donors and give the new postal-specific pledge forms to those who do not wish to pledge online.

- **All donations made to CFC are now unrestricted.** This frees charities to use CFC donations without constraints. Donation funds can go where the charities need them most.
- **Donors must now designate a charity or charities listed in the catalogs when they pledge.**
- **Pledge collection centralized.** All federal, military, and postal paper and online pledges go to a Central Campaign Administrator (CCA), a contract firm, for processing. Pledge data from the online donor portal system goes straight to the CCA, and campaign workers mail paper pledges to the CCA. The CCA then transmits processed payroll deduction pledge information to agencies' payroll departments. The CCA answers donors' and campaign workers' questions through the CFC help line, **1-800-797-0098**.
- **Database changes centralized updates.** OPM coordinates with CFC Zone staff to collect updated department, agency, and office (DAO) data for unit and team database updates, record changes, closures, additions, or corrections; or HQ ELT/VP team changes, deletions, additions, or corrections. OPM announces the update deadline and provides a master list to CFC Zones for collection of changes each year, in order for the data corrections to reach the CCA to update for the upcoming season. CFC campaign managers and coordinators shall provide any database changes to their CFC Zone staff before the annual deadline.

Combined Federal Campaign

About the CFC: Scope, Administration, and Regulation

The CFC is the charitable fundraising program established and administered by the director of OPM. The Office of CFC Operations at OPM oversees the CFC program.

The CFC consolidates all agency charitable giving campaigns into one annual event, eliminating duplication of effort and reducing individual agency costs. The CFC is the only authorized solicitation of employees in the federal or postal workplace conducted on behalf of national, international, and local charities.

CFC invites agency heads to chair their agency's campaign. This invitation arrives in late spring. Every year the local CFC invites the Postmaster General (PMG) to serve as chair. Leadership recommends a vice chair from the executive leadership team (ELT). The PMG acknowledges the vice chair.

OPM provides regulation and administration for the campaign.

The CFC was established by Executive Order No. 12353, *Charitable Fundraising*, March 23, 1982, and it is administered by the director of OPM. The director of OPM has authority to audit, investigate, and report on the administration of any campaign. The director also has power to resolve reported issues and assess sanctions or penalties when an organization or individual participating in the campaign acts out of compliance with regulations (5 CFR 950.503).

The director of OPM determines actual yearly CFC start and end dates. These dates sometimes vary from the regulation, which states that the yearly campaign can run from September 1 through January 15.

Every federal agency and the Postal Service shall conduct a yearly campaign in accordance with 5 CFR 950.102. Agency heads cannot cancel the campaign for their organization during the announced solicitation period without written approval from the director of OPM.

No other monetary solicitation on behalf of charitable organizations shall take place in the federal, military, or postal workplace outside the CFC, with the following exceptions:

- Federal agencies and the Postal Service shall provide information about the CFC to new employees at orientation. New employees may make pledges within 30 days of their start date, if hired outside the actual campaign period.
- The director of OPM may grant permission for solicitations of federal or postal employees, outside the CFC, in support of victims in cases of emergencies and disasters.
- The regulations do not apply to federal agency head or PMG-approved internal solicitations for organizational support or for the benefit of welfare funds for postal employees. An example of approved solicitations would be the Employee Social and Recreational Fund.
- The regulations also do not apply to postal community service activities outside of the CFC. These activities shall obtain approval and follow the Community Service Activities Policy (CSAP) guidelines in the Administrative Support Manual. Additional approved activities outside of the CSAP process include USPS Operation Santa®; blood, plasma, bone marrow drives; and the annual National Association of Letter Carriers (NALC) Food Drive.

Privacy, Confidentiality and Integrity of CFC Documents and Records containing Personally Identifiable Information (PII)

Personally Identifiable Information (PII) – refers to information which can be used to distinguish or trace an individual's identity, such as their name, employee identification number (EIN), social security number (SSN), biometric records, etc. alone or when combined with other personal or identifying information that is linked or linkable to a specific individual, such as date and place of birth, name, etc. Some forms of PII are sensitive as standalone data elements (examples include, but are not limited to, SSN, driver's license or state ID number, passport number or financial account number).

The **Privacy Act of 1974**, 5 U.S.C. § 552(a), applies to all Postal Service data maintained in a Privacy Act System of Records (SOR), that also contain personal information and records that can be retrieved by personal identifiers. SOR USPS 100.400, Personnel Compensation and Payroll Records, supports all necessary compensation and payroll activities and related management functions, such as payroll deductions for CFC donors. The confidentiality and integrity (accuracy) of Privacy Act data must be protected and safeguarded at all times. Similarly, the confidentiality of CFC related documents, forms, written communication and verbal communication that contain or use PII must be protected and safeguarded.

Helpful Hints

- Be aware of your surroundings when discussing or displaying PII.
- Encrypt electronic files that contain PII.
- Minimize the inclusion of PII in written and verbal communications.
- Secure sensitive documents that contain PII in locked cabinets or drawers.
- Send PII only to those who need to know the information to perform their duties.

All campaign workers shall handle donor information under the guidelines, laws, policies, rules, and regulations that apply to the collection, use, authorized disclosure, storage, retention and disposal of PII. The failure of agencies, including the Postal Service, to protect contributors' personal information from unauthorized access, unauthorized disclosure and misuse, may lead to permanent expulsion from the CFC.

In order to maintain the confidentiality of CFC donor records and comply with the requirements listed above, CFC workers must:

- Never request or disclose any personal information about individual donor participation or amounts pledged.
- Never forward, misuse, or otherwise disclose name and address information that employees provide.
- Never retain file copies of pledges (online or paper forms) from a past campaign for more than seven months from the end date of that campaign.
- Never share any CFC documents containing PII with anyone outside a CFC Team, and limit sharing of information about donors only to CFC Team personnel who need to know the information to perform their duties.

Storage and disposal of PII:

As with any other types of sensitive or sensitive-enhanced information, store documents and forms containing PII securely in a locked drawer or file cabinet in accordance with established Postal Service policies and procedures. Dispose of documents containing PII using approved secure document destruction methods, such as cross-cut shredding, when the information is no longer needed if the information is not subject to a legal hold and the retention period has expired in accordance with Handbook AS-805 *Information Security* section 3-5.8.3.

Resources containing guidelines, policies and procedures to protect and secure Sensitive PII pertaining to CFC donors:

- HERO courses on privacy and information security or cybersecurity.
- PUB 550 For the Record - An Employee's Guide to The Freedom of Information Act and The Privacy Act of 1974: <https://blue.usps.gov/cpim/ftp/pubs/pub550.pdf>.
- PUB 453 Respect and Protect: Our Privacy Mission Guidelines for Privacy: <https://blue.usps.gov/cpim/ftp/pubs/pub453.pdf>
- USPS Privacy Policy: www.usps.com/privacypolicy
- USPS Handbook AS-353 Guide to Privacy, the Freedom of Information Act, and Records Management: <https://about.usps.com/handbooks/as353.pdf>
- USPS Handbook AS-805 Information Security: <https://about.usps.com/handbooks/as805.pdf>
- USPS Handbook AS-805-C Information Security Policy for all Personnel: <https://about.usps.com/handbooks/as805c.pdf>

Prohibition of Coercive Activity

Avoiding Coercive Activity

Any action that inhibits or appears to inhibit free choice of employees to contribute to the CFC is prohibited by 5 CFR 950.108 and Postal Service policy. Therefore:

- Supervisors (or others in supervisory chain of command) shall not coerce employees to pledge.
- Employee's supervisor shall not inquire about individual participation or amount pledged.
- 100 percent participation shall not be required.
- Personal dollar goals and quotas shall not be established.
- Lists of nonparticipating employees shall not be developed or used.
- Participation lists shall not be provided or used for any purpose other than preparing paper pledge report summary sheets for mailing to the Central Campaign Administrator (CCA) for processing. In addition, provision and use of participation lists must be limited only to CFC Team personnel who need to know the information to perform their duties.
- Individual contribution information shall not be used as a factor in employee performance evaluations.

How the CFC Works

Figure 1 below summarizes the structure of the CFC: Who governs the CFC program; who performs which roles; and how information, work, and pledges flow through the CFC program. The program's structure changed significantly in 2017, after the CFC-50 Commission program changes were incorporated into 5 CFR 950. The following pages describe this new structure in detail.

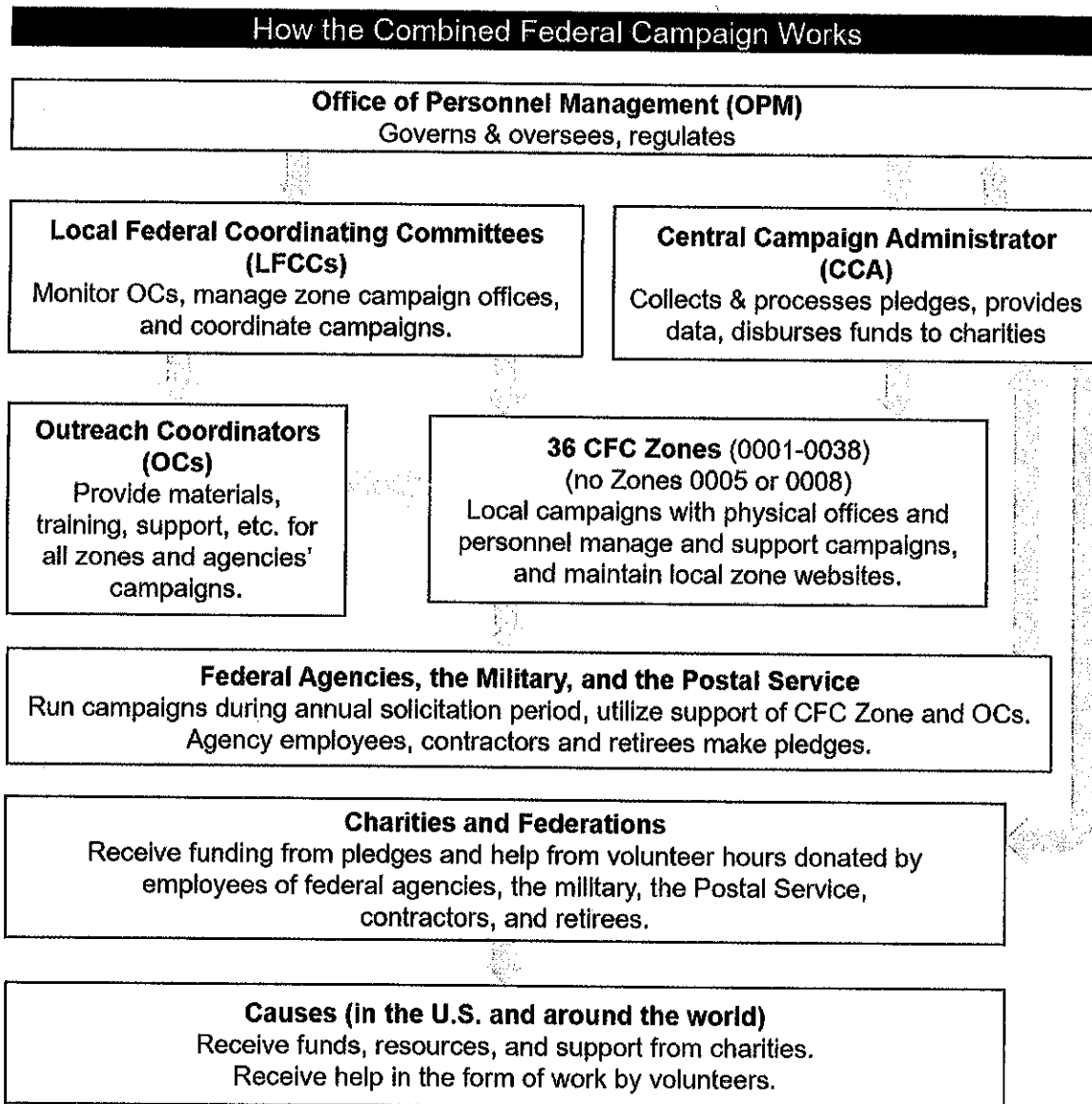


Figure 1

Local Federal Coordinating Committees Govern the CFC

Local Federal Coordinating Committees

- **A Local Federal Coordinating Committee (LFCC)** governs each CFC zone. Under the oversight of OPM, each LFCC consists of at least three members, ideally representing a cross-section of agencies, personnel types, and locations. Members come from local federal interagency organizations, federal agencies, and the Postal Service. Representatives of employee unions, or employee groups in that CFC zone may participate but require OPM approval.
- Each LFCC's goal is to ensure that—to the extent reasonably possible—every employee has the opportunity to participate in the CFC.
- The LFCC serves as the central source of information about the CFC among federal or postal employees in their zone. LFCCs select the Outreach Coordinator companies that implement the CFC, provide marketing, event and activity support, employee training, local charity education, and produce and distribute campaign materials for CFC zones.

How CFC Zones Work

- **Each zone** has both a physical complement at CFC zone offices and an electronic presence through a dedicated CFC zone website.
- **LFCCs** lead CFC zone offices staffed by LFCC members, hired employees, and loaned executives. LFCCs monitor the work of Outreach Coordinators, administer the day-to-day work of their CFC zone offices and personnel, and conduct the campaign.
- **Outreach Coordinators (OC)** are companies selected by the LFCCs to implement marketing, training, and logistics for the CFC in each zone. OCs support the CFC zone offices by providing localized charity lists, supplying print and electronic materials to each zone, and coordinating with charities in support of CFC events. OCs work in concert with the LFCCs on each zone's campaign. A single OC firm, selected through a bidding process, creates marketing materials with a unified brand. Materials include CFC website assets, and CFC branded, localizable imagery. All 36 CFC zones, federal, military, and postal can customize these materials for their campaigns.
- **The CFC zone offices and staff** manage day-to-day campaign tasks such as distributing campaign materials, training campaign teams, assisting federal or postal campaign teams by coordinating charities or event guests, or providing information at campaign events throughout the zone. OCs from CFC zone offices hold training events for campaign managers prior to the start of the yearly solicitation period, help Area, Region, and District campaign managers train campaign coordinators and keyworkers, and assist campaign managers with training keyworkers or finding guest charities or speakers for CFC events. Throughout the CFC solicitation period, CFC zone offices provide reports of local campaign results, keep federal and postal teams stocked with materials, provide marketing specialties to distribute to employees, and support the campaign. After the campaign, CFC zone offices collect and distribute periodic reports, distribute OPM's report of the season's final national numbers, and provide administrative services needed to close out the campaign.
- **The Central Campaign Administrator (CCA)** develops and maintains the CFC giving website, receives pledge data, and distributes funds to charities. The CCA also provides help to campaign workers and donors through its donor portal help line at 800-797-0098 or cfcgiving.opm.gov/contact.

