

WASHINGTON STATE
COMBINED
FUND DRIVE

2015

Local Coordinator Handbook



www.cfd.wa.gov

Thank you for supporting the Washington State Combined Fund Drive, located in Olympia, Washington. The Combined Fund Drive is registered with Washington State's Charities Program as required by law and additional information is available by calling 800-332-4483 or visiting www.sos.wa.gov/charities.

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Created in 1984, the Combined Fund Drive (CFD) was established to provide one avenue through which Washington state agency and higher education employees can raise money for charities. Employees can give through payroll contribution or at agency fundraising events. The CFD conducts an annual giving campaign during the final three months of the year, raising millions of dollars for local, national and global charities.

Our Mission

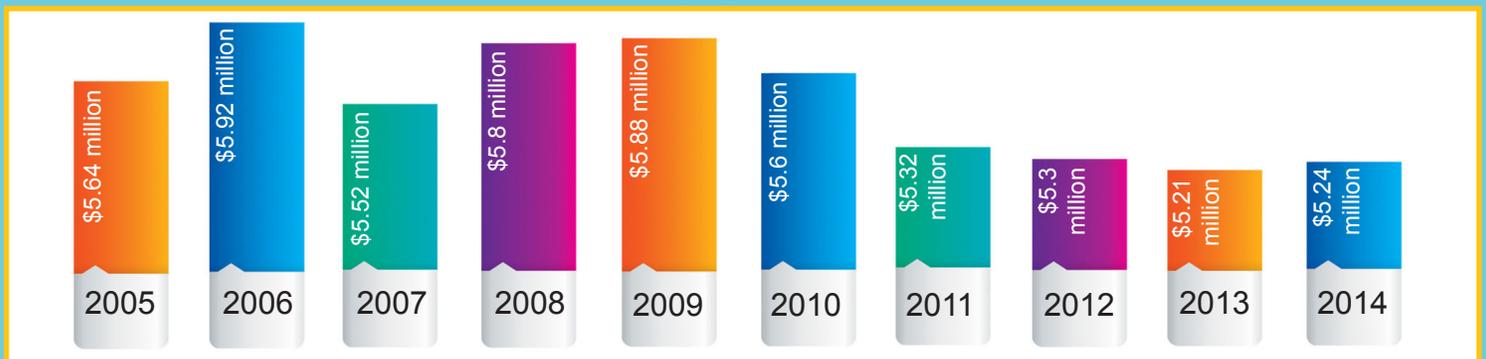
To empower Washington public employees and retirees to strengthen their communities through the funding and support of charities.

Our Values

- We connect state employees and retirees to improve our world, state and local communities through charitable involvement.
- We strive for excellent customer service when dealing with each of our stakeholders.
- We value and respect employee choices by providing the widest range of giving opportunities.
- We value innovation that best serves the needs of employees, retirees and the charities they support.
- We consistently improve our operations to increase accessibility and participation.
- We value and feel it critical to foster a partnership among the federations and charities, the CFD Committee, the CFD staff and state employees.

Ten Year Campaign Results

Annual pledges since 2005



Facts and FIGURES

\$ 120 million

The total dollar amount raised by the Combined Fund Drive since the program began in 1984.

\$5.24 million

The total number of pledged dollars that were raised during the 2014 Annual Giving Campaign.

4th

Washington State's rank amongst all of the other public employee giving programs throughout the country. Despite ranking thirteenth in population, Washington State trails only Texas, New York and California in annual giving by public employees.

16,466

The total number of donors that pledged to give through payroll contribution with the CFD during the 2014 Annual Giving Campaign.

875

The number of registered volunteers that helped administer the Annual Giving Campaign in 2014.

31

The number of years the CFD has been a program. It was officially created in 1984 and the first campaign was conducted in 1985.

5,590

The number of active charities currently enrolled in the CFD.

\$243,472*

The amount of money that has been saved by charities through the hours logged in the Volunteer Tracker by state and higher education employees and retirees.

*This number is based on an estimate of \$26.72 per hour saved by charities through volunteerism. This is according to the Independent Sector, which conducted a salary survey across the United States. For more information visit: https://www.independentsector.org/volunteer_time

How to GIVE Types of Giving

Payroll contribution

The best way for employees to connect with their favorite charities in a consistent, safe fashion is through payroll contribution. The CFD offers four different methods:

Monthly Contribution

This is the most common method of giving used by our donors. Nearly \$4.4 million of the funding that comes through the CFD is from recurring monthly donations.

These ongoing dollars are the most important resource for our charities. Our member organizations can use these pledges to set budgets and ultimately keep their own administrative costs low.

Monthly Deductions are split in half and taken from each paycheck during the month.

