



Gateway Combined Federal Campaign Position Descriptions

The Campaign Volunteer Support Summary Chart
is a separate document.

<u>Page #</u>	<u>Contents:</u>
2	Leadership Chair Position Summary
3	Leadership Vice-Chair Position Summary
4	Labor Leadership Chair and Vice Chair Position Summaries
5	Division Chair and Vice Chair Position Summaries
6	Joint Work Group
7	Campaign Representative Position Summary
8	Campaign Coordinator Position Description
9	Torchlighter Duties
9	Auditor/Data Entry Volunteers
10	Graphic Design, Printing, Other Opportunities
11	Principal Combined Fund Organization (PCFO) Staff

Leadership Chair Position Summary

The Combined Federal Campaign Chair works on behalf of the Local Federal Coordinating Committee (LFCC) to achieve the Combined Federal Campaign goals. The duties of the campaign chair include:

Recruitment

- Assist the LFCC in recruiting a senior volunteer to serve as the Vice-Chair of the overall CFC Leadership Committee
- Assist the LFCC in recruiting a senior volunteer to Chair each of the four Gateway CFC Divisions (Eagle, Garrison, Patriot and Vanguard)
- Assist with recruiting of 16 Joint Work Group members to serve on the Training, Award, Events, Labor, and Communications committees.
- The Chair usually lines up an Executive Assistant who helps with much of these tasks. The Leadership Chair's Executive Assistant has historically served as the Joint Work Group Chair (described near the end of this document).
- Assist with recruiting of Campaign Representatives, Torchlighters, Auditors and Data Entry volunteers (*descriptions for each volunteer position are included in this document*).

Goal Setting

- After reviewing internal and external factors that might affect participation in the CFC, the Leadership Committee will submit a recommended goal to the LFCC for approval.
- Encourage and negotiate aggressive goals with the CFC accounts that will support the overall dollar goal of the annual campaign.

Cultivation

- Meet with the Vice-Chair and Division Chairs to brief them on their campaign responsibilities
- With the assistance of the Division Chairs, meet with the Ranking Persons of the "Top Forty" federal agencies (CFC accounts) within the CFC to increase their commitment to the CFC through their personal support, by conducting strong campaigns that provide all personnel the opportunity to participate in the CFC and by providing motivated and caring personnel to conduct their organizational campaigns. Historically, this has been significantly accomplished through a Breakfast event in advance of the campaign kickoff, with additional contacts on an as needed basis.
- Leadership Giving will be presented as a key component of the overall success of the general campaign and ranking persons will be encouraged to ensure that every potential contributor at the organizational level is aware of the Leadership Giving Program and has an opportunity to participate.

Review Progress

- The CFC Chair monitors campaign progress and intervenes to engage leadership support in those accounts where the campaign effort is less than what is needed to ensure that every federal employee is given an opportunity to participate in the CFC.

Meetings

- Run meetings of the Leadership Committee and the PCFO, approximately monthly April through January, to plan and execute the campaign.
- Host the main CFC Kickoff Events (currently two, downtown St. Louis and Scott AFB) for CFC volunteers and contributors:
- Co-Host the Labor/Management Top Account Cultivation Event (currently a breakfast).

Leadership Vice-Chair Position Summary

The Leadership Vice-Chair works with the Campaign Chair and on behalf of the Local Federal Coordinating Committee to achieve the Combined Federal Campaign goal. The role of the Leadership Vice-Chair is important as the Vice-Chair will need to fill in for the Chair in cases when the Chair is not available. Also the Vice-Chair is slated to serve as Chair in the next campaign and will be expected to provide a measure of continuity and experience for the subsequent campaign. Therefore the expectation is that the Vice-Chair will be fully engaged in the campaign. The description of duties for the Vice-Chair is therefore very similar to that of the Campaign Chair:

Recruitment

- Assist the LFCC and Chair in recruiting a senior volunteer to Chair each of the four Gateway CFC Divisions -- (Eagle, Garrison, Patriot and Vanguard).
- Assist the Chair in recruiting Joint Work Group members, Campaign Representatives, Torchlighters, Auditors, and data entry personnel (*Job descriptions for each volunteer position are included in this manual*).