Understanding the Structure of the New CFC Database

Prior to 2017, the CFC provided only summary totals to teams working the CFC. OPM and the CFC developed a new database to make reporting more complete, transparent, and available.

The database contains complete data across agencies down to unit level, individual charity, and with donors de-identified with anonymized ID numbers rather than PII. Data includes information about every unit across the country and data showing how the campaign is doing in each region, division, CFC zone, district, unit, or ZIP Code.

This section describes the content, organization, and sources of the data in the database. The data comes from information entered by employees when making pledges. The data then appears in reports sent out during the campaign. Campaign managers or campaign coordinators use this data from detailed campaign reports to see where to focus keyworkers' campaign canvassing efforts.

- Weekly or biweekly data for the campaign from CFC zone staff reports results from that zone. Data format varies from zone to zone as different OCs use different formats.
- Weekly data from the national postal campaign manager reports results from all zones in dashboard format, posts every week we receive data from OPM, and publishes to the postal CFC site for campaign worker access during the season. Reports sort and filter on various data fields – for example, a local zone by ZIP Code and unit. Viewing campaign progress at each facility, station, or office makes it easy to locate units that still need canvassing or follow-up.

CFC zones - CFC consolidated 140 campaigns into 36 CFC zones. Visit the OPM site at www.opm.gov and search "CFC zones" for a page that describes each zone, the counties included, and the old campaigns now within each zone.

The zones encompass counties and ZIP Codes. A four-digit zone number (0001-0038) identifies each CFC zone (zones 0005 and 0008 consolidated into other CFC zones). CFC zones do not align with postal geographic boundaries, so one postal location might communicate with CFC staff from multiple zones. Local zone contacts can supply a list of all ZIP Codes campaign workers can use to identify all units to canvass.

- The zone number sorts each pledge by its zone. The online donor portal automatically identifies the CFC zone when a donor enters their work ZIP Code.
- Paper pledges, as a best practice, must have the CFC zone number entered manually by donors or pre-printed for donors within that zone. Several CFC zone numbers may apply to one physical location, particularly if domiciled employees work in that unit. The next section describes in detail how to identify these CFC zone numbers and their correct unit codes.

Identify Local CFC Zone and Unit

To identify a local zone and unit WITHOUT access to a computer, use the work unit's ZIP Code (domiciled employees: use the direct manager's work ZIP Code and the name of the physical work unit (for example: "*Your City Post Office*"). Domiciled employees fall under the CFC zone and unit for the finance number of their manager and their manager's physical work unit).

The easiest way to locate this information WITH online access is to use the online donor portal. To locate a specific CFC zone number online:

- In a browser, navigate to <https://cfcgiving.opm.gov/welcome>.
- Locate the "Get Your CFC Zone News" search box.
- Enter the work unit ZIP Code in the search box and click search. A local CFC website for the zone will open in a new window.
- If the site does not list its CFC zone number, go to the OPM page of CFC zones (pg. 8), which lists the zones by number.

Unit codes are six-character alphanumeric codes preceded by the letters CFC and a colon (example: *CFC:1A23BC*), that identify each administrative organization at unit level. Unit codes identify each individual facility, office, station, or headquarters VP team within each postal geographic boundary, or headquarters.

Departments, agencies, and offices: The CFC organizes its database of federal agencies, military, and postal agencies in **DAO** order.

- **Department** identifies each separate federal, military or postal agency. **USPS is a department.**
- **Agency** identifies each administrative unit. Postal Service employees roll up into the Agency to either their Area or Regional VP. Headquarters (HQ) and HQ-related employees roll up to their HQ VP, PMG's Office, Chief Postal Inspector (for US Postal Inspection Service employees), Office of the Inspector General (OIG), and General Counsel and Executive VP.
- **Office** identifies each physical or logical unit (office, facility, station, or HQ teams reporting up to their HQ Agency) in the country. Each has its own six-digit alphanumeric code, for example: *CFC:B2C3A1*.

How donors use this information: Donors enter USPS as "Department"; their CFC zone number if using paper pledge forms; their Area or Regional VP, HQ VP or executive office (see "Agency" above) as "Agency"; the unit code for their facility, office, or station as "Office"; provide their name and contact information (personal or work email or phone required) in the event of a question from the CCA processor; and, only if making payroll deduction pledges, enter their EIN (or SSN for contractors or retirees).

Best Practices: When instructing employees how to donate, campaign workers should provide the CFC zone number for the employee's ZIP Code (or employees' manager's ZIP Code if HQ domiciled) and their correct unit number; and explain that email (or phone) information will not be shared but is needed for a way for the processor to contact the donor in the event of an error or issue.

For further questions, contact the district, region, or division CFC campaign manager, or contact the national HR campaign manager at CFCUSPSHQ@usps.gov.

How the Postal Service CFC Works

Overview

Figure 2 below is a summary of the roles and responsibilities of the different groups of postal employees necessary for a successful CFC. The following pages describe each group in detail.

USPS Combined Federal Campaign – Roles and Responsibilities
HQ National Human Resources – has functional responsibility for campaign. A national postal CFC campaign manager coordinates nationwide campaign, provides training, information, support & reports; recruits HQ loaned executive and HQ campaign manager.
CFC Chair for USPS – The Postmaster General (PMG) – Announces and promotes campaign; requests leadership identify campaign managers; appears in annual CFC video.
CFC Vice Chair for USPS – an appointed postal Vice President – Sponsors HQ campaign; provides other campaign support and communication.
Vice Presidents – Identify campaign managers (email names to CFC USPS HQ), provide campaign support by encouraging recruiting of campaign managers.
District Managers and Senior Plant Managers – Identify district and large facility campaign managers (email names to CFC USPS HQ), provide campaign support by recruiting campaign coordinators and keyworkers.
Postal leadership (all levels) – Support efforts by recommending motivated campaign workers and providing opportunities for events; include CFC in standup talks.
Loaned executives – Work with local CFC Zone offices to support the CFC efforts in federal agencies, military, or postal – typically loaned outside own agency for season.
Postal campaign committees – Brainstorm and implement campaign strategies; provide help and personnel for events, and support the campaign manager.
Postal campaign managers – Manage local campaigns and events, provide material, training, and support to keyworkers.
Campaign coordinators – Run local campaigns and events, provide material, training, support to keyworkers, and process and mail pledges.
Keyworkers – Help out at local events; Invite all Postal Service employees to participate and pledge, collect and check pledge forms, display and distribute campaign materials, thank employees, and follow up with a second invitation.
HR (HQ and Field) Onboarding teams – Include CFC information in onboarding sessions.

Figure 2: USPS CFC Roles and Responsibilities

Postal CFC Roles, Responsibilities, and Timeline

This section describes roles and responsibilities of postal employees involved in the CFC in detail. This narrative describes who does what along the timeline for the yearly campaign.

National Human Resources

Throughout the year - National Human Resources at Headquarters oversees the Postal CFC. An employee in the role of national campaign manager works year-round to:

- Coordinate with OPM.
- Plan the next season's campaign.
- Coordinate the Postmaster General's CFC communication efforts.
- Coordinate solicitation, identification, and training of campaign managers from each Area, Region, and District across the country.
- Coordinate with the Law Department including Ethics, the Privacy and Records Management Office, Brand and Policy, Corporate Communications, and Labor Relations, where guidance on compliance, standards, and other relevant issues is required.
- Coordinate solicitation for and selection of a loaned executive from HQ for the local CFC zone.
- Coordinate solicitation for and selection of a campaign manager for the HQ CFC, collaborate with the HQ campaign manager, and coordinate the HQ CFC campaign kickoff and HQ CFC events.
- Produce CFC content for Postal Service publications and publicity efforts.
- Monitor and inform leadership and campaign workers on progress of the national campaign.
- Manage the CFC USPS HQ email box and answer postal CFC questions.
- Update Publication 530 – *Combined Federal Campaign Operational Guidelines*.

Area, Region, and District Managers

Area, Region, and District managers shall identify or recruit and select campaign managers for each Area, Region, and District. Campaign managers have functional responsibility for each Region's, Division's, and District's campaign. A best practice is to identify or recruit and select campaign managers for the upcoming CFC season **as early as May (but no later than June)** each year. Early recruiting gives the campaign managers a timely start on a campaign plan and time to recruit qualified campaign coordinators (formerly called team leaders) and keyworkers, who receive training in late August before the campaign begins.

When considering candidates for campaign managers, select employees who are:

- Well organized in their workplace and good at time management.
- Able to plan and execute projects with a strict timeline from start to finish.
- Personable, engaging, and capable of supervising and delegating work to others.
- Skilled at communicating with employees, leadership, and individuals across all functions.
- Passionate about charitable giving.
- Able to devise creative solutions to problems.
- Capable of meeting compliance and legal requirements.

Area, Region, and District Campaign Managers

For campaign managers and those interested in becoming campaign managers: Future CFC seasons may have dates that vary from guidance in this document; over the 2018 and 2019 seasons, the start dates were near the 10th of September.

As a best practice, we recommend that prospective campaign managers start talking to leadership as early as May about the campaign. Those who desire to work as a campaign manager for their Region, Division, or District should talk to their managers early.

For designated perennial campaign managers (those who work every season), May through July is the time to draft plans for the upcoming campaign and share them with local leadership.

Campaign managers must cultivate a working relationship with local leadership and communicate how they intend to integrate CFC messaging into day-to-day work in the form of standup talks, brainstorm other innovative messaging with leadership, and involve leadership in campaign planning. For specific questions regarding which activities or events are compliant with postal ethics rules, campaign managers shall contact an ethics official at Ethics.Help@usps.gov.

Area, Region, and District campaign managers plan and manage the CFC within their respective areas and districts.

In this role, they:

- Work with leadership to identify campaign committee members.
- Serve as liaisons with CFC representatives.
- Establish campaign objectives and steering committees.
- Present leadership a campaign brief, campaign calendar, and campaign plan early in the CFC season.
- Identify existing campaign coordinators or recruit new campaign coordinators for Area, Region, and District facilities, stations, and offices.
- Communicate with their facility, station, or office leadership weekly during the campaign, and ask them for help assigning the number of keyworkers (ideally, 1 per 15-25 employees) needed to run a successful campaign.
- Monitor and manage campaigns, and monitor campaign progress and news on the CFC National USPS Campaign Workers site managed by the national postal CFC campaign manager.
- Provide guidance, materials, and support for campaign coordinators and keyworkers for facilities, stations, and offices within their Region, Division, or District.
- Leverage communication and electronic meeting technologies.

During the season, campaign managers receive information, training, and resources from the national Postal CFC campaign manager, who provides support, postal-specific materials, weekly online check-ins, and reports for each year's campaign.

Leadership awareness of the CFC and providing sufficient complement for part or full-time CFC campaign work during the season are keys to the campaign's success. Charitable giving industry reports' data shows that campaigns with leadership support experience higher participation rates.

Campaign Committees

Well-organized campaigns, particularly those with effective campaign committees, tend to have higher participation rates. Campaign committees are the driving force for organizing and implementing CFC

campaigns. From May to June, vice presidents appoint members of campaign committees under their oversight, and district managers appoint members of district campaign committees. The committees should include a chairperson, a campaign coordinator, management representatives from each major operating unit, and employees with past CFC experience.

Loaned Executives

The Postal Service supports the Loaned Executives (LE) program. LE are federal, military, or postal employees loaned to the campaign. LE typically work their assignment from CFC zone offices and support campaigns in agencies other than their own. This is a temporary assignment or detail for a period that runs from **July-August training, through the end of January**. With manager permission and at CFC request, details may be extended through March to help the local zone with post-campaign tasks.

LE program candidates should start talking to their managers about the program in **May or early June**. A best practice for LE candidates is to let managers know well in advance that they are interested in this development opportunity. Annual solicitations for LEs, as a best practice, should go out in mid-June in order to allow time for applications, interviews, and selection in time to attend intensive training at their local CFC zone office.

LEs help other federal agencies with CFC goals, training, event planning, publicity, and tracking campaign results. This program lowers overhead costs for each agency, which increases the funds available for charities. The exchange of ideas and CFC knowledge between agencies fuels engagement, provides LEs with invaluable development opportunities, and gives the LE an opportunity to give back to the community.

LEs work a regular 40-hour workweek schedule.

Area, Region, and District managers, when possible, should solicit for and select at least one LE per district to assist their local CFC zone. CFC pays for training. LE salary and out-of-pocket transportation expenses are paid out of their postal finance number. Per diem and travel expenses are not paid.

Candidates for the LE program are mid-level EAS employees living within 50 miles of their work unit who have at minimum:

- The ability to assume significant responsibility.
- Strong organization skills.
- Good public speaking skills.
- Experience organizing and holding events.
- The ability to work effectively with volunteers and leadership from many different departments.
- The ability to finish assignments with tight deadlines.
- A passion for the CFC or an interest in charitable fundraising.
- Good skills in communication and electronic meeting technologies.

National Chair

Typically, in May, CFC leadership invites the PMG to chair the postal national campaign. The PMG as national chair typically:

- Announces the national campaign and directs vice presidents to identify campaign managers and in turn, to direct district managers to identify campaign managers and submit their names to the director of National Human Resources.
- Acknowledges an executive to serve as the national vice chair.
- Supports the postal campaign through communications in holiday or other postal videos or memos, etc.
- Sends a memo summarizing national postal efforts after the end of the campaign.

National Vice Chair

The national vice chair, typically a vice president at HQ, normally monitors, promotes, and supports the campaign. In this role, **from late May through the end of the campaign**, he or she may be asked to:

- Establish HQ campaign goals and form a campaign committee in collaboration with the HQ campaign manager and national postal CFC campaign manager.
- Support the HQ CFC through communications regarding events and other publicity efforts, including speaking engagements, videos or memos, etc.
- Promote the national campaign by providing communication to vice presidents regarding the national campaign, establishing Area, Region, and District campaign goals, and monitoring the campaign.

Campaign Coordinators

During July and early August, campaign managers identify or recruit and select **campaign coordinators** (formerly called team leaders) to run the postal CFC at facilities, stations, and offices. Typically, campaign coordinators collaborate with their district campaign manager and district campaign committees. CFC zone offices typically conduct campaign coordinator training during the last two weeks in August.