One-Time Contribution

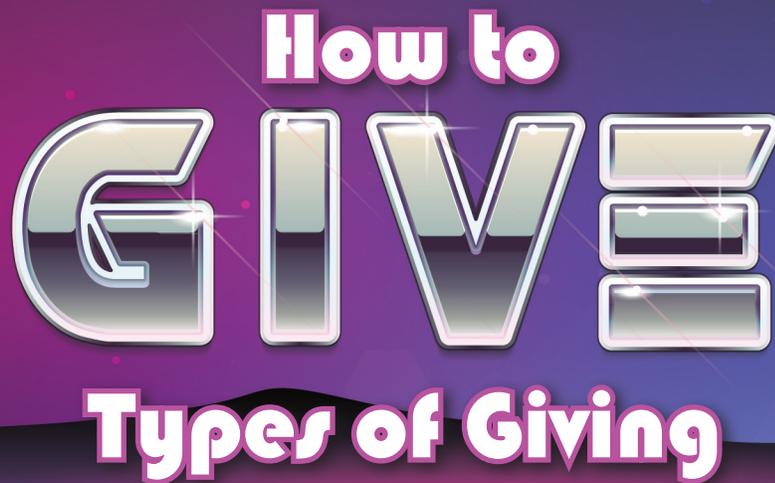
The one-time contribution is the second most popular form of giving through the CFD.

An employee chooses a single paycheck to deduct the contribution from and the funds are taken out one time. Donation is not recurring.

Limited-Time Contribution

An employee choose a specific length of time and the contributions are taken out of their paychecks until the chosen end date. They are not recurring.

*Recurring Limited Time is no longer an option in the CFD. However, certain state employees have had their donations grandfathered in to continue as recurring limited-time donations.



How to **GIVE** Types of Giving

Fundraising Events

Fundraising events are one way to encourage fellow employees to give to charity. Chili cookoffs, silent auctions and coin drives are just a few ways to raise money.

Volunteers can choose where they want the money from their event to go. The money will remain in the CFD account until the end of the campaign. Funds given to the CFD non-specified account are divided amongst each charity in proportion to the amount of specified funds they receive.

Personal Checks

Donors can also choose to give using personal checks. The CFD cannot accept checks made payable to a specific charity. The check is to be made payable to the Combined Fund Drive and must be accompanied by a paper contribution form highlighting the charity that is being donated to.

Credit Cards

The CFD offers donors the opportunity to use their credit cards to donate to their favorite causes. This feature is available only for fundraising events or disaster relief campaigns and must be requested by your Campaign Leader. Credit cards can be used for fundraising events that are dedicated to specific charities.

PAYROLL CONTRIBUTION - HOW TO GIVE

Online Giving

Donors can manage their accounts online by visiting www.cfd.wa.gov and clicking on the “Donor Sign-In” box at the top of the page using their employee ID number, donors can give any time. Donors can also give through the CFD search engine.

Paper Contribution Forms*

Employees can also give to charity by filling out a paper contribution form and specifying the charity of their choice. The form must be filled out, signed and sent to the CFD state office for processing.

*If a donor uses a paper form, he/she must still register at www.cfd.wa.gov to manage his/her account online.

How to GIVE



The CFD recognizes that sometimes giving money just isn't an option for everybody. For our member charities, giving time can be just as crucial in saving money as receiving a monetary donation.

Since 2013, the Combined Fund Drive has been tracking volunteer hours that state employees log with any of our member charities. At the end of the campaign, special recognition is given to agencies who log the most hours.