Goal Setting

After reviewing internal and external factors that might affect participation in the CFC, the Leadership Committee will submit a recommended goal to the Local Federal Coordinating Committee for approval. Encourage and negotiate aggressive goals with the CFC accounts that will support the overall dollar goal of the annual campaign.

Cultivation

- Meet with Division Chairs to brief them on their campaign responsibilities
- With the assistance of the Division Chairs, meet with the Ranking Persons of the “Top Forty” organizations within the CFC to increase their commitment to the CFC through their personal support, by conducting strong campaigns that provide all personnel the opportunity to participate in the CFC and by providing motivated and caring personnel to conduct their organizational campaigns.
- Leadership Giving will be presented as a key component of the overall success of the general campaign and ranking persons will be encouraged to ensure that every potential contributor at the organizational level is aware of the Leadership Giving Program and has an opportunity to participate.

Review Progress

- The CFC Vice Chair monitors campaign progress and intervenes to engage leadership support in those accounts where the campaign effort is less than what is needed to ensure that every federal employee is given an opportunity to participate in the CFC.

Meetings

- Attend meetings of the Leadership Committee and the PCFO, approximately monthly April through January, to plan and execute the campaign.
- Attend the main CFC Kickoff Events (currently two, downtown St. Louis and Scott AFB) for CFC volunteers and contributors:
- Attend the Labor/Management “Top” Account Cultivation Event (currently a breakfast)

Labor Leadership Chair Position Summary

The Combined Federal Campaign Labor Leadership Chair works in Partnership with the Campaign Leadership Chair, on behalf of the Local Federal Coordinating Committee, to achieve the Combined Federal Campaign goals. The duties of the Labor Leadership Chair include the following:

Recruitment

- Recruit Labor representatives to partner with each of the CFC Division Chairs (Eagle, Garrison, Patriot and Vanguard)
- Recruit Labor representatives to serve on the Joint Work Group.

Goal Setting

After reviewing internal and external factors that might affect participation in the CFC, the Leadership Committee will submit a recommended goal to the Local Federal Coordinating Committee for approval. Encourage and negotiate aggressive goals with the CFC accounts that will support the overall dollar goal of the annual campaign.

Cultivation

- Meet with the Labor Representatives and brief them on their campaign responsibilities
- With the assistance of the Division Labor representatives, meet with the leadership of all labor organizations representing federal employees within the CFC to obtain their endorsement of the CFC by letter and through their personal support.

Review Progress

Follow-up with Division Labor Representatives regularly, ideally weekly, throughout the campaign season to document best practices used to promote and support the CFC.

Meetings

- Attend meetings of the Leadership Committee and the PCFO, approximately monthly April through January, to plan and execute the campaign.
- Attend, and possibly speak at, the main CFC Kickoff Events (currently two, downtown St. Louis and Scott AFB) for CFC volunteers and contributors:
- Co-Host the Labor/Management Top Account Cultivation Event (currently a breakfast)

Division Labor Chair Position Summary

Each Division has a Labor Chair who will assist the Labor Leadership Chair in the activities listed above, respective to their Division.

Division Chair Position Summary

Each of the four Combined Federal Campaign Division Chairs works in conjunction with the Campaign Chair and the Campaign Leadership Committee to achieve Gateway Combined Federal Campaign goals. The Division Chair will assist the Campaign Chair in the following activities within their respective Divisions.

Recruitment

- Assist the LFCC in recruiting a Vice-Chair and Labor Representative
- Recruit Joint Work Group members, 4 to 6 Campaign Representatives, Torchlighters, Auditors and Data Entry volunteers. Job descriptions for each volunteer position are included in this document.
- Division Chairs frequently line up an Executive Assistant to help with much of these tasks.

