

COMBINED FEDERAL CAMPAIGN Central Maryland

2001 SCOPE OF WORK FOR

Principal Combined Fund Organization

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[Purpose](#)

[Authorization](#)

[Responsibilities](#)

[Application](#)

[Key Elements](#)

[Deliverables](#)

[Budget Format](#)

[Return to the On Line Table of Contents](#)

CENTRAL MARYLAND COMBINED FEDERAL CAMPAIGN

SCOPE OF WORK**PRINCIPAL COMBINED FUND ORGANIZATION (PCFO)**
MARCH 1, 2001 TO FEBRUARY 28, 2002**I. PURPOSE:**

The Local Federal Coordinating Committee (LFCC), a committee of the Baltimore Federal Executive Board (BFEB), is soliciting applications from federated groups, charitable organizations or a combination thereof, interested in being considered to serve as the Principal Combined Fund Organization (PCFO) for the 2001 Central Maryland Combined Federal Campaign (CFC). A legal notice has been published in the local newspapers in accordance with Title 5, Code of Federal Regulations, Part 950.104(c), which requires that the LFCC publish a notice no later than February 1 of the calendar year.

The purpose of the scope of work (SOW) is to outline the regulatory requirements, performance expectations and deliverables needed to operate the Central Maryland Combined Federal Campaign for an organization to function as a PCFO.

II. AUTHORIZATION:

Title 5, Code of Federal Regulations, Part 950.104 authorizes the LFCC to solicit applications from federations, charitable organizations, or combinations thereof to serve as the PCFO; and to select a PCFO to act as its fiscal agent and campaign coordinator for the CFC.

Title 5, Code of Federal Regulations, Part 950.105 outlines the responsibilities of the PCFO. In addition, § 950.601 provides additional requirements governing the release of contributor names.

III. RESPONSIBILITIES:

Title 5, Code of Federal Regulations, Part 950, 105(d) outlines the responsibilities of the PCFO, which are summarized below, but are not limited to the following: (a copy of the CFC regulation may be obtained at www.opm.gov/cfc/.)

- A. Honors employee designations.
- B. Works with agency campaign officials to ensure no employee is coerced in any way regarding participation in the campaign. Informs the LFCC of any allegations of coercion brought to the attention of the PCFO.

- C. Provides training for Loaned Executives, coordinators and key workers in accordance with section 950.105(d)(3) of the regulation.
- D. Ensures that no employee is questioned in any way as to his or her designation or its amount in accordance with section 950.105(d)(4) of the regulation.
- E. Prepares the annual pledge card and brochure consistent with the regulations and OPM instructions. Submits all campaign materials to the LFCC for approval.
- F. Honors employee requests that their name not be released to organization(s) that they designate in accordance with section 950.105(d)(6) of the regulation.
- G. Maintains a detailed schedule of PCFO actual CFC administrative expenses in accordance with section 950.105(d)(7) of the regulation.
- H. Keeps and maintains CFC financial records and interest-bearing bank accounts separate from the PCFO's internal organizational financial records and bank accounts. Interest earned on all CFC accounts must be distributed in the same manner as undesignated funds pursuant to Section 950.501. Additionally, interest earned on these bank accounts must be reported on the OPM Form 1417 and reported separately to the LFCC with a copy of the OPM Form 1417. All financial records and bank accounts must be kept in accordance with generally accepted accounting principles.
- I. Submits to the LFCC an audit of collections and disbursements for each campaign managed, in which the last disbursement is made. The audit must be performed by an independent certified public accountant in accordance with generally accepted auditing standards and OPM guidance.
- J. Absorbs the cost of any reprinting of campaign materials due to the PCFO's noncompliance with these regulations, embezzlement, or loss of funds. The PCFO must also absorb campaign costs exceeding 10 percent of the approved budget.
- K. Designs and implements CFC award programs, which are accessible to all employees, subject to the LFCC's approval, and in accordance with section 950.105(d)(11) of the regulation.
- L. Produces any documents or information requested by the LFCC and/or the Director, CFC Operations, OPM, with 10 calendar days of the receipt of that request.
- M. Responds, in a timely and appropriate manner, to reasonable inquiries from participating organizations.