Campaign coordinators must:

- Work with campaign leadership to recruit keyworkers locally.
- Serve as liaisons with CFC representatives
- Distribute materials and information to campaign workers and ensure paper pledge forms are available for campaign workers or employees who request them.
- Communicate with their campaign managers weekly during the campaign and ask them for help assigning the number of keyworkers (1 per 15-25 employees) needed to run a successful campaign.
- Collect pledge information (pledge forms and donor-shared receipts of online pledges) and monitor that paper pledge forms are correctly prepared before mailing pledges to the CCA for processing.
- Conduct weekly check-in meetings with all keyworkers in their geographic jurisdictions.
- Leverage communication and electronic meeting technologies as needed for CFC activities.
- For specific questions regarding which activities or events are compliant with postal ethics rules, campaign coordinators shall contact an ethics official at Ethics.Help@usps.gov.

Keyworkers

Keyworkers, as the word implies, are the keys to the success of the CFC. Keyworkers are employee volunteers for the CFC. They are individuals who talk to employees to raise awareness and invite them to make pledges during the campaign. The postal CFC campaign's success depends on the keyworkers' positive attitude, level of engagement, enthusiasm, and their ability to interact well with coworkers.

Campaign managers and coordinators: as a best practice, **in July or early August**, identify or recruit and select keyworkers based on the criteria below. Keyworkers receive training from the CFC zone office in the two weeks prior to the campaign. Select keyworkers before the end of the second week of August.

The CFC recommends a ratio of one keyworker for every 15-25 employees to ensure that every facility, station, and office is covered. This ratio ensures keyworkers have time to complete both their assigned regular job and talk to employees about CFC. As the employee face of the CFC, keyworkers should be individuals who are passionate about the CFC or supportive of fundraising. During the solicitation period for the CFC, each keyworker's goals are to:

- Contact every postal employee within their assigned installation or installations two or more times during the solicitation period and encourage them to consider making a pledge to the CFC. (Note that campaign workers may not solicit pledges from contract employees; they may answer contractors' questions and, if asked, provide them information about making a pledge.)
- Raise awareness of the campaign and the charities for which the campaign provides support by providing information about the CFC, the link to the online charities list or a paper copy of the catalog, and sharing information about causes supported by CFC charities.
- Promote online pledging as a secure, easy alternative to the paper pledge form and provide paper pledge forms upon request.
- Provide employees with correct information about the steps of making pledges and walk employees through registering online if asked to do so.
- Check paper pledge forms for completeness, readability and correctness; keep CFC donor forms securely stored and out of public view to protect PII; and give completed pledge forms to their campaign coordinator or campaign manager every week for mailing.

HR Onboarding Teams (Headquarters and Field)

As stated in the regulations governing the CFC (5 CFR 950), federal agencies shall provide information about the CFC to new employees at orientation. This means that:

- Postal new employee orientation sessions must include information regarding the CFC and instructions for making a pledge. Onboarding packets must include an information sheet provided by National Human Resources and given to each new employee during onboarding. Onboarding teams can obtain the most current printable PDF version of the sheet by emailing CFCUSPSHQ@usps.gov.
- New employees may pledge using any pledge methods, online or using the paper pledge form, within the solicitation period. New employees hired outside the solicitation period have 30 days to pledge if their hire date falls between the day after solicitation period closes and July 1; new employees hired July 1 or later may pledge until the end of July. Employees hired after August 1, may pledge during the next CFC season.

Note: CFC donor portal closes for maintenance during the month of August.

Planning the local campaign

Best practices for a successful campaign

Campaign Managers

Start planning early – as early as May, when possible. To prepare for the upcoming CFC:

- Hold an initial planning meeting with the campaign committee. If there is no local campaign committee, consider forming one.
- Determine tentative dates for the local CFC kickoff and post-season awards ceremony.
- Establish a schedule and process for selecting campaign coordinators and keyworkers by talking with leadership first; then begin recruiting and selection.
- Contact the outreach coordinator for the local zone as early as possible to schedule training based on the number of locations, number of employees, and extent of instruction needed.
- Hold an event-scheduling meeting with the campaign committee; create an event calendar, and brainstorm event activities.
- Communicate with Ethics regarding activities planned for the season. For specific questions regarding which activities or events are compliant with postal ethics rules, please reach out to an ethics official at Ethics.Help@usps.gov.
- Coordinate publicity, stand-up talks, and other promotion for the campaign. Explore promotion channels such as local newsletters, “CFC Moment” slides for meeting decks, etc. Clear all publicity messaging through required local channels.
- Remember that CFC events and activities shall not promote or favor one particular charity over others.

As a best practice, campaign periods should match OPM's determined and published solicitations period start and end dates. To comply with OPM regulations, all CFC solicitations must end by the date determined and published by OPM. Keep in mind that the solicitation period may vary depending upon the year; typically from about the second week in September through the middle of January. Should OPM extend the date of the solicitation period, all postal campaigns shall run until the officially extended end date. This optimizes the time for solicitations throughout the entire campaign.

Campaign Committees

IMPORTANT: During public health emergencies, protocols and precautions to ensure employee and customer safety may be required. Whenever similar Postal Service safety precautions are in effect, CFC operations shall follow all Postal Service policies for meetings, canvassing, and campaign events and activities. If circumstances require social distancing, activities such as CFC planning, team meetings, events, activities, and canvassing should comply with the following protocol: Webcasts for events, making remote electronic presentations, using public announcement systems to make CFC-related standup talks, making a phone call or email is recommended rather than in-person contact.

During July and August, campaign committees should meet regularly to plan solicitation season events. Consider members for the campaign committee based on their experience planning and running special

events. Make the most of publicity and marketing and brainstorm creative and innovative ideas for activities. Recruit a technology-proficient individual to coordinate and facilitate events held remotely. Get an early start as a committee in order to design and clear events and activities through Ethics early, and get events and activity publicity out in advance.

Determine Local Complement

To ensure sufficient keyworker coverage (ideally, 1 keyworker per every 15-25 employees), a campaign manager or campaign coordinator's first task is determining the complement for each local campaign. An accurate complement count includes all career and noncareer employees currently in the database at each facility, station, and office in the geographic area the local campaign team is responsible for canvassing.

Campaign workers may canvass:

- All career and noncareer employees.
- Temporary employees: Please note that payroll deduction pledges for temporary employees end with their duty break; if they are reemployed after the break, they have the opportunity to resubmit their payroll deduction pledge. If they return from duty break after the solicitation period closes, they have the opportunity to repledge under the new hire rules within 30 days of reemployment between the end of the solicitation period and the end of July, or if reemployed after July 1, before August 1.

Campaign workers **must not** canvass contract employees. That said, contract employees **are allowed to voluntarily pledge**. If a contractor asks for help with information about the CFC or how to pledge, campaign workers may answer their CFC questions, provide the link to or a copy of the generic non-postal-specific pledge form, show them how to donate online or via paper form, and accept their paper pledges and checks.

Who can give through the CFC?				
Who can pledge using which method?	Online <small>opm.gov/ShowSomeLoveCFC</small>		Paper Pledge Form	
	Payroll Deduction or Annuity	Credit/Debit/ACH (one-time or recurring)	Payroll Deduction or Annuity	One-Time Check
Federal employees*	✓	✓	✓	✓
Federal retirees*	✓	✓	✓	✓
Federal contractors*	✗	✓	✗	✓

* can also pledge volunteer hours to CFC-participating charities that accept them.

Employee canvassing and CFC event attendance

Regulations specify that CFC events must be open to all employees. This applies whether the events are live visits with employees, online webcast presentations, intercom-broadcast standup talks, etc. OPM regulations regarding solicitation methods (5 CFR §950.502 (a)) state that:

Employee solicitations shall be conducted during duty hours using methods that permit true voluntary giving and shall reserve to the individual the option of disclosing any gift or keeping it confidential. Campaign kick-offs, victory events, awards, and other non-solicitation events to build support for the CFC are encouraged.

Please note that non-exempt employees and contractors may only participate off the clock or during authorized breaks.

Make the Local Campaign Visible

Publicize the campaign widely — and creatively. A well-thought-out and frequent publicity campaign is always important.

How to publicize your campaign:

- Cultivate leadership support for the season by contacting supervisors and managers well before the announced season starts.
- Distribute the PMG season announcement memo to all eligible employees, and coordinate preparation and distribution of local leadership endorsements. Send out weekly email bursts and place printed campaign updates in common areas.
- Provide leadership with frequent updates and material to present during stand-up talks and meetings with employees.
- Make use of CFC videos, websites, virtual charity fairs, presentations, and other resources. Use Zoom and other electronic communications methods to make the campaign visible. Where this is not possible, place printed campaign materials where employees can see the posters or banners, and where they can pick up informational flyers, cards, and Postal Service-specific pledge forms.
- Display localized CFC print materials (posters, campaign barometers, banners, etc.) in employee common areas and personal workspaces. Capture visiting postal customers who are also postal employees with displays in public areas; for example, a wall behind the clerks in a post office.
- Encourage management and union association participation in local kickoff and other local CFC events.
- Create and distribute a printed and electronic calendar of local CFC events.
- Acquire and distribute publicity videos and photos. Establish contacts, create a resource file, identify employees who have benefitted from CFC, and develop story ideas. Write promotional articles using the information gathered and submit for Area, Region, and District newsletters.
- Submit photos, proper release forms, articles regarding CFC events, and stories about employees who have benefitted from CFC, to the LINK staff for nationwide LINK coverage. Release forms are available through local communications managers.

Schedule Ethics Review Of CFC Events

Always clear event activities through [Ethics](#) 3-4 weeks prior to any CFC event.

Never assume a campaign activity is ethics-compliant; all are required to clear activities through Ethics before the event occurs.

Invite Pledges, and Collect and Process Paper Forms

Campaign coordinators and keyworkers are essential to CFC success because they are the individuals who invite employees to pledge, explain the different ways to contribute, assist with events, collect, check, and process paper pledges. More specifically, campaign coordinators and keyworkers:

- Contact employees as scheduled. Provide information about CFC causes, invite them to pledge to the campaign, and provide instructions on how and where to pledge.
- Explain how the payroll deduction pledge makes contributing a bigger pledge easier to afford by spreading the total over 26 pay periods.

Describe the advantages of online/mobile versus paper for payroll deduction pledges:

- Online payroll deduction donations made during the solicitation period will become effective immediately after the campaign end date. Employees who submit a paper payroll deduction form later in the campaign may see a delay before their deductions become effective. Encourage early payroll deduction pledges.
- Emphasize online pledging:
 - Pledges are secure and easy to make.
 - Payroll deduction pledges made online will not experience processing delays.
 - Pledge record is accessible any time 24/7/365; receipt for tax purposes provided on request.
 - Pledges made online this year can be loaded into next year's cart for easy repeat donation.
 - One-time online or mobile pledges are processed immediately.
- Point out the drawbacks of paper pledges:
 - Must be mailed and take time to process.
 - Require filling out a new form every season.
 - Require making and keeping a paper copy as a record.
 - Have a higher chance of errors through manual completion and processing.
- Verify the accuracy of paper pledge forms by checking legibility, spelling, unit code, and CFC Zone number. **For payroll deduction pledges only**, check that total and payroll period amounts tally correctly, and the correct employee ID number (EIN) is entered. Contact local HR if employee does not know or campaign worker cannot look up employee's EIN.
- Account for and securely store paper pledge forms before mailing (or handing off to team member assigned to prepare a pledge report form and mail) the processed forms to the CCA every week.
- Honor the privacy and confidentiality of all participants and the amounts they have pledged.
- Review weekly status reports with the campaign manager or campaign coordinator, identify locations needing additional attention, and schedule revisits.

Group Events

IMPORTANT: During public health emergencies, protocols and precautions to ensure employee and customer safety may be required. Whenever similar Postal Service safety precautions are in effect, CFC operations shall follow all Postal Service policies for meetings, canvassing, and campaign events and activities. If circumstances require social distancing, activities such as CFC planning, team meetings, events, activities, and canvassing should comply with the following protocol: Webcasts for events, making remote electronic presentations, using public announcement systems to make CFC-related standup talks, making a phone call or email is recommended rather than in-person contact.

Group events can ramp up enthusiasm for the CFC and promote increased participation. Some ideas for activities that can be held during group events, whether they are held at the same physical location or over the intranet, include:

- Invite charities to speak or provide video. Contact local zone outreach coordinator to obtain charities.
- Describing how payroll deduction donations provide the opportunity to have a large impact for a low biweekly amount.
- Providing how-to pledge demonstrations and showing the ease and convenience of online or mobile giving.
- Demonstrating the mobile app for Samsung or Apple phones. The app, *CFC Giving*, is available for donors wishing to pledge using their phone.
- For those unable to pledge online or by mobile, supply paper pledge forms. Those who do have online access should be urged to donate online. Provide a PDF pledge form if requested.
- Wrap up every event with an invitation to pledge. Invite everyone at the event to consider pledging whatever amount they are comfortable giving. CFC campaign coordinators and keyworkers can describe how easy it was for them to pledge. Offer help to those who request it, at or after the event.
- Follow up individually after events with an email, phone call, meeting or IM, or How to Pledge card emailed or placed in their work area.

Individual Solicitation

If group solicitation is not feasible and to follow up after events:

- Plan the best time and place to contact each employee.
- Solicit contributions at all levels and on all tours.
- Personal stories about why the CFC is important are very effective.
- Ask the individual what causes they are passionate about.
- Keyworkers should have paper pledge forms available for employees who request them.
- Follow up when leaving paper pledge forms with employees to complete later or when leaving a form in the workplace for an absent employee.

Reporting

Weekly Status Reports

Keeping, processing, and sending paper pledge forms

Campaign coordinators and keyworkers process paper pledges each week during the campaign. Every campaign worker who handles paper pledge forms must:

- Check each form for legibility and accuracy. Forms with illegible information or errors will delay the funds reaching charities. Please take care to ensure that:
 - The employee's name is readable. If not, contact the employee and confirm.
 - The unit code is correct. To verify the employee's unit code (CFC ID number for each employee's work location), ask the CFC zone representative, or look it up on the donor portal (log in on the donor portal to look up the unit codes).
- If the pledge is a payroll deduction:
 - Does the total amount divide correctly by the number of pay periods? If not, contact the employee and correct.
 - Is the employee's EIN legible and correct? Verifying this may require checking with local HR, who can look up their EIN and confirm.
 - Has the employee provided contact information in the form of a work or personal email address? If employee has no email address, ask them to provide a phone number. The CCA uses contact information **only** to contact the employee regarding an issue processing their pledge.
- Keep (or make) two copies of the verified pledge form: one for the employee for their records and one for local campaign records.
- Treat all pledge forms as secure and confidential documents. Securely store all original forms and checks, and all copies of forms, out of public view, and in a locked cabinet or drawer.
- Copies of pledge forms kept for CFC team records must be discarded by cross-cut shredding once all pledges are processed by the CCA, or no later than seven months after the end date of that season's solicitation.
- Process and transfer forms weekly:
 - **Keyworkers:** Give completed, verified pledge forms and copies to coordinator or campaign manager once a week.
 - **Campaign managers or coordinators:** Prepare a summary page for pledges. Check each form. Place forms with attached checks in an envelope marked with local CFC zone number, and mail to the CCA.
GS-10 postage may only be used if agency policy allows it: Check with the campaign manager or email CFCUSPSHQ@usps.gov with questions.
- The final weekly paper pledge form mailing should take place by the solicitation period deadline announced by OPM. If the original deadline is extended, accept pledges until that official extended deadline.
- The CCA provides help to campaign workers and donors through its donor portal help line at 800-797-0098 or cfcgiving.opm.gov/contact. Select the appropriate number for donor or campaign worker status.