Search

Find a charity using the CFD search engine by name, type, county served and more

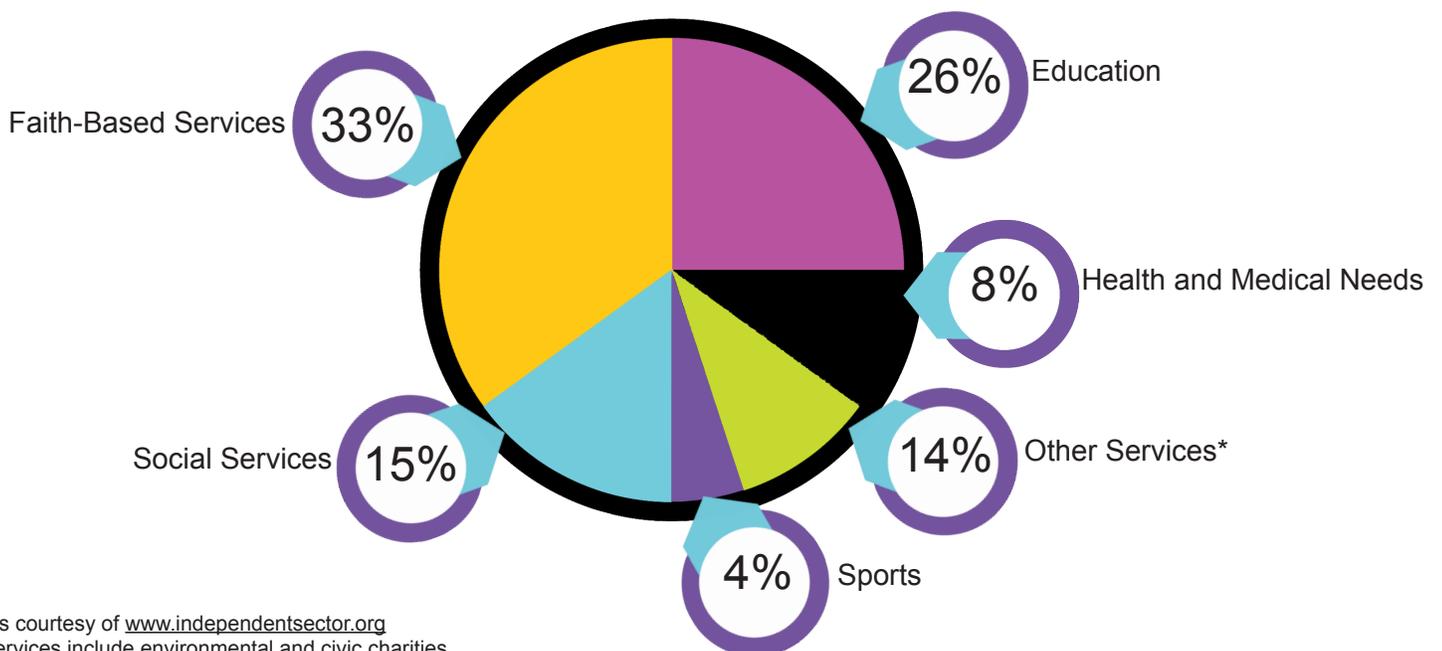
Log

Donors can log volunteer hours with any CFD member charity through the search engine or their donation account

Get Recognized

Agencies will be rewarded for logging the most volunteer hours at CFD recognition events

Below is a nationwide breakdown of the different sectors of service that use volunteer assistance:



Statistics courtesy of www.independentsector.org
Other services include environmental and civic charities



Local coordinators are the heart of the Combined Fund Drive, the state's workplace giving campaign. As a Local Coordinator, you are responsible for running and promoting the campaign locally in your agency or department.

Your Role

Recruit

- Recruit volunteers from your agency to assist with the campaign.
- Look for a diverse group of volunteers who fill a need (marketing, public speaking, event planning, etc.)

Educate

- Educate colleagues about the many benefits to employees and charities of giving through the CFD.

Communicate

- Let your leadership know what's going on in the campaign, and keep your co-workers up to speed about happenings within the CFD.
- Make sure your team knows what your plans are for the campaign and your expectations of them.

Set goals and themes

- Setting goals and crafting a theme are two great ways to be successful.
- Your theme doesn't always have to be monetary or statistical. Crafting a theme that resonates emotionally with your office or division works well too.

Make the Ask

- Provide opportunities for colleagues to contribute to their favorite charitable organizations via payroll deduction or check.

Six Steps to a Successful CAMPAIGN

STEP

1

UNDERSTAND YOUR ROLE

The volunteers you recruit and the coworkers who wish to donate will have questions about giving their time and money to this effort.

Here are just a few ways you can gain the knowledge you need to succeed:

- Attend coordinator trainings, coordinator kickoff events and charity fairs.
- Network with other coordinators.
- Explore the CFD website at www.cfd.wa.gov
- Use CFD staff as a resource.

STEP

2

GET LEADERSHIP SUPPORT

By taking on the role of Campaign Leader, you're showing that you're willing to take on a leadership role, but you'll need support along the way.

Here are just a few ways to make sure your leadership is engaged:

- Meet with your manager and ask them to send emails, sign letters or include CFD as agenda item at management and staff meetings.
- Get your leadership to participate in events.
- Keep your manager informed along the way.

STEP

3

BUILD YOUR TEAM

The most effective campaigns are run by volunteers who are each great at something, but not all great at the same thing.

Consider these tips when building your team:

- Recruit other enthusiastic, excited, passionate people from all areas of your unit, different job classifications, etc., to help you with the campaign
- Give everyone a role: website, marketing, event planning, etc.
- Set goals

Six Steps to a Successful CAMPAIGN

STEP

4

CREATE YOUR CAMPAIGN PLAN

Before you hold an event or campaign, develop a plan that fits the culture of your agency or higher education institution.

Here are some tips to keep in mind when designing your campaign plan:

- Implement your plan according to your own timeline.
- Include a communication strategy.
- Be sure to get on agendas for