IV. APPLICATION:

All application proposals submitted for consideration must be received by the LFCC no later than noon 12:00 p.m., Friday, February 23, 2001. Interested organizations should submit their application proposals to the LFCC c/o Baltimore Federal Executive Board, Suite G-13, Fallon Federal Building, 31 Hopkins Plaza, Baltimore, Maryland 21201. Only application proposals addressing all of the key elements and deliverables outlined herein will be considered for review by the LFCC.

V. KEY ELEMENTS:

Application proposals must contain a description of the key campaign elements contained herein.

- A. Describe how the PCFO will conduct an efficient and effective campaign, under the direction of the LFCC. The description should explain how the CFC would be supported as a separate campaign; apart from the applicant organization's own campaign or other campaigns for which it serves as a contractor.
 1. The plan must include a line item budget that details all estimated costs required to operate the CFC. The budget should contain sufficient details for the LFCC to understand the cost associated with operating CFC. Submission of a budget containing only major line items is not enough. Major budget categories must include itemized salaries, supplies, rental and maintenance of equipment, printing and artwork, promotion and public events, special events, and staff and volunteer development services, including direct and indirect variable costs, and direct and indirect fixed costs. See Exhibit A for details on itemized budget categories.
 2. The budget should be prepared based on projected expenses and not based on a percentage of the funds raised in the campaign.
 3. In the event that suitable office space becomes available in the Fallon Federal Building to house the CFC Loaned Executives, provide a detailed description and cost of how the PCFO would provide (lease) office equipment (computers, printers, and a copier), telephones and voice mail services, and facsimile equipment to support the LEs at an off-site location.
- B. Describe how the PCFO will afford federated groups and agencies with representatives in the Central Maryland CFC area in the local campaign adequate opportunity for input regarding the overall campaign, including print campaign materials and training.

1. Describe the process that federated groups and agencies must use to attend/participate in approved campaign meetings kick off events, charity fairs, and training sessions.
 2. Describe the process that will provide federated groups, agencies, and the general public the opportunity to review at the PCFO office all reports, budgets, audits, training materials, and other records pertaining to the CFC.
- C. Describe how the PCFO will provide administrative support to the LFCC, including, but not limited to, the following services:
1. Maintain minutes of LFCC meetings.
 2. Assist the LFCC to identify a senior agency official to serve as the Campaign Chairperson.
 3. Assist the LFCC to identify and solicit loaned executives from local federal agencies to assist in the campaign.
 4. Assist the LFCC to establish a network of employee key workers and volunteers in local federal agencies to carry out the campaign.
 5. Assist the LFCC to ensure that, to the extent reasonably possible, every employee is given the opportunity to participate in the campaign.
 6. Identify and obtain locally, regionally, or nationally recognized celebrities to serve as keynote speakers or presenters at special Central Maryland CFC events including, but not limited to, the CFC Kick Off Event and Award Celebration Ceremony. The PCFO will make every effort to obtain these speakers or presenters pro bono or at minimal cost to the campaign. All speakers and presenters are subject to LFCC approval.
 7. Provide mailing lists and mailing labels in support of the annual local applications process.
 8. Provide campaign absolute, statistical, and comparative information monthly during the campaign and as needed, thereafter. Such information must include at a minimum the following data:
 - i. Agency identification information,
 - ii. Current year and a minimum of three additional years of information for:
 1. Number of employees,
 2. Number of donors,
 3. Percentage of participation,

4. Total amount pledged/contributed,
 5. Percentage change in giving,
 6. Per capita gift,
 7. Average gift,
 8. Number of leadership donors, and
 9. Amount pledged by leadership donors.
 - iii. Summary information for the items above, and
 - iv. Summary information by agency types:
 1. Post Office,
 2. Military,
 3. Regulatory Agencies, and
 4. Judicial and Law Enforcement Agencies.
 9. Develop and distribute the materials for promoting the annual “Theme and Logo” contest. Provide the LFCC all the submissions meeting the contest criteria.
 10. Disseminate information to the federal workforce that the LFCC deems appropriate, including, but not limited to agency dates for key CFC events, an errata sheet correcting errors found in the Contributor’s Guide, LFCC advisories, and campaign survey instrument, as required.
- D. Describe the proposed campaign strategies for the 2001 campaign and an analysis of the 2000 campaign results, and the PCFO’s assessment of the 2000 campaign strengths/weaknesses.
- E. Describe the procedures for ordering, delivering and tracking campaign materials.
- F. Describe the internal policies and procedures to be used to safeguard the use of the CFC logo, CFC references, and/or contributor names on or included in invitation notices, letters, or promotional materials without prior LFCC approval.
- G. Describe the internal policies and procedures to be used to safeguard CFC donor recognition awards and promotional materials.
- H. Provide a planning calendar that identifies key campaign events and milestones:
1. Campaign cabinet meetings,
 2. Review of campaign strategies based on previous campaign results and the PCFO’s assessment of the previous campaign strengths and weaknesses,
 3. National and regional workshops and conferences,
 4. Release of information and reports required by regulation,
 5. Review and update agency account profiles,
 6. Collection of agency employment and chair/vice chairpersons and coordinator information,