Rescinding Payroll Deduction Donation

CFC payroll deductions may be cancelled at any time, but this is the only change permitted outside the solicitation period. Employees wishing to cancel their deductions should contact their agency payroll office and request the allotment be cancelled.

Closing Out the Campaign

Critiquing Results

The campaign coordinator conducts a post-campaign assessment to compare results with objectives, analyze strengths and weaknesses, and recommend improvements. Campaign coordinators share these assessments with their campaign managers.

Recognizing Participants

Campaign coordinators write thank-you letters to keyworkers, other CFC assistants, and participating employees. Managers and postmasters conduct appropriate local award ceremonies to honor campaign managers, campaign coordinators, keyworkers, and contributors. Postal Service in-house publications announce recognition by the CFC.

Final Campaign Reports

OPM sends weekly reports to the HQ national postal campaign manager throughout the campaign, after the solicitation period closes and until the official cutoff date (the date at which disbursements to charities must begin). The national campaign manager analyzes these reports and posts them as a dashboard on the USPS National CFC Campaign Worker site. The site and reports are available to all campaign workers year-round.

Campaign workers who want access to the USPS National CFC Campaign Worker site can request access when prompted on their first visit to the site.

The final report for the campaign publishes as a LINK article at some point after the official cutoff date.

Introduction

IMPORTANT: During public health emergencies, protocols and precautions to ensure employee and customer safety may be required. Whenever similar Postal Service safety precautions are in effect, CFC operations shall follow all Postal Service policies for meetings, canvassing, and campaign events and activities. If circumstances require social distancing, activities such as CFC planning, team meetings, events, activities, and canvassing should comply with the following protocol: Webcasts for events, making remote electronic presentations, using public announcement systems to make CFC-related standup talks, making a phone call or email is recommended rather than in-person contact.

This guide is for Combined Federal Campaign (CFC) administrators, campaign managers, ~~team leaders~~campaign coordinators, and keyworkers. ~~It provides information to help you with all of the responsibilities connected with initiating, organizing, and implementing~~ Employees in these roles play a key role in the Postal Service success of our annual CFC drive campaign. Whether a campaign worker is new to the CFC or one who has worked the campaign for years, this document is a guide in best practices needed to perform and run a successful campaign.

This publication summarizes recent changes to regulations governing the CFC and to the structure of the CFC. The Office of Personnel Management (OPM) made needed improvements, streamlined ways to give, and improved CFC's online presence. This modernized the CFC, making pledging easier for employees, and making campaign tasks simpler. All a campaign worker needs to do is to put the improved features of the CFC into action for their campaign.

A well-run campaign requires good planning, great communication, optimizing time, resources, personnel, and technology. Our objectives ~~are to increase for the postal CFC~~ are for all teams to run campaigns that:

- Increase awareness of the campaign.
- Ensure every employee has the opportunity to participate in the CFC.
- Increase the number of overall CFC annual contributions ~~by postal employees and increase.~~
- Increase the number of payroll deduction donations.
- Educate employees about use of the mobile app and website for donations.
- Follow current campaign fundraising regulations.

The recent changes in the CFC reflect trends in fundraising. Charitable giving by individuals has declined steadily since 2000. In 2011, OPM formed the CFC-50 Commission to explore ways to modernize the campaign and reverse the decline. The commission produced numerous recommendations for changes to regulations and policies. In 2012, they submitted their recommendations for federal approval, and in 2017, the new policies took effect. Page 3 presents a summary of the changes to policies, regulations, and the CFC.

Regarding Content in This Document

Specific Language in This Document

When this document cites a federal regulation, application of a law, or a requirement of postal policy, the word “**shall**” indicates this is a **requirement** and not merely a recommendation. When the word “**shall**” is used, the action specified is **required**, in order to comply with federal laws or regulations and to comply with postal policies.

Policies and Regulations

This document cites policies and regulations from both federal and postal sources. The content provides general guidelines, rather than a complete guide, so if in doubt about the right way to run a CFC campaign—while still maintaining compliance with all federal and postal regulations—please consult the following resources:

- **USPS Ethics** – For specific questions regarding which activities or events are compliant with postal ethics rules, please reach out to an ethics official at Ethics.Help@usps.gov.
- **5 CFR 950** – Regulations for the campaign, including many of the CFC Commission's recommendations, appear in the Code of Federal Regulations (CFR) in CFR Title 5, Chapter I – Office of Personnel Management – Subchapter B – Civil Service Regulations, Part 950 – *Solicitation of Federal Civilian and Uniformed Personnel for Contributions to Private Voluntary Organizations* (5 CFR 950). Postal Publication 530 (this document) cites policy from 5 CFR 950.
- Employee and Labor Relations Manual (ELM) section 617 – *Combined Federal Campaign Program*.
- Please take time to visit the references cited in this document for more information on OPM's role in the CFC and other policies governing the CFC. For other questions about the CFC or postal policies regarding the CFC, please submit them to the USPS CFC email box at CFCUSPSHQ@usps.gov.

Recent Changes to the CFC

- **The overall structure of the CFC changed.** In 2017, CFC consolidated from 140 different campaigns into 36 geographic areas called CFC zones.
- **Online presence expanded and improved** with a new CFC online donor portal system, a rebranded website with 36 matching CFC zone websites, and a single official slogan.
- **OPM limited pledge methods** to online or paper payroll deduction, one-time contributions made, or online-only recurring payments from credit or debit cards, and paper or electronic checks.
- **Volunteer hours count as contributions.** Donors can pledge their time to charities that indicate they accept it. The monetary value of pledged hours counts toward agency totals.
- **CFC no longer accepts cash.** While this prohibits cash and transactional contributions (any activity that exchanges goods or services for donation funds), no more cash means faster pledge processing, and reduces the risk of loss or inappropriate use of collected funds.
- **Paper pledge phase-out:** OPM set a goal of 90% online pledges for the 2020 season, with plans to phase out most paper pledges by 2023. Fewer paper pledges means fewer processing errors and shorter pledge processing time. Employees without computers can donate using mobile phones or tablets. A mobile donor app was tested in 2019 with nationwide release in 2020.
- **Postal CFC donors now use Employee Identification Numbers (EIN) for payroll deduction pledges.** To protect the confidentiality and privacy of postal employees' social security numbers, postal payroll developed a way to enable employees to use their EINs when making payroll deduction pledges. OPM designed postal-specific pledge forms with space for the EIN, and the online donor portal asks postal employees to enter EINs for payroll deduction when checking out. EINs by themselves or in isolation are considered to be non-sensitive personal identifiers. However, when combined with name or other personal identifiers, the aggregation or grouping with EIN becomes sensitive personal information and must be protected and safeguarded from unauthorized access, unauthorized disclosure and misuse.

Campaign workers, as a best practice, should explain this change to prospective donors and give the new postal-specific pledge forms to those who do not wish to pledge online.
- **All donations made to CFC are now unrestricted.** This frees charities to use CFC donations without constraints. Donation funds can go where the charities need them most.
- **Donors must now designate a charity or charities listed in the catalogs when they pledge.**
- **Pledge collection centralized.** All federal, military, and postal paper and online pledges go to a Central Campaign Administrator (CCA), a contract firm, for processing. Pledge data from the online donor portal system goes straight to the CCA, and campaign workers mail paper pledges to the CCA. The CCA then transmits processed payroll deduction pledge information to agencies' payroll departments. The CCA answers donors' and campaign workers' questions through payroll deductions. As a CFC administrator, campaign manager, the CFC help line, **1-800-797-0098**.

Database changes centralized updates. OPM coordinates with CFC Zone staff to collect updated department, agency, and office (DAO) data for unit and team leader, or keyworker, you will play a key part in meeting these objectives.

A well-run CFC drive requires planning, ordering, and distributing material; training team leaders and keyworkers; and communicating at all levels. The degree of your involvement increases if you are working at the district or installation level, which is the major source of Postal Service contributions.

- database updates, record changes, closures, additions, or corrections; or HQ ELT/VP team changes, deletions, additions, or corrections. OPM announces the update deadline and provides a master list to CFC Zones for collection of changes each year, in order for the data corrections to reach the CCA to update for the upcoming season. CFC campaign managers and coordinators shall provide any database changes to their CFC Zone staff before the annual deadline.

Combined Federal Campaign

What Is About the CFC?: Scope, Administration, and Regulation

The CFC is ~~a consolidation~~the charitable fundraising program established and administered by the director of OPM. The Office of CFC Operations at OPM oversees the CFC program.

~~The CFC consolidates all agency fund-raising drives~~charitable giving campaigns into one annual event. ~~This combined effort eliminates, eliminating~~ duplication of effort and ~~reduces~~reducing individual agency costs. ~~This~~ The CFC is the only authorized ~~charitable fund-raising campaigns~~solicitation of employees in the federal ~~and/or~~ postal workplace. ~~The CFC is~~ conducted on behalf of national, international, and local ~~federations~~.charities.

CFC invites agency heads to chair their agency's campaign. This invitation arrives in late spring. Every year the local CFC invites the Postmaster General (PMG) to serve as chair. Leadership recommends a vice chair from the executive leadership team (ELT). The PMG acknowledges the vice chair.

OPM provides regulation and administration for the campaign.

The CFC was established by Executive Order No. 12353, *Charitable Fundraising*, March 23, 1982 (~~5 CFR 950~~), and it is ~~administered by the Director, Office of Personnel Management (OPM, and it is~~ administered by the director of OPM. The director of OPM has authority to audit, investigate, and report on the administration of any campaign. The director also has power to resolve reported issues and ~~assess sanctions or penalties when an organization or individual participating in the campaign acts out of compliance with regulations (5 CFR 950.503).~~

~~The campaign is conducted in the fall of each year from mid-September until December 15. The beginning date can be determined locally, but OPM regulations stipulate the December 15 ending date.~~

Where May Local Drives Be Held?

~~There is no prerequisite regarding the~~ The director of OPM determines actual yearly CFC start and end dates. These dates sometimes vary from the regulation, which states that the yearly campaign can run from September 1 through January 15.

~~Every federal employee population needed to establish or maintain a CFC. However, rather than establishing or maintaining small campaigns, OPM encourages mergers and expansions of campaigns to promote efficiency~~agency and economy. (5 CFR 950.103)

All established drives are assigned a 4-digit charity code used by postal facilities and federal agencies in counties within the assigned geographic boundaries. Contributions may be solicited only within these assigned geographic boundaries. ~~the~~

~~How~~ Are Boundaries Assigned?

~~The director of OPM establishes and maintains the official list of local drives and their geographic coverage, ensuring compliance with OPM regulations. The Postal Service may realign or expand CFC geographic boundaries by obtaining~~shall conduct a yearly campaign in accordance with 5 CFR 950.102. Agency heads cannot cancel the campaign for their organization during the announced solicitation period without written permissionapproval from the director of OPM.-

~~The local team leader must submit a written~~No other monetary solicitation on behalf of charitable organizations shall take place in the federal, military, or postal workplace outside the CFC, with the following exceptions:

- ~~Federal agencies and the Postal Service shall provide information about the CFC to new employees at orientation. New employees may make pledges within 30 days of their start date, if hired outside the actual campaign period.~~
- ~~The director of OPM may grant permission for solicitations of federal or postal employees, outside the CFC, in support of victims in cases of emergencies and disasters.~~
- ~~The regulations do not apply to federal agency head or PMG-approved internal solicitations for organizational support or for the benefit of welfare funds for postal employees. An example of approved solicitations would be the Employee Social and Recreational Fund.~~
- ~~The regulations also do not apply to postal community service activities outside of the CFC. These activities shall obtain approval and follow the Community Service Activities Policy (CSAP) guidelines in the Administrative Support Manual. Additional approved activities outside of the CSAP process include USPS Operation Santa®; blood, plasma, bone marrow drives; and the annual National Association of Letter Carriers (NALC) Food Drive.~~

Privacy, Confidentiality and Integrity of CFC Documents and Records containing Personally Identifiable Information (PII)

Personally Identifiable Information (PII) – refers to information which can be used to distinguish or trace an individual's identity, such as their name, employee identification number (EIN), social security number (SSN), biometric records, etc. alone or when combined with other personal or identifying information that is linked or linkable to a specific individual, such as date and place of birth, name, etc. Some forms of PII are sensitive as standalone data elements (examples include, but are not limited to, SSN, driver's license or state ID number, passport number or financial account number).

The Privacy Act of 1974, 5 U.S.C. § 552(a), applies to all Postal Service data maintained in a Privacy Act System of Records (SOR), that also contain personal information and records that can be retrieved by personal identifiers. SOR USPS 100.400, Personnel Compensation and Payroll Records, supports all necessary compensation and payroll activities and related management functions, such as payroll deductions for CFC donors. The confidentiality and integrity (accuracy) of Privacy Act data must be protected and safeguarded at all times. Similarly, the confidentiality of CFC related documents, forms, written communication and verbal communication that contain or use PII must be protected and safeguarded.

Helpful Hints

- Be aware of your surroundings when discussing or displaying PII.
- Encrypt electronic files that contain PII.
- Minimize the inclusion of PII in written and verbal communications.
- Secure sensitive documents that contain PII in locked cabinets or drawers.
- Send PII only to those who need to know the information to perform their duties.

All campaign workers shall handle donor information under the guidelines, laws, policies, rules, and regulations that apply to the collection, use, authorized disclosure, storage, retention and disposal of PII. The failure of agencies, including the Postal Service, to protect contributors' personal information from unauthorized access, unauthorized disclosure and misuse, may lead to permanent expulsion from the CFC.