Goal Setting

After reviewing internal and external factors within their Division that might affect participation in the CFC, work with the Leadership Committee to submit a recommended total campaign goal to the Local Federal Coordinating Committee for approval. Encourage and negotiate aggressive goals with the CFC accounts that will support the overall dollar goal of the annual campaign.

Cultivation

- Meet with the Ranking Persons of organizations ranking in the “Top” accounts within the CFC to solicit their commitment to the CFC through their personal support, by conducting strong campaigns that provide all personnel the opportunity to participate in the CFC and by providing motivated and caring personnel to conduct their organizational campaigns.
- Leadership Giving will be presented as a key component of the overall success of the general campaign and ranking persons will be encouraged to ensure that every potential contributor at the organizational level is aware of the Leadership Giving Program and has an opportunity to participate.

Review Progress

- The Division Chair monitors campaign progress and intervenes to engage leadership support in those accounts (federal agencies in their CFC Division) where the campaign effort is less than what is needed to ensure that every federal employee is given an opportunity to participate in the CFC.

Meetings

- Attend meetings of the Leadership Committee and the PCFO, approximately monthly April through January, to plan and execute the campaign.
- Attend the main CFC Kickoff Events (currently two, downtown St. Louis and Scott AFB) for CFC volunteers and contributors:
- Attend the Labor/Management Top Account Cultivation Event (currently a breakfast)

Division Vice Chair Position Summary

Each Division has a Vice Chair who will assist the Division Chair in the activities listed above. The Vice Chair becomes the Chair in the subsequent campaign cycle.

Joint Work Group

The Joint Work Group consists of five working committees comprised of at least three persons each and a Joint Work Group chair.

- **Joint Work Group Chair** – Supervises the working committees and serves as the liaison between the CFC Leadership Chair and the following committees. In addition, the JWG chair works closely with the Campaign Leadership Chair and PCFO Campaign Director to coordinate the Chair’s participation in campaign events. The JWG Chair has historically been the Leadership Chair’s Executive Assistant.
- **Training Committee** -- Under the direction of the PCFO, develops training materials and conducts training for Campaign Representatives, Torchlighters, Coordinators and Keyworkers.
- **Labor Committee** – Ensures that labor has a role in the development and implementation of the CFC. The chair of this committee is the Labor Chair for the General Campaign (Leadership Committee).
- **Events Committee** – Works with the PCFO to organize campaign events. Works within a budget provided by the PCFO director, as approved by the LFCC. Subcommittees currently are:
 - **Kick Off**
 - **Victory Celebration**
- **Awards Committee** – Reviews criteria for organizational and individual awards as needed. Selects awards. Identifies organizational award winners based on statistical criteria. Identifies individual award winners based on review of nominations, which includes both subjective information and objective statistics.
- **Communications Committee** – Responsible for the dissemination of information about the campaign to community. This committee has informally been filled by the Federal Executive Board Public Affairs Committee in the past.

Campaign Representative Position Summary

Campaign Representatives (CRs) are provided to the Gateway Combined Federal Campaign for approximately 16 weeks to assist the Ranking Persons and Coordinators of assigned accounts in planning and implementing effective workplace campaigns. CRs can have a full-time commitment to the CFC for the season, or their accounts can be assigned to the degree of time that they can commit to the CFC. A full time CR is assigned more accounts than a part-time CR. The ideal amount of CR energy contributed to the campaign is a minimum of three or four full time equivalent (FTE) CRs for each of the four Gateway CFC Divisions, or 16 FTEs. Total time committed by a full time CRs equals about 650 hours; a Part-time CR can assist in a minimum of 100 hours. **Many CRs serve in range of 400 to 100 hours total in the course of the CFC season. All CRs should plan to attend two full days of training, typically scheduled in mid-August.**

The Campaign Representative job description is:

- Attends a two-day training in St. Louis, in advance of the campaign season
- Analyzes agency campaign history, current resources and potential
- Develops preliminary strategy for each agency account (federal agency)
- Contacts each account to coordinate campaign scheduling
- Meets with each Ranking Person, along with the Coordinator and the Union Representative for each account to discuss the Campaign Victory Plan
- Obtains the Ranking Person's commitment to a goal and with the agency's Coordinator, plans a detailed campaign strategy for each account
- Develops a detailed campaign strategy with Coordinators. Analyzes internal and external resources and schedules implementation of the selected plan of action
- Assists the Coordinator in establishing an agency campaign team and works with the PCFO to conduct Keyworker training
- Accepts responsibility for picking up Coordinator/Keyworker report envelopes, and securely delivering them to the campaign office
- Orders and delivers campaign supplies and donor appreciation gifts
- Attends all account rallies and general campaign events and weekly CR team meetings
- Monitors account activity and reports progress to the PCFO at weekly team meetings, and to Division Chairs on request
- Attends campaign events such as the Labor/Management event (historically a breakfast several weeks prior to the kickoff), the big kickoff(s), the CR campaign accounts' rallies, and the big celebration

Campaign Coordinator Position Description

The Coordinator is appointed by the Ranking Person to assume the complete responsibility for conducting an annual CFC campaign within their organization. There is typically one Coordinator for each federal agency, or CFC account (federal agencies as they are organized for purposes of the CFC). With the assistance of the Campaign Representative (CR), the Coordinator plans and implements a campaign plan tailored to their organization and its workplace(s), thereby enhancing the chances for a successful campaign.

Every federal agency, large or small, has at least one internal Campaign Coordinator.

Responsibilities

- Organize the Campaign Team early - before the overall campaign kickoff. Recruit Keyworkers; one person for every 15-25 people; each work site and shift should be represented; Keyworkers are "Key Persons" and require good human relations skills.
- Become familiar with CFC training manual and literature. Fully understand the role of Keyworkers, and know that at smaller offices the Coordinator fulfills the role of Keyworker
- Analyze organization's giving history and help to determine current year's goal based on regional averages, numbers of employees and other organizational conditions
- Identify organization's campaign strengths and weaknesses by reviewing last year's campaign; review with the Ranking Person if possible
- Attend the goal setting meeting with the Ranking Person, Labor Leader and the CR
- Publicize the campaign; maintain effective communications throughout the organization
- Conduct rallies that are accessible to all shifts; use CR, Torchlighter, Union representative and Agency speakers
- Conduct an enthusiastic, informative campaign... Involve as many people as possible...Have Fun!
- Make sure that all Keyworkers collect completed pledge cards and fill out a Keyworker Envelope. Review the Keyworker envelope contents with the Keyworker, and sign off certifying they are complete as reported
- Deliver Payroll copy of pledge cards which have payroll deductions to the payroll office
- Ensure that Keyworker Envelopes are kept in a secure location, and connect with CR for frequent pickups (ideally weekly)
- Ensure that Donor appreciation gifts are distributed promptly
- Communicate frequently with CR about campaign status

A list of Keyworker responsibilities is available upon request, and is provided in the Campaign Coordinator/Keyworker Manual.

Torchlighter Duties

Torchlighters are individuals who have benefited from and/or volunteered for CFC-funded non-profits in their personal life, and are willing to share their story. A highly effective way to engage people in thinking about the programs that they can assist is by hearing about programs from a witness or direct beneficiary. When someone hears a co-worker -- someone just like them -- speak about the help they have received, or ways they have volunteered to help others, it can be very moving. That said, while Torchlighters are encouraged to speak about their personal experiences, they also must talk about the CFC overall, and include the fact that more than 2,000 charities are listed in the options to which federal employees may give. Training and coaching in speech-making will be provided. Torchlighters will need to be released from their workday occasionally and possibly on short notice during campaign season, to speak in person to fellow federal employees at CFC rallies. This part-time position require a minimum of 10 hours, and up to 40 hours of presentation and travel time at sporadic times during the course of the campaign. Most Torchlighters will probably put in 15 to 25 hours.

Whether or not a federal employee can be release from his job for multiple times is not an issue -- we will consider recording local Torchlighter presentations in order to have their touching stories available even if they cannot be there in person. An ideal volunteer for this role is enthusiastic and positive about the CFC, is a good public speaker (or has the potential to become one, as coaching can be provided) and is well-respected by co-workers and management.