7. LFCC review of donor recognition awards,
8. Planned agency head visits,
9. Interviewing of prospective Loaned Executives,
10. LFCC review of campaign materials, i.e., pledge card, Contributor's Guide, posters, donor recognition awards, reports, invitations, and "thank you" items, etc.,
11. LFCC review of training materials for LEs, Coordinators and Key workers, Campaign events such as the Kick Off and Final Event,
12. Publication and distribution schedule for campaign materials to participating federal agencies,
13. Training schedule for LEs, Coordinators and Key workers,
14. Web site design, development and/or updates.

VI. DELIVERABLES:

A. Regulatory Requirements.

1. Provide to the LFCC all of the deliverables described in 5 CFR 950.105 and 950.401 (a) within the timetables described therein.
 2. In addition to the regulatory requirements for publication of the annual Contributor's Guide, the 2001 Contributor's Guide will include the following additional information:
 - a. The name and sponsoring agency of each Loaned Executive,
 - b. Prominently display the Central Maryland CFC web page URL on cover #1 and cover # 4;
 - c. An Alphabetical Index placed in the front pages of the Guide listing the four-digit code, organizational name, and page location for each organization listed in the Guide;
 - d. A Numerical Index in ascending order inserted after the Description of Organizations that contains the four-digit code, organizational name and page location for each organization listed in the Guide;
 - e. Pictorially display the 2001 CFC donor recognition awards; and
 - e. A letter provided by the Campaign Chairperson or LFCC to be placed in the front portion of Guide.
- B.** In addition to the regulatory requirement under Section 104 (c) to post a public notice soliciting applications for the PCFO, the public notice will be posted in the following local newspapers: The Baltimore Sun and the Washington Post.

A copy of each newspaper notice announcing the solicitation of applications for PCFO will be provided to the LFCC no later than February 1, 2001.

C. Reports, Briefing Materials, Listings, and Labels.

1. Provide to the LFCC management information reports describing the campaign results including absolute, statistical, and comparative data monthly during the campaign and as needed, thereafter. These reports should provide campaign data for the current year and a minimum of three previous years. Management information reports should include, but are not limited to “corporate/employee report by structure,” “corporate history,” “corporate giving levels,” and “recipient organizations.” Provide to the LFCC a complete set of management information reports for the 2000 campaign within three months after the completion of the annual campaign or no later than March 16, 2001. *This requirement does not apply to applicants other than the United Way of Central Maryland, the 2000 PCFO.*
2. Provide to the LFCC mailing lists and pre-printed mailing labels for all local unaffiliated organizations and local federations that participated in the 2000 CFC, as needed.
3. Provide to the LFCC a detailed report of actual CFC administrative expenses with, to the extent possible, itemized receipts. The expenses report must be in a format that can be reconciled with the PCFO’s budget submitted in accordance with the campaign plan. The report of actual CFC administrative expenses must be provided to the LFCC no later than February 23, 2001 or a mutually agreed upon delivery date. *This requirement does not apply to applicants other than the United Way of Central Maryland, the 2000 PCFO.*
4. Provide to the LFCC, for approval, minutes of LFCC meetings within five (5) working days after the meeting.
5. Provide to the LFCC a copy of the OPM form 1417 when submitted to OPM. The OPM form 1417 for the 2000 campaign will be transmitted electronically via E-mail to OPM. The copy may be transmitted to the LFCC at comf19@aol.com. Additionally, interest earned on the bank accounts used to deposit CFC contributions must be reported on the OPM Form 1417 and reported separately to the LFCC. *This requirement does not apply to applicants other than the United Way of Central Maryland, the 2000 PCFO.*
6. Provide to the LFCC a copy of the PCFO notice to federations and organizations of the amount designated, if any, and the amount allocated from undesignated contributions by February 16, 2001. *This requirement*

does not apply to applicants other than the United Way of Central Maryland, the 2000 PCFO.