In order to maintain the confidentiality of CFC donor records and comply with the requirements listed above, CFC workers must:

- Never request or disclose any personal information about individual donor participation or amounts pledged.
- Never forward, misuse, or otherwise disclose name and address information that employees provide.
- Never retain file copies of pledges (online or paper forms) from a past campaign for more than seven months from the end date of that campaign.
- Never share any CFC documents containing PII with anyone outside a CFC Team, and limit sharing of information about donors only to CFC Team personnel who need to know the information to perform their duties.

Storage and disposal of PII:

As with any other types of sensitive or sensitive-enhanced information, store documents and forms containing PII securely in a locked drawer or file cabinet in accordance with established Postal Service policies and procedures. Dispose of documents containing PII using approved secure document destruction methods, such as cross-cut shredding, when the information is no longer needed if the information is not subject to a legal hold and the retention period has expired in accordance with Handbook AS-805 *Information Security* section 3-5.8.3.

Resources containing guidelines, policies and procedures to protect and secure Sensitive PII pertaining to CFC donors:

- HERO courses on privacy and information security or cybersecurity.
- PUB 550 For the Record - An Employee's Guide to The Freedom of Information Act and The Privacy Act of 1974: <https://blue.usps.gov/cpim/ftp/pubs/pub550.pdf>.
- PUB 453 Respect and Protect: Our Privacy Mission Guidelines for Privacy: <https://blue.usps.gov/cpim/ftp/pubs/pub453.pdf>
- USPS Privacy Policy: www.usps.com/privacypolicy
- USPS Handbook AS-353 Guide to Privacy, the Freedom of Information Act, and Records Management: <https://about.usps.com/handbooks/as353.pdf>
- USPS Handbook AS-805 Information Security: <https://about.usps.com/handbooks/as805.pdf>
- USPS Handbook AS-805-C Information Security Policy for all Personnel: <https://about.usps.com/handbooks/as805c.pdf>

Prohibition of Coercive Activity

Avoiding Coercive Activity

Any action that inhibits or appears to inhibit free choice of employees to contribute to the CFC is prohibited by 5 CFR 950.108 and Postal Service policy. Therefore:

- Supervisors (or others in supervisory chain of command) shall not coerce employees to pledge.
- Employee's supervisor shall not inquire about individual participation or amount pledged.
- 100 percent participation shall not be required.
- Personal dollar goals and quotas shall not be established.
- Lists of nonparticipating employees shall not be developed or used.
- Participation lists shall not be provided or used for any purpose other than preparing paper pledge report summary sheets for mailing to the Central Campaign Administrator (CCA) for processing. In addition, provision and use of participation lists must be limited only to CFC Team personnel who need to know the information to perform their duties.
- Individual contribution information shall not be used as a factor in employee performance evaluations.

How for consideration of a new boundary to the CFC Works

Figure 1 below summarizes the structure of the CFC: Who governs the CFC program; who performs which roles; and how information, work, and pledges flow through the CFC program. The program's structure changed significantly in 2017, after the CFC-50 Commission program changes were incorporated into 5 CFR 950. The following pages describe this new structure in detail.

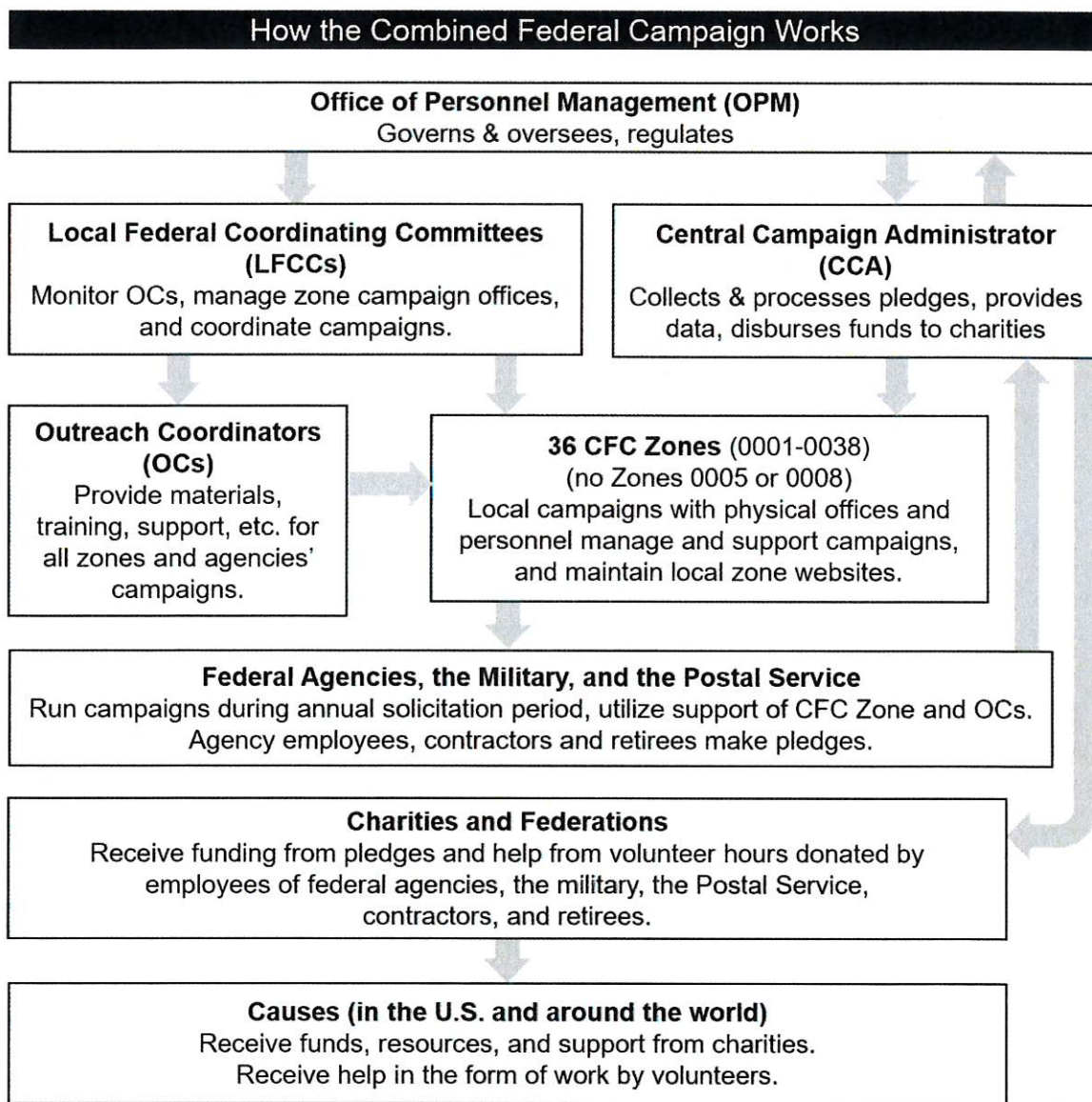


Figure 1

Local Federal Coordinating Committees Govern the CFC

Local Federal Coordinating Committees

- **A Local Federal Coordinating Committee (LFCC).** The LFCC is a group of federal officials) governs each CFC zone. Under the oversight of OPM, each LFCC consists of at least three members, ideally representing a cross-section of agencies, personnel types, and locations. Members come from local federal interagency organizations, federal agencies, and the Postal Service. Representatives of employee unions, or employee groups in that CFC zone may participate but require OPM approval.
- Each LFCC's goal is to ensure that—to the extent reasonably possible—every employee has the opportunity to participate in the CFC.
- The LFCC serves as the central source of information about the CFC among federal or postal employees in their zone. LFCCs select the Outreach Coordinator companies that implement the CFC, provide marketing, event and activity support, employee training, local charity education, and produce and distribute campaign materials for CFC zones.

How CFC Zones Work

- **Each zone** has both a physical complement at CFC zone offices and an electronic presence through a dedicated CFC zone website.
- **LFCCs** lead CFC zone offices staffed by LFCC members, hired employees, and loaned executives. LFCCs monitor the work of Outreach Coordinators, administer the day-to-day work of their CFC zone offices and personnel, and conduct the campaign.
- **Outreach Coordinators (OC)** are companies selected by the LFCCs to implement marketing, training, and logistics for the CFC in each zone. OCs support the CFC zone offices by providing localized charity lists, supplying print and electronic materials to each zone, and coordinating with charities in support of CFC events. OCs work in concert with the LFCCs on each zone's campaign. A single OC firm, selected through a bidding process, creates marketing materials with a unified brand. Materials include CFC website assets, and CFC branded, localizable imagery. All 36 CFC zones, federal, military, and postal can customize these materials for their campaigns.
- **The CFC zone offices and staff** manage day-to-day campaign tasks such as distributing campaign materials, training campaign teams, assisting federal or postal campaign teams by coordinating charities or event guests, or providing information at campaign events throughout the zone. OCs from CFC zone offices hold training events for campaign managers prior to the start of the yearly solicitation period, help Area, Region, and District campaign managers train campaign coordinators and keyworkers, and assist campaign managers with training keyworkers or finding guest charities or speakers for CFC events. Throughout the CFC solicitation period, CFC zone offices provide reports of local campaign results, keep federal and postal teams stocked with materials, provide marketing specialties to distribute to employees, and support the campaign. After the campaign, CFC zone offices collect and distribute periodic reports, distribute OPM's report

of the season's final national numbers, and provide administrative services needed to close out the campaign.

- **The Central Campaign Administrator (CCA)** develops and maintains the CFC giving website, receives pledge data, and distributes funds to charities. The CCA also provides help to campaign workers and donors through its donor portal help line at 800-797-0098 or cfcgiving.opm.gov/contact.

Understanding the Structure of the New CFC Database

Prior to 2017, the CFC provided only summary totals to teams working the CFC. OPM and the CFC developed a new database to make reporting more complete, transparent, and available.

The database contains complete data across agencies down to unit level, individual charity, and with donors de-identified with anonymized ID numbers rather than PII. Data includes information about every unit across the country and data showing how the campaign is doing in each region, division, CFC zone, district, unit, or ZIP Code.

This section describes the content, organization, and sources of the data in the database. The data comes from information entered by employees when making pledges. The data then appears in reports sent out during the campaign. Campaign managers or campaign coordinators use this data from detailed campaign reports to see where to focus keyworkers' campaign canvassing efforts.

- Weekly or biweekly data for the campaign from CFC zone staff reports results from that zone. Data format varies from zone to zone as different OCs use different formats.
- Weekly data from the national postal campaign manager reports results from all zones in dashboard format, posts every week we receive data from OPM, and publishes to the postal CFC site for campaign worker access during the season. Reports sort and filter on various data fields – for example, a local zone by ZIP Code and unit. Viewing campaign progress at each facility, station, or office makes it easy to locate units that still need canvassing or follow-up.

CFC zones - CFC consolidated 140 campaigns into 36 CFC zones. Visit the OPM site at www.opm.gov and search "CFC zones" for a page that describes each zone, the counties included, and the old campaigns now within each zone.

The zones encompass counties and ZIP Codes. A four-digit zone number (0001-0038) identifies each CFC zone (zones 0005 and 0008 consolidated into other CFC zones). CFC zones do not align with postal geographic boundaries, so one postal location might communicate with CFC staff from multiple zones. Local zone contacts can supply a list of all ZIP Codes campaign workers can use to identify all units to canvass.

- The zone number sorts each pledge by its zone. The online donor portal automatically identifies the CFC zone when a donor enters their work ZIP Code.
- Paper pledges, as a best practice, must have the CFC zone number entered manually by donors or pre-printed for donors within that zone. Several CFC zone numbers may apply to one physical location, particularly if domiciled employees work in that unit. The next section describes in detail how to identify these CFC zone numbers and their correct unit codes.

Identify Local CFC Zone and Unit

To identify a local zone and unit WITHOUT access to a computer, use the work unit's ZIP Code (domiciled employees: use the direct manager's work ZIP Code and the name of the physical work unit (for example: "*Your City Post Office*"). Domiciled employees fall under the CFC zone and unit for the finance number of their manager and their manager's physical work unit).

The easiest way to locate this information WITH online access is to use the online donor portal. To locate a specific CFC zone number online:

- In a browser, navigate to <https://cfcgiving.opm.gov/welcome>.
- Locate the "Get Your CFC Zone News" search box.
- Enter the work unit ZIP Code in the search box and click search. A local CFC website for the zone will open in a new window.
- If the site does not list its CFC zone number, go to the OPM page of CFC zones (pg. 8), which lists the zones by number.

Unit codes are six-character alphanumeric codes preceded by the letters CFC and a colon (example: *CFC:1A23BC*), that identify each administrative organization at unit level. Unit codes identify each individual facility, office, station, or headquarters VP team within each postal geographic boundary, or headquarters.

Departments, agencies, and offices: The CFC organizes its database of federal agencies, military, and postal agencies in **DAO** order.

- **Department** identifies each separate federal, military or postal agency. **USPS is a department.**
- **Agency** identifies each administrative unit. Postal Service employees roll up into the Agency to either their Area or Regional VP. Headquarters (HQ) and HQ-related employees roll up to their HQ VP, PMG's Office, Chief Postal Inspector (for US Postal Inspection Service employees), Office of the Inspector General (OIG), and General Counsel and Executive VP.
- **Office** identifies each physical or logical unit (office, facility, station, or HQ teams reporting up to their HQ Agency) in the country. Each has its own six-digit alphanumeric code, for example: *CFC:B2C3A1*.

How donors use this information: Donors enter USPS as "Department"; their CFC zone number if using paper pledge forms; their Area or Regional VP, HQ VP or executive office (see "Agency" above) as "Agency"; the unit code for their facility, office, or station as "Office"; provide their name and contact information (personal or work email or phone required) in the event of a question from the CCA processor; and, only if making payroll deduction pledges, enter their EIN (or SSN for contractors or retirees).

Best Practices: When instructing employees how to donate, campaign workers should provide the CFC zone number for the employee's ZIP Code (or employees' manager's ZIP Code if HQ domiciled) and their correct unit number; and explain that email (or phone) information will not be shared but is needed for a way for the processor to contact the donor in the event of an error or issue.

For further questions, contact the district, region, or division CFC campaign manager, or contact the national HR campaign manager at CFCUSPSHQ@usps.gov.

How the Postal Service CFC Works

Overview

Figure 2 below is a summary of the roles and responsibilities of the different groups of postal employees necessary for a successful CFC. The following pages describe each group in detail.