Torchlighters MUST be registered with, and scheduled through, the CFC office to officially participate in Gateway CFC rallies.

Auditor/Data Entry Volunteers

Auditors and Data Entry personnel are the least visible volunteers, but represent a vital link between the contributor and the designated agencies. CFC dollars and designations will be recorded by these federal employees to provide additional assurance that all authorized CFC designations are honored. These volunteers are ideally released from their regular job duties to serve the CFC, potentially handled as full- or part-time in two-week increments, until all campaign receipts are processed. Blocks of 3 or 4 hours at a time, totaling 20 hours is the minimum commitment, although some volunteers are scheduled for much more. The CFC office can be highly flexible with timing of individual schedules, within a 9:00 a.m. to 5:00 p.m. window, Monday - Friday. We welcome volunteers released for full time assignments, and for longer periods as available. With the CFC office in the Robert A. Young Federal Building, federal employees who work in the building or nearby can provide CFC assistance easily on a part time schedule. Assignments start in mid-October and can run through the end of December, as needed. In auditing role, the federal volunteer opens and reviews the contents of campaign envelopes received from federal agencies and reconciles discrepancies. In the data entry role, the volunteer enters the campaign results and pledged designations into the campaign tracking system. They also contact the donor or campaign coordinator in occasions where a pledge card is unclear. Auditors and data entry volunteers sometimes alternate, or do both roles on different days, depending upon work flow requirements. **A successful auditor or data entry person need not be an accountant or bookkeeper, but must have excellent clerical skills, demonstrated exceptional attention to detail, and efficient typing and/or 10-key keyboarding.** These volunteers will receive training in the computer programs (FileMaker Pro and CFC Assistant) used for managing CFC data upon reporting for duty. A key element will also be reliability -- showing up when scheduled or communicating scheduling changes to the CFC office promptly.

Graphic Design

In previous years, federal employee(s) have designed the graphic element for Gateway CFC materials, to be used on the Resource Guide cover, posters, certificates and Celebration Program. Photos have been provided by charities participating in the CFC, and the designer created a local look incorporating the pictures and Gateway elements.

Printing

In previous years, federal office(s) have been able to contribute the printing and production of the following pieces:

- Oversized Presentation Checks for the Celebration
- Celebration Programs
- Special Posters

Other Assistance

In 2006, a federal office donated the video taping, editing and dubbing of Torchlighter presentations. This was a great help to the community, as it leveraged federal employees' messages efficiently. We would hope to continue to improve upon this practice.

Principal Combined Fund Organization (PCFO) Staff Responsibilities

The PCFO is contracted and supervised by the Local Federal Coordinating Committee. Earth Share of Missouri is contracted to serve the 2009 Gateway CFC. Earth Share started serving the Gateway CFC as PCFO in April 2004 for the fall 2004 campaign cycle.

PCFO responsibilities are:

- Furnish historical account data to the campaign leadership team.
- Compile current data on federal agencies employee numbers
- In consultation with Campaign Leadership Committee, order campaign materials, schedule and coordinate major Kickoff events and the season-end Celebration.
- Coordinate logistical support for team meetings and campaign events.
- Train and work closely with all Campaign Representatives to run the campaign.
- Coordinate, schedule and confirm charity speakers for office rallies (about 120 per campaign season)
- Prepare and pre-pack all campaign materials for each account.
- Train and supervise the auditor and data entry volunteers.
- Provide complete training and day-to-day assistance for all CFC volunteers.
- Provide progress reports and strategy recommendations throughout campaign.
- Manage finances for the campaign, including handling all receipts and distributions to charities.
- Work with the LFCC finance committee and auditor.
- Report to OPM as required.
- Analyze campaign results, prepare reports, and submit recommended improvements for future years.
- Follow through on the tasks outlined in the Memorandum of Agreement, as signed between the PCFO and the LFCC; the full document is available upon request.