7. Provide to the LFCC by February 16, 2001, a copy of the list of donors that requested their name and address to be released to recipient organization or an affidavit indicating that the list of donors was submitted. *This requirement does not apply to applicants other than the United Way of Central Maryland, the 2000 PCFO.*
8. Provide to the LFCC a copy of the notice to federations and organizations of the initial disbursement or affidavit indicating that the initial disbursement occurred on June 1 and quarterly thereafter. *This requirement does not apply to applicants other than the United Way of Central Maryland, the 2000 PCFO.*
9. Submit to the LFCC an audit of collections and disbursements for the 1999 campaign disbursements no later than June 15, 2001. *This requirement does not apply to applicants other than the United Way of Central Maryland, the 2000 PCFO.*
10. Provide to the LFCC a comprehensive list of campaign awards and incentives, the amount to be purchased, and cost for the 2001 campaign; and an accounting of the awards and incentives used in the 2000 campaign including the amount distributed and the surplus amounts.

D. Publications, Training Materials and Web Site.

1. Design, develop, and submit to the LFCC for approval prior to publication all campaign promotional materials including, but not limited to: letterhead paper and envelopes, posters, invitations to special events, theme and logo contest posters and applications, video, Contributor's Guide, Coordinator/Key Worker Guide, certificates and award plaques, donor recognition awards, campaign forms and reports in a timely manner.
2. Design, develop, and submit to the LFCC for approval prior to publication the CFC training materials for the Loaned Executives and Coordinators/Key Workers.
3. Design, develop, and submit to the LFCC for approval all web pages prior to launching. The CFCCMD web site should provide the following minimum pages:

- a. Front page (welcome) should include the campaign logo and theme, summary results from the 2000 campaign, and a visitor counter. This page should have buttons (page links) for each of the primary pages available on the site.
- b. The Primary pages should be similar at the pages contained in the 2000 CFCCMD website (the current CFCCMD web pages can be viewed on the Internet at www.cfccmd.org) and the following new pages:
 - i. An events notice page, announcing planned events by type, date, and location. This page should describe how a charitable organization can participate in each event, if appropriate, and it should provide a contact name and telephone number or E-mail address for each event. This page will require updating as needed.
 - ii. An LFCC page (to post LFCC Notices and Advisories).
 - iii. Exit survey asking the visitor's opinion about the web site and the Central Maryland CFC. These questions are to be developed in conjunction with the LFCC.
 - iv. An event page for the Federal CFC Retiree Pilot Program.

EXHIBITS

Exhibit A Budget Format

**2001 Campaign Budget
March 1, 2001 – February 28, 2002**

	Approved <u>2000</u>	2000 <u>Actual</u>	Proposed <u>2001</u>
Salaries			
Direct ⁱ			
Indirect ⁱⁱ			
Employee Benefits			
Direct			
Indirect			
Payroll Taxes			
Direct			
Indirect			
Total Payroll Related Expenses			
Direct			
Indirect			
Annual Audit			
Campaign Processing			
Supplies			
Office			
Campaign			
Telephone			
Office			
Campaign			
Postage & Shipping			
Occupancy			
Staff			
Loaned Executives			
Warehousing			
Equipment			
Rental			
Maintenance			
Website			
Design and Development			
Maintenance and Update			
Legal Notice			

	<u>Approved 2000</u>	<u>2000 Actual</u>	<u>Proposed 2001</u>
Printing			
Contract			
Campaign Materials			
Stationary and Reports			
Internal			
Campaign Materials			
Stationary and Reports			
Campaign Events			
Direct (CFC only)			
Indirect (UWCM Sponsored)			
Campaign Promotion			
Campaign Video			
Awards			
Local Transportation			
Special Events			
Staff & Volunteer Development			
Total Expenses			
Campaign Projection			
Percent of CFC Expenses to Campaign			

ⁱ Direct costs are those costs directly associated with the day-to-day operations of the CFC.

ⁱⁱ Indirect costs are those cost managerial and administrative cost supporting the operations of the CFC.