USPS Combined Federal Campaign – Roles and Responsibilities
HQ National Human Resources – has functional responsibility for campaign. A national postal CFC campaign manager coordinates nationwide campaign, provides training, information, support & reports; recruits HQ loaned executive and HQ campaign manager.
CFC Chair for USPS – The Postmaster General (PMG) – Announces and promotes campaign; requests leadership identify campaign managers; appears in annual CFC video.
CFC Vice Chair for USPS – an appointed postal Vice President – Sponsors HQ campaign; provides other campaign support and communication.
Vice Presidents – Identify campaign managers (email names to CFC USPS HQ), provide campaign support by encouraging recruiting of campaign managers.
District Managers and Senior Plant Managers – Identify district and large facility campaign managers (email names to CFC USPS HQ), provide campaign support by recruiting campaign coordinators and keyworkers.
Postal leadership (all levels) – Support efforts by recommending motivated campaign workers and providing opportunities for events; include CFC in standup talks.
Loaned executives – Work with local CFC Zone offices to support the CFC efforts in federal agencies, military, or postal – typically loaned outside own agency for season.
Postal campaign committees – Brainstorm and implement campaign strategies; provide help and personnel for events, and support the campaign manager.
Postal campaign managers – Manage local campaigns and events, provide material, training, and support to keyworkers.
Campaign coordinators – Run local campaigns and events, provide material, training, support to keyworkers, and process and mail pledges.
Keyworkers – Help out at local events; Invite all Postal Service employees to participate and pledge, collect and check pledge forms, display and distribute campaign materials, thank employees, and follow up with a second invitation.
HR (HQ and Field) Onboarding teams – Include CFC information in onboarding sessions.

Postal CFC Roles, Responsibilities, and Timeline

This section describes roles and responsibilities of postal employees involved in the CFC in detail. This narrative describes who does what along the timeline for the yearly campaign.

National Human Resources

Throughout the year - National Human Resources at Headquarters oversees the Postal CFC. An employee in the role of national campaign manager works year-round to:

- Coordinate with OPM.
- Plan the next season's campaign.
- Coordinate the Postmaster General's CFC communication efforts.
- Coordinate solicitation, identification, and training of campaign managers from each Area, Region, and District across the country.
- Coordinate with the Law Department including Ethics, the Privacy and Records Management Office, Brand and Policy, Corporate Communications, and Labor Relations, where guidance on compliance, standards, and other relevant issues is required.
- Coordinate solicitation for and selection of a loaned executive from HQ for the local CFC zone.
- Coordinate solicitation for and selection of a campaign manager for the HQ CFC, collaborate with the HQ campaign manager, and coordinate the HQ CFC campaign kickoff and HQ CFC events.
- Produce CFC content for Postal Service publications and publicity efforts.
- Monitor and inform leadership and campaign workers on progress of the national campaign.
- Manage the CFC USPS HQ email box and answer postal CFC questions.
- Update Publication 530 – *Combined Federal Campaign Operational Guidelines*.

Area, Region, and District Managers

Area, Region, and District managers shall identify or recruit and select campaign managers for each Area, Region, and District. Campaign managers have functional responsibility for each Region's, Division's, and District's campaign. A best practice is to identify or recruit and select campaign managers for the upcoming CFC season **as early as May (but no later than June)** each year. Early recruiting gives the campaign managers a timely start on a campaign plan and time to recruit qualified campaign coordinators (formerly called team leaders) and keyworkers, who receive training in late August before the campaign begins.

When considering candidates for campaign managers, select employees who are:

- Well organized in their workplace and good at time management.
- Able to plan and execute projects with a strict timeline from start to finish.
- Personable, engaging, and capable of supervising and delegating work to others.
- Skilled at communicating with employees, leadership, and individuals across all functions.
- Passionate about charitable giving.
- Able to devise creative solutions to problems.
- Capable of meeting compliance and legal requirements.

Area, Region, and District Campaign Managers

For campaign managers and those interested in becoming campaign managers: Future CFC seasons may have dates that vary from guidance in this document; over the 2018 and 2019 seasons, the start dates were near the 10th of September.

As a best practice, we recommend that prospective campaign managers start talking to leadership as early as May about the campaign. Those who desire to work as a campaign manager for their Region, Division, or District should talk to their managers early.

For designated by the director of OPM to conduct the CFC in a particular community perennial campaign managers (those who work every season), May through July is the time to draft plans for the upcoming campaign and share them with local leadership.

~~The LFCC will review the request and forward it to the director of OPM, who may agree to modify the geographic area. If the area is modified, the director of OPM notifies: (1) the LFCC and affected locations of the new boundaries; (2) the Human Resources Shared Service Center (HRSSC) for processing of the new CFC sites' finance numbers and charity codes.~~

Privacy Act and Coercion Restrictions

The Privacy Act

The Privacy Act of 1974 (5 U.S.C. 552a), as amended, applies to all Postal Service communications, written and verbal. To ensure employee privacy, the following actions are prohibited:

- Requesting or providing information about individual participation or amounts pledged.
- Forwarding an employee's name to designated agencies when the "No" box is checked on the pledge card.
- Misusing name and address information that employees provide to designated agencies.
- Retaining copies of payroll deduction pledge cards for more than 6 months.

The failure of designated agencies to protect contributors' personal information may lead to permanent expulsion from the CFC.

Restrictions on Coercion

Any action that inhibits free choice, or appears to inhibit free choice, of employees to contribute to CFC is prohibited. The Code of Federal Regulations (5 CFR 950.108) and Postal Service policy prohibit the following:

- Soliciting of employees by their supervisors or someone in the supervisory chain of command.
- Inquiring about individual participation or amount pledged by an employee's supervisor.
- Requiring 100 percent participation.
- Establishing personal dollar goals and quotas.
- Developing or using lists of nonparticipating employees.
- Providing or using participation lists for reasons other than to collect and forward contributions.
- Using individual contribution information as a factor in employee performance evaluations.

Responsibilities

Headquarters

Functional Responsibility

Corporate Personnel Management (CPM) at Headquarters has functional program responsibility for the CFC nationwide. CPM appoints the Headquarters executive committee, develops and issues Publication 530, produces articles for Postal Service publications, coordinates the postmaster general's publicity efforts, and coordinates the official CFC campaign kickoff.

National Chair and Vice Chair

The postmaster general/chief executive officer (PMG) chairs the national campaign. The PMG designates an executive to serve as the national vice chair, who initiates, promotes, and monitors the national CFC campaign.

Loaned Executives

The Loaned Executive Program is sponsored by the CFC to instruct mid-level managers from the postal, civil service, and military sectors on how to plan and execute the annual campaign. The Postal Service supports the Loaned Executive Program and, when possible, exchanges personnel with other federal agencies on a full- or part-time basis. A loaned manager may:

- Act as extension of the CFC staff and serve as liaison between OPM and the Postal Service.
- Motivate CFC drive leaders and give promotional speeches.
- Train team leaders and keyworkers.
- Coordinate and monitor CFC drive progress.

Field Offices

Vice Presidents, Area Operations, and Campaign Managers

Vice presidents, Area Operations, and campaign managers plan and administer CFC within their geographic boundaries. They establish drive Campaign managers must cultivate a working relationship with local leadership and communicate how they intend to integrate CFC messaging into day-to-day work in the form of standup talks, brainstorm other innovative messaging with leadership, and involve leadership in campaign planning. For specific questions regarding which activities or events are compliant with postal ethics rules, campaign managers shall contact an ethics official at Ethics.Help@usps.gov.

Area, Region, and District campaign managers plan and manage the CFC within their respective areas and districts.

In this role, they:

- Work with leadership to identify campaign committee members.
- Serve as liaisons with CFC representatives.
- Establish campaign objectives and steering committees ~~and designate district and installation team leaders.~~

Team Leaders

- ~~Team leaders administer~~ Present leadership a campaign brief, campaign calendar, and campaign plan early in the CFC season.
- Identify existing campaign coordinators or recruit new campaign coordinators for Area, Region, and District facilities, stations, and offices.
- Communicate with their facility, station, or office leadership weekly during the campaign, and ask them for help assigning the number of keyworkers (ideally, 1 per 15-25 employees) needed to run a successful campaign.
- Monitor and manage campaigns, and ~~monitor the drive~~ campaign progress and news on the CFC National USPS Campaign Workers site managed by the national postal CFC campaign manager.
- Provide guidance, materials, and support for campaign coordinators and keyworkers for facilities, stations, and offices ~~within their geographic jurisdictions throughout the operational chain of command. They also serve as liaisons with CFC representatives.~~ Region, Division, or District.

Keyworkers

Keyworkers are the backbone of a CFC campaign. Our success depends on their ability to interact well with coworkers. One keyworker is selected to coordinate contributions for approximately ten employees and to ensure that every Postal Service location is covered.

Planning a CFC Drive

Key Elements

- Steering Leverage communication and electronic meeting technologies.

During the season, campaign managers receive information, training, and resources from the national Postal CFC campaign manager, who provides support, postal-specific materials, weekly online check-ins, and reports for each year's campaign.

Leadership awareness of the CFC and providing sufficient complement for part or full-time CFC campaign work during the season are keys to the campaign's success. Charitable giving industry reports' data shows that campaigns with leadership support experience higher participation rates.

Campaign Committees

Steering Well-organized campaigns, particularly those with effective campaign committees, tend to have higher participation rates. Campaign committees are the driving force for organizing and implementing CFC campaigns. The From May to June, vice presidents, Area Operations, appoint members of campaign committees under their oversight, and district and facility steering managers appoint members of district campaign committees. The committees should include a chairperson, a team leader campaign coordinator, management representatives from each major operating unit, and employees with past CFC experience. Union and management organization leaders should be included whenever possible.

Loaned Executives

Complements

The Postal Service supports the Loaned Executives (LE) program. LE are federal, military, or postal employees loaned to the campaign. LE typically work their assignment from CFC zone offices and support campaigns in agencies other than their own. This is a temporary assignment or detail for a period that runs from **July-August training, through the end of January.** With manager permission and at CFC request, details may be extended through March to help the local zone with post-campaign tasks.

LE program candidates should start talking to their managers about the program in **May or early June.** A best practice for LE candidates is to let managers know well in advance that they are interested in this development opportunity. Annual solicitations for LEs, as a best practice, should go out in mid-June in order to allow time for applications, interviews, and selection in time to attend intensive training at their local CFC zone office.

LEs help other federal agencies with CFC goals, training, event planning, publicity, and tracking campaign results. This program lowers overhead costs for each agency, which increases the funds available for charities. The exchange of ideas and CFC knowledge between agencies fuels engagement.

provides LEs with invaluable development opportunities, and gives the LE an opportunity to give back to the community.

LEs work a regular 40-hour workweek schedule.

Area, Region, and District managers, when possible, should solicit for and select at least one LE per district to assist their local CFC zone. CFC pays for training. LE salary and out-of-pocket transportation expenses are paid out of their postal finance number. Per diem and travel expenses are not paid.

Candidates for the LE program are mid-level EAS employees living within 50 miles of their work unit who have at minimum:

- The ability to assume significant responsibility.
- Strong organization skills.
- Good public speaking skills.
- Experience organizing and holding events.
- The ability to work effectively with volunteers and leadership from many different departments.
- The ability to finish assignments with tight deadlines.
- A passion for the CFC or an interest in charitable fundraising.
- Good skills in communication and electronic meeting technologies.

National Chair

Typically, in May, CFC leadership invites the PMG to chair the postal national campaign. The PMG as national chair typically:

- Announces the national campaign and directs vice presidents to identify campaign managers and in turn, to direct district managers to identify campaign managers and submit their names to the director of National Human Resources.
- Acknowledges an executive to serve as the national vice chair.
- Supports the postal campaign through communications in holiday or other postal videos or memos, etc.
- Sends a memo summarizing national postal efforts after the end of the campaign.

National Vice Chair

The national vice chair, typically a vice president at HQ, normally monitors, promotes, and supports the campaign. In this role, from late May through the end of the campaign, he or she may be asked to:

- Establish HQ campaign goals and form a campaign committee in collaboration with the HQ campaign manager and national postal CFC campaign manager.
- Support the HQ CFC through communications regarding events and other publicity efforts, including speaking engagements, videos or memos, etc.
- Promote the national campaign by providing communication to vice presidents regarding the national campaign, establishing Area, Region, and District campaign goals, and monitoring the campaign.

Campaign Coordinators

During July and early August, campaign managers identify or recruit and select campaign coordinators (formerly called team leaders) to run the postal CFC at facilities, stations, and offices. Typically, campaign coordinators collaborate with their district campaign manager and district campaign committees. CFC zone offices typically conduct campaign coordinator training during the last two weeks in August.

Campaign coordinators must:

- Work with campaign leadership to recruit keyworkers locally.
- Serve as liaisons with CFC representatives
- Distribute materials and information to campaign workers and ensure paper pledge forms are available for campaign workers or employees who request them.
- Communicate with their campaign managers weekly during the campaign and ask them for help assigning the number of keyworkers (1 per 15-25 employees) needed to run a successful campaign.
- Collect pledge information (pledge forms and donor-shared receipts of online pledges) and monitor that paper pledge forms are correctly prepared before mailing pledges to the CCA for processing.
- Conduct weekly check-in meetings with all keyworkers in their geographic jurisdictions.
- Leverage communication and electronic meeting technologies as needed for CFC activities.
- For specific questions regarding which activities or events are compliant with postal ethics rules, campaign coordinators shall contact an ethics official at Ethics.Help@usps.gov.

Keyworkers

~~team leader determines~~ Keyworkers, as the word implies, are the keys to the success of the CFC. Keyworkers are employee volunteers for the CFC. They are individuals who talk to employees to raise awareness and invite them to make pledges during the campaign. The postal CFC campaign's success depends on the keyworkers' positive attitude, level of engagement, enthusiasm, and their ability to interact well with coworkers.

Campaign managers and coordinators: as a best practice, in July or early August, identify or recruit and select keyworkers based on the criteria below. Keyworkers receive training from the CFC zone office in the two weeks prior to the campaign. Select keyworkers before the end of the second week of August.

The CFC recommends a ratio of one keyworker for every 15-25 employees to ensure that every facility, station, and office is covered. This ratio ensures keyworkers have time to complete both their assigned regular job and talk to employees about CFC. As the employee face of the CFC, keyworkers should be individuals who are passionate about the CFC or supportive of fundraising. During the solicitation period for the CFC, each keyworker's goals are to:

- Contact every postal employee within their assigned installation or installations two or more times during the solicitation period and encourage them to consider making a pledge to the CFC. (Note that campaign workers may not solicit pledges from contract employees; they may answer contractors' questions and, if asked, provide them information about making a pledge.)
- Raise awareness of the campaign and the charities for which the campaign provides support by providing information about the CFC, the link to the online charities list or a paper copy of the catalog, and sharing information about causes supported by CFC charities.
- Promote online pledging as a secure, easy alternative to the paper pledge form and provide paper pledge forms upon request.
- Provide employees with correct information about the steps of making pledges and walk employees through registering online if asked to do so.
- Check paper pledge forms for completeness, readability and correctness; keep CFC donor forms securely stored and out of public view to protect PII; and give completed pledge forms to their campaign coordinator or campaign manager every week for mailing.

HR Onboarding Teams (Headquarters and Field)

As stated in the regulations governing the CFC (5 CFR 950), federal agencies shall provide information about the CFC to new employees at orientation. This means that:

- Postal new employee orientation sessions must include information regarding the CFC and instructions for making a pledge. Onboarding packets must include an information sheet provided by National Human Resources and given to each new employee during onboarding. Onboarding teams can obtain the most current printable PDF version of the sheet by emailing CFCUSPSHQ@usps.gov.
- New employees may pledge using any pledge methods, online or using the paper pledge form, within the solicitation period. New employees hired outside the solicitation period have 30 days to pledge if their hire date falls between the day after solicitation period closes and July 1; new

employees hired July 1 or later may pledge until the end of July. Employees hired after August 1, may pledge during the next CFC season.

Note: CFC donor portal closes for maintenance during the month of August.

Planning the local campaign

Best practices for a successful campaign

Campaign Managers

Start planning early – as early as May, when possible. To prepare for the upcoming CFC:

- Hold an initial planning meeting with the campaign committee. If there is no local campaign committee, consider forming one.
- Determine tentative dates for the local CFC kickoff and post-season awards ceremony.
- Establish a schedule and process for selecting campaign coordinators and keyworkers by talking with leadership first; then begin recruiting and selection.
- Contact the outreach coordinator for the local zone as early as possible to schedule training based on the number of locations, number of employees, and extent of instruction needed.
- Hold an event-scheduling meeting with the campaign committee; create an event calendar, and brainstorm event activities.
- Communicate with Ethics regarding activities planned for the season. For specific questions regarding which activities or events are compliant with postal ethics rules, please reach out to an ethics official at Ethics.Help@usps.gov.
- Coordinate publicity, stand-up talks, and other promotion for the campaign. Explore promotion channels such as local newsletters, “CFC Moment” slides for meeting decks, etc. Clear all publicity messaging through required local channels.
- Remember that CFC events and activities shall not promote or favor one particular charity over others.

As a best practice, campaign periods should match OPM’s determined and published solicitations period start and end dates. To comply with OPM regulations, all CFC solicitations must end by the date determined and published by OPM. Keep in mind that the solicitation period may vary depending upon the year; typically from about the second week in September through the middle of January. Should OPM extend the date of the solicitation period, all postal campaigns shall run until the officially extended end date. This optimizes the time for solicitations throughout the entire campaign.

Campaign Committees

IMPORTANT: During public health emergencies, protocols and precautions to ensure employee and customer safety may be required. Whenever similar Postal Service safety precautions are in effect, CFC operations shall follow all Postal Service policies for meetings, canvassing, and campaign events and activities. If circumstances require social distancing, activities such as CFC planning, team meetings, events, activities, and canvassing should comply with the following protocol: Webcasts for events, making remote electronic presentations, using public announcement systems to make CFC-related standup talks, making a phone call or email is recommended rather than in-person contact.

During July and August, campaign committees should meet regularly to plan solicitation season events. Consider members for the campaign committee based on their experience planning and running special events. Make the most of publicity and marketing and brainstorm creative and innovative ideas for activities. Recruit a technology-proficient individual to coordinate and facilitate events held remotely. Get an early start as a committee in order to design and clear events and activities through Ethics early, and get events and activity publicity out in advance.

Determine Local Complement

To ensure sufficient keyworker coverage (ideally, 1 keyworker per every 15-25 employees), a campaign manager or campaign coordinator's first task is determining the complement for each local drive-campaign. An accurate complement count is based on the total number of includes all career and noncareer employees at an installation who are currently in the master data base. The complement does not include casuals. Transitional employees may be canvassed for payroll deductions. database at each facility, station, and office in the geographic area the local campaign team is responsible for canvassing.

Campaign workers may canvass:

- All career and noncareer employees.
- Temporary employees may also be canvassed; however, if: Please note that payroll deduction pledges for temporary employees end with their duty break; if they are reemployed as part-time flexible employees, they must after the break, they have the opportunity to resubmit their payroll deduction pledge. If they return from duty break after the solicitation period closes, they have the opportunity to repledge for payroll deductions. The complement cannot be changed after the drive begins under the new hire rules within 30 days of reemployment between the end of the solicitation period and the end of July, or if reemployed after July 1, before August 1.

Publicity

Be sure to publicize your CFC drive. Campaign workers **must not** canvass contract employees. That said, contract employees **are allowed to voluntarily pledge**. If a contractor asks for help with information about the CFC or how to pledge, campaign workers may answer their CFC questions, provide the link to or a copy of the generic non-postal-specific pledge form, show them how to donate online or via paper form, and accept their paper pledges and checks.

Who can give through the CFC?				
Who can pledge using which method?	Online opm.gov/ShowSomeLoveCFC		Paper Pledge Form	
	Payroll Deduction or Annuity	Credit/Debit/ACH (one-time or recurring)	Payroll Deduction or Annuity	One-Time Check
Federal employees*	✓	✓	✓	✓
Federal retirees*	✓	✓	✓	✓
Federal contractors*	✗	✓	✗	✓

* can also pledge volunteer hours to CFC-participating charities that accept them.

Employee canvassing and CFC event attendance

Regulations specify that CFC events must be open to all employees. This applies whether the events are live visits with employees, online webcast presentations, intercom-broadcast standup talks, etc. OPM regulations regarding solicitation methods (5 CFR §950.502 (a)) state that:

Employee solicitations shall be conducted during duty hours using methods that permit true voluntary giving and shall reserve to the individual the option of disclosing any gift or keeping it confidential. Campaign kick-offs, victory events, awards, and other non-solicitation events to build support for the CFC are encouraged.

Please note that non-exempt employees and contractors may only participate off the clock or during authorized breaks.

Make the Local Campaign Visible

Publicize the campaign widely — and creatively. For example: A well-thought-out and frequent publicity campaign is always important.

■ Make use of CFC films, presentations, and other resources.

How to publicize your campaign:

- Cultivate leadership support for the season by contacting supervisors and managers well before the announced season starts.
- Distribute the PMG season announcement memo to all eligible employees, and coordinate preparation and distribution of local leadership endorsements. Send out weekly email bursts and place printed campaign updates in common areas.
- Provide leadership with frequent updates and material to present during stand-up talks and meetings with employees.
- Make use of CFC videos, websites, virtual charity fairs, presentations, and other resources. Use Zoom and other electronic communications methods to make the campaign visible. Where this is not possible, place printed campaign materials where employees can see the posters or banners, and where they can pick up informational flyers, cards, and Postal Service-specific pledge forms.
- Display localized CFC print materials (posters, campaign barometers, banners, etc.) in employee common areas and personal workspaces. Capture visiting postal customers who are also postal employees with displays in public areas; for example, a wall behind the clerks in a post office.
- Encourage ~~union and management~~ and union association participation in ~~your~~ local kickoff event and other local CFC events.
- ~~Distribute PMG endorsement memos to all eligible employees.~~
- ~~Coordinate preparation~~ Create and ~~distribution~~ distribute a printed and electronic calendar of local ~~endorsements~~ CFC events.
- ~~Acquire and distribute publicity videos and photos.~~
- ~~Establish contacts, create a resource file, and identify employees who have benefitted from CFC, and develop story angles.~~
- ~~ideas.~~ Write promotional articles ~~for local in-house media~~ using the information ~~you~~ gathered and submit for Area, Region, and District newsletters.

Scheduling

The campaign manager:

- ~~Determines dates for the local CFC kickoff, the start of the solicitation period, and the awards ceremony.~~
- ~~Establishes a time frame for selecting team leaders and keyworkers.~~
- ~~Schedules training based on the number of locations, number of employees, and extent of instruction needed.~~

~~To comply with OPM regulations, all drives must end on December 15.~~

Pledge Cards

- ~~The form issued by CFC each year is the **only** authorized pledge card used in Postal Service.~~ Submit photos, proper release forms, articles regarding CFC events, and stories about employees who have benefitted from CFC, to the LINK staff for nationwide LINK coverage. Release forms are available through local communications managers.

Schedule Ethics Review Of CFC drives. Pledge cards are completed by contributing Events

Always clear event activities through Ethics 3-4 weeks prior to any CFC event.

Never assume a campaign activity is ethics-compliant; all are required to clear activities through Ethics before the event occurs.

Invite Pledges, and Collect and Process Paper Forms

Campaign coordinators and keyworkers are essential to CFC success because they are the individuals who invite employees and processed by team leaders to pledge, explain the different ways to contribute, assist with events, collect, check, and process paper pledges. More specifically, campaign coordinators and keyworkers:

Contributions

~~Team leaders and keyworkers are responsible for:~~

- ~~Contacting~~ Contact employees as scheduled. Provide information about CFC causes, invite them to pledge to the campaign, and provide instructions on how and where to pledge.
- ~~Honoring the~~ Explain how the payroll deduction pledge makes contributing a bigger pledge easier to afford by spreading the total over 26 pay periods.

Describe the advantages of online/mobile versus paper for payroll deduction pledges:

- Online payroll deduction donations made during the solicitation period will become effective immediately after the campaign end date. Employees who submit a paper payroll deduction form later in the campaign may see a delay before their deductions become effective. Encourage early payroll deduction pledges.
- Emphasize online pledging:
 - Pledges are secure and easy to make.

- Payroll deduction pledges made online will not experience processing delays.
- Pledge record is accessible any time 24/7/365; receipt for tax purposes provided on request.
- Pledges made online this year can be loaded into next year's cart for easy repeat donation.
- One-time online or mobile pledges are processed immediately.
- Point out the drawbacks of paper pledges:
 - Must be mailed and take time to process.
 - Require filling out a new form every season.
 - Require making and keeping a paper copy as a record.
 - Have a higher chance of errors through manual completion and processing.
- Verify the accuracy of paper pledge forms by checking legibility, spelling, unit code, and CFC Zone number. **For payroll deduction pledges only**, check that total and payroll period amounts tally correctly, and the correct employee ID number (EIN) is entered. Contact local HR if employee does not know or campaign worker cannot look up employee's EIN.
- Account for and securely store paper pledge forms before mailing (or handing off to team member assigned to prepare a pledge report form and mail) the processed forms to the CCA every week.
- Honor the privacy and confidentiality of all participants and the amounts they have pledged.
- ~~Stressing the payroll deduction plan and the advantage of making small payments spread over the entire year.~~
- ~~Verifying the accuracy of pledge cards.~~
- ~~Accounting for all funds, and transmitting them weekly.~~
- Reviewing weekly status reports with the campaign manager or campaign coordinator, identify poor response locations, determine causes, and take corrective action needing additional attention, and schedule revisits.

Group Solicitation Events

IMPORTANT: During public health emergencies, protocols and precautions to ensure employee and customer safety may be required. Whenever similar Postal Service safety precautions are in effect, CFC operations shall follow all Postal Service policies for meetings, canvassing, and campaign events and activities. If circumstances require social distancing, activities such as CFC planning, team meetings, events, activities, and canvassing should comply with the following protocol: Webcasts for events, making remote electronic presentations, using public announcement systems to make CFC-related standup talks, making a phone call or email is recommended rather than in-person contact.

Group ~~Requesting contributions from employees in groups is usually more productive and efficient than contacting employees one by one. After a rousing rally or presentation and the CFC film, the communal~~

mood is often elevated and generosity is at its peak. Provide ample pledge cards and encourage everyone to sign up before the session ends. CFC team leaders and keyworkers should be the first to sign up.

events can ramp up enthusiasm for the CFC and promote increased participation. Some ideas for activities that can be held during group events, whether they are held at the same physical location or over the intranet, include:

- Invite charities to speak or provide video. Contact local zone outreach coordinator to obtain charities.
- Describing how payroll deduction donations provide the opportunity to have a large impact for a low biweekly amount.
- Providing how-to pledge demonstrations and showing the ease and convenience of online or mobile giving.
- Demonstrating the mobile app for Samsung or Apple phones. The app, *CFC Giving*, is available for donors wishing to pledge using their phone.
- For those unable to pledge online or by mobile, supply paper pledge forms. Those who do have online access should be urged to donate online. Provide a PDF pledge form if requested.
- Wrap up every event with an invitation to pledge. Invite everyone at the event to consider pledging whatever amount they are comfortable giving. CFC campaign coordinators and keyworkers can describe how easy it was for them to pledge. Offer help to those who request it, at or after the event.
- Follow up individually after events with an email, phone call, meeting or IM, or How to Pledge card emailed or placed in their work area.

Individual Solicitation

If group solicitation is not feasible, plan and to follow up after events:

- Plan the best time and place to contact each employee.
- Solicit contributions at all levels and on all tours.
- Personal stories about why the CFC is important are very effective.
- Ask the individual what causes they are passionate about.
- Keyworkers should keep have paper pledge cards and ask forms available for employees to completed who request them in their presence. Don't leave.
- Follow up when leaving paper pledge cards/forms with employees to complete later; don't leave them or when leaving a form in the workplace for an absent employee who is absent.

Reporting

Weekly Status Reports

Submitting

Team leaders Keeping, processing, and sending paper pledge forms

Campaign coordinators and keyworkers verify and transmit pledge cards every process paper pledges each week, as follows:

- Send payroll deductions to during the HRSSC for data entry. Include the team leader's name, address, and phone number with the first week's transmittal.
- Send copies of campaign. Every campaign worker who handles paper pledge cards and one-time payments to the local Principal Combined Fund Organization (PCFO).

The last weekly submittal of payroll deduction cards/forms must reach the HRSSC by December 15.

Payroll deduction data is input at the HRSSC effective the first pay period of the coming calendar year, and payroll copies of pledge cards are returned to team leaders.

Correcting

Incomplete and illegible pledge cards are processed as follows:

- HRSSC returns the cards to team leaders for processing in the first pay period or later.
- HRSSC notifies Distributed Data Entry and Distributed Reporting (DDE/DR) sites by electronic mail of the date they may access employee master files D20M and SD1-09 for data input. (Local sites have no access to these files for CFC entries before that time.)
- DDE/DR sites retain corrected cards and payroll copies for 6 months, then destroy them.

Final Reports

After December 15, team leaders submit final summary reports through channels to the Manager, Corporate Personnel Management.

- Check each form for legibility and accuracy. Forms with illegible information or errors will delay the funds reaching charities. Please take care to ensure that:
 - The employee's name is readable. If not, contact the employee and confirm.
 - The unit code is correct. To verify the employee's unit code (CFC ID number for each employee's work location), ask the CFC zone representative, or look it up on the donor portal (log in on the donor portal to look up the unit codes).
- If the pledge is a payroll deduction:
 - Does the total amount divide correctly by the number of pay periods? If not, contact the employee and correct.
 - Is the employee's EIN legible and correct? Verifying this may require checking with local HR, who can look up their EIN and confirm.
 - Has the employee provided contact information in the form of a work or personal email address? If employee has no email address, ask them to provide a phone number. The

CCA uses contact information **only** to contact the employee regarding an issue processing their pledge.

- Keep (or make) two copies of the verified pledge form: one for the employee for their records and one for local campaign records.
- Treat all pledge forms as secure and confidential documents. Securely store all original forms and checks, and all copies of forms, out of public view, and in a locked cabinet or drawer.
- Copies of pledge forms kept for CFC team records must be discarded by cross-cut shredding once all pledges are processed by the CCA, or no later than seven months after the end date of that season's solicitation.
- Process and transfer forms weekly:
 - **Keyworkers:** Give completed, verified pledge forms and copies to coordinator or campaign manager once a week.
 - **Campaign managers or coordinators:** Prepare a summary page for pledges. Check each form. Place forms with attached checks in an envelope marked with local CFC zone number, and mail to the CCA. GS-10 postage may only be used if agency policy allows it: Check with the campaign manager or email CFCUSPSHQ@usps.gov with questions.
- The final weekly paper pledge form mailing should take place by the solicitation period deadline announced by OPM. If the original deadline is extended, accept pledges until that official extended deadline.
- The CCA provides help to campaign workers and donors through its donor portal help line at 800-797-0098 or cfcgiving.opm.gov/contact. Select the appropriate number for donor or campaign worker status.

Rescinding Payroll Deduction Donation

CFC payroll deductions may be cancelled at any time, but this is the only change permitted outside the solicitation period. Employees wishing to cancel their deductions should contact their agency payroll office and request the allotment be cancelled.

Closing Out the Campaign

Critiquing Results

The ~~team leader~~campaign coordinator conducts a post-~~drive~~campaign assessment to compare results with objectives, analyze strengths and weaknesses, and recommend improvements. Campaign coordinators share these assessments with their campaign managers.

Recognizing Participants

~~Team leaders~~Campaign coordinators write thank-you letters to keyworkers, other CFC ~~drive~~-assistants, and participating employees. Managers and postmasters conduct appropriate local award ceremonies to honor campaign managers, ~~team leaders~~campaign coordinators, keyworkers, and contributors. Postal Service in-house publications announce recognition by the CFC.

CFC Drive Plan

August

Vice Presidents, Area Operations, and Campaign Managers

- Establish objectives.
- Designate district and installation team leaders.
- Prepare and distribute management letter to team leaders and keyworkers.
- Select steering committees.

Campaign Managers or Team Leaders

- Determine complement at all locations.
 - Develop drive timetable.
 - Coordinate participation of the CFC representative.
 - Order training and publicity materials, pledge cards, and agency catalogs from CFC.
 - Select keyworkers.
 - Schedule training.
-

Early September

Campaign Managers or Team Leaders

- Plan kickoff rally.
 - Complete training and distribute materials.
 - Promote drive:
 - Publish PMG endorsement.
 - Prepare and distribute management letter to employees.
 - Display lobby posters.
-

Mid-September to Mid-November

Campaign Managers or Team Leaders

- Conduct kickoff; show CFC video.

Team Leaders, Keyworkers

- Solicit employee contributions:
 - Distribute catalogs and pledge cards.
 - Contact all employees.
 - Encourage payroll deductions.
-

- Submit weekly reports:
 - Verify pledge cards.
 - Send cards to HRSSC and PCFO.

December 15

Team Leaders, Keyworkers

- End solicitations.

December 15 to First Week in January

**Campaign Managers,
Team Leaders,
Keyworkers**

- Submit final reports:
 - Summarize drive results.
 - Assess strengths and weaknesses.
 - Recommend improvements.
 - Transmit through channels to HQ CPM.
 - Recognize drive workers:
 - Write thank-you letters.
 - Conduct awards ceremony.
-

Training Keyworkers

Resources

Postal Service

Publication 530, Combined Federal Campaign Operational Guidelines, is available at <http://blue.usps.gov/cpim/ftp/pubs/pub530.pdf>. Trainers can use Tips for Keyworkers, on page 19, to set the tone for training and to summarize important points.

Combined Federal Campaign

CFC provides excellent publicity and training materials with explicit instructions for team leaders and keyworkers, including:

- Campaign video illustrating current theme.
- Promotional posters, lobby displays, and awards.
- Blank pledge cards.
- Member agency catalog.
- Fact sheets.
- Team leader kits.
- Keyworker kits.

Responsibilities

Team Leaders

- Attend steering committee meetings and lead kickoff ceremonies.
- Request endorsements from union and management leaders.
- Select keyworkers.
- Provide on-the-clock time for training and employee solicitation.
- Support keyworkers and involve them in meetings.
- Monitor drive progress against Postal Service objectives.

Keyworkers

- Distribute materials.
- Solicit contributions.
- Collect lump-sum payments.

- ~~Verify pledge cards.~~
- ~~Prepare weekly reports.~~

Pledge Cards

Seeing that pledge cards are completed correctly is an important part of a keyworker's job.

Keyworkers

- ~~Print employee name, agency (USPS), and CFC reporting number. Print firmly with ball point pen to imprint on attached copies.~~
- ~~Explain completion to employees if necessary.~~

Employees

- ~~**Employee ID.** Complete second line of ID data. Enter USPS department finance number in box labeled PAYROLL OFFICE LOCATION.~~
- ~~**Payroll Deduction.** Under CIVILIANS column:~~
 - ~~— Fill in the \$ blank or select one of the preprinted dollar amounts to show payroll allotment to be deducted each pay period (PP). Minimum deduction is \$1 per PP; maximum is \$999.99 per PP.~~
 - ~~— Calculate annual contribution and enter in TOTAL GIFT column.~~
 - ~~— Formula: 1 PP deduction x 26 PPs (or 27) = annual deduction.~~
 - ~~— Sign and date card in the PAYROLL DEDUCTION or AUTHORIZATION section.~~
- ~~**One-Time Lump Sum.** Under the CIVILIANS column:~~
 - ~~— Select Cash or Check and enter contribution in TOTAL GIFT column.~~
 - ~~*Note:* Keyworkers will discourage cash payments.~~
 - ~~— Write check or money order for the total amount, payable to CFC, and give it to the keyworker. Do not sign the payroll deduction authorization section. Signature and Social Security Number are not required for lump-sum payments.~~
- ~~**Agency Designation.** Under DESIGNATED GIFTS section:~~
 - ~~— Enter in boxes from left to right the 4-digit agency code number listed in the catalog and the amount to be contributed by either payroll deduction or lump sum.~~
 - ~~— Enter same as above in additional boxes if dividing the contribution among two or more agencies.~~
- ~~**Information Release.** In the NAME RELEASE AUTHORIZATION section, stipulate whether or not your name and address may be released to the agency designated:~~
 - ~~— I DO. Check this box to authorize release and enter name and address. The information will be forwarded to designated agencies and you may be resolicited by those agencies in the future.~~
 - ~~— I DO NOT. Check this box to deny release and leave rest of section blank. The information will not be forwarded to the designated agency.~~
 - ~~*Note:* If neither box is checked, name and address will be forwarded.~~

Keyworkers

Give Contributor's Receipt copy of pledge card to the employee.

Weekly Status Reports

Team leaders and keyworkers process pledge cards on CFC reporting envelopes and submit weekly after verification and consolidation.

Verification

Keyworkers

- — Ensure that all payroll deduction pledge cards are completed accurately and signed.
- — Check CFC reporting number and USPS finance number.
- — Verify math calculations: all amounts to designated agencies equal amount of total gift; lump-sum contributions equal dollar amount of cash/check/money orders collected.
- — All payroll deduction pledges must be signed. Note the information release section; if neither box is checked, names and addresses will be forwarded to designated agencies.

Team Leaders

Verify all card data submitted by keyworkers.

Consolidation

Keyworkers

- — Follow CFC step-by-step instructions.
- — Separate payroll deduction pledges from lump-sum pledges (and collected checks/money orders).
- — Complete transmittal slip and keyworker envelope totaling weekly pledge cards.
- — Submit all pledges and funds in unsealed envelopes to the team leader.

Team Leaders

- — Follow CFC instructions.
- — Remove payroll deduction pledge cards from keyworker envelopes and send to the HRSSC.
- — Consolidate keyworker envelopes in team leader's envelope and complete information totaling weekly contributions.
- — Enclose CFC copies and funds, seal envelopes, and forward to the local PCFO.

Final Reports

At the close of the campaign, keyworkers and team leaders summarize CFC drive results in final statistical reports through channels to the Manager, Corporate Personnel Management.

Computations

For each installation, keyworkers analyze drive contributions to compute the following:

- — Total number of contributing participants.
- — Total dollar amount of contributions.

- ~~Participation percentage of total employee complement.~~
- ~~Number of employees making payroll deduction contributions.~~
- ~~Number of employees making one-time contributions.~~
- ~~Average contribution amount.~~

Formulas

~~To compute participation percentage, keyworkers average contribution and per capita amount using these equations:~~

- ~~**Participation Percentage** = Total Complement divided by Total Number Contributing.~~
- ~~**Average Amount** = Total Dollar Amount divided by Total Number Contributing.~~
- ~~**Per Capita Amount** = Total Contributions divided by Total Complement.~~

Time Frame

~~Keyworkers will complete the final report by the end of the first week in January. Team leaders will sign the report, provide a copy to the local CFC chairperson, and forward the report through channels to the Manager, Corporate Personnel Management.~~

Priorities

~~Team leaders and keyworkers should keep these key ideas in mind:~~Final Campaign Reports

OPM sends weekly reports to the HQ national postal campaign manager throughout the campaign, after the solicitation period closes and until the official cutoff date (the date at which disbursements to charities must begin). The national campaign manager analyzes these reports and posts them as a dashboard on the USPS National CFC Campaign Worker site. The site and reports are available to all campaign workers year-round.

Campaign workers who want access to the USPS National CFC Campaign Worker site can request access when prompted on their first visit to the site.

The final report for the campaign publishes as a LINK article at some point after the official cutoff date.

- ~~Group solicitation preference.~~
- ~~Payroll deduction plan preference.~~
- ~~Team leaders and keyworkers sign up first.~~
- ~~Payroll deduction cards are signed and dated.~~
- ~~Checks are made out to CFC.~~
- ~~Custody of pledge cards by keyworkers only.~~
- ~~Accountability for all pledge cards and lump-sum payments.~~
- ~~Weekly verification of funds.~~
- ~~Weekly submission of CFC report envelopes.~~

Sample Training Session Plan

Before Training

Before training begins, the campaign manager will:

- — Order and review instructional materials.
- — Prepare training session or arrange for another trainer to prepare.

During Training

While training is being conducted, the trainer will:

- — Make sure that team leaders and keyworkers understand their responsibilities.
 - Give instructions for completing pledge cards, weekly status reports, and final reports.
 - Stress priorities.
 - Review Tips for Keyworkers, on page 19.
 - End training as follows:
 - — Conduct a question and answer session.
 - — Show the CFC video.

Tips for Keyworkers

First of All...We Thank You!

And this comes from the heart — of the CFC, of your postmaster, and especially of the millions of people who benefit directly from the services of voluntary nonprofit agencies.

As a keyworker and caring person, we have every confidence in your ability and promise our support. We know you will do your utmost to reach our goal in this humanitarian program; we can't do it without you.

Getting Started

Be Knowledgeable — Become familiar with the information in your keyworker's kit and these Guidelines. Know what the CFC is all about and what it does.

Be Confident — Soliciting is easy when you have a good product, and you can't beat the CFC for quality. All you need is your good common sense, personal enthusiasm, campaign commitment...and a pinch of persistence. Wear your **Keyworker** pin with pride.

Be Off! — Get off to an early start, as soon as possible after the kickoff and CFC video.

Gaining Momentum

Go Go Go — Set the pace: Make your own payroll deduction pledge before soliciting coworkers, and then:

- — Appeal to charitable instincts and rewards of giving.
- — Explain value of payroll deductions.
- — Request check/money order for lump-sum payments; discourage cash contributions.
- — Stress the variety of people helped by CFC.
- — Maintain positive attitude — it feels good to do good.

Group Solicitation

Mass psychology often works in favor of promoting a good cause, so people are more spontaneous and giving when asked for donations in a group. Take advantage of the emotional high from the CFC film, energetic speakers, and promotional material. Peer pressure is another benefit.

- — Express your own cheerful enthusiasm and sincerity.
- — Make it easy for everyone to contribute.
- — Pass out pledge cards and agency catalogs as people enter.
- — Place cards and catalogs strategically where everyone must pass.
- — Offer assistance in completing cards and answer questions.
- — Try to get the whole group to sign up on the spot.

Individual Solicitation

When it isn't practical to meet in groups, contact every employee at least once. See those first who are most receptive.

- — Pick the most convenient meeting time for each person.
- — Hand the person an agency catalog and pledge card.
- — Explain how to use the catalog and complete the card.
- — Offer to show the CFC video.
- — Give real examples of how CFC agencies have helped people.
- — Have the card completed while you wait.
- — Collect checks for single payments.
- — Leave the catalog, but not the card, if there is resistance.
- — Schedule a second meeting to revisit nonparticipants.

Following Up

Reinforcement

Thank all participants for their pledges, whether by payroll deduction or lump sum, on behalf of the CFC and your postmaster. However:

- — Urge lump-sum givers to reconsider payroll deduction.
- — Respect confidentiality of coworkers.

Reminders

A few precautions:

- — Don't discuss with anyone who gave what — no dollar amounts, justifications, or personal comments.
- — Don't pressure anyone who refuses to participate after your best efforts to persuade.
- — Don't get discouraged; Postal Service employees have a history of enormous support for the CFC program.

Winding Down

Double Check

Keep accurate records with all paperwork current and organized. Make sure all pledge cards are properly completed and all dollar amounts tally with totals on cards.

R & R

Report and Relax. Well done!

~~And Last of All...Thanks Again!~~

~~You are the energy source of the campaign — a mover and shaker who believes in the worth of CFC and spreads your goodwill to coworkers. And the joy of giving is contagious. We commend your selfless dedication, upbeat attitude, and ongoing support; you exemplify the best of the Postal Service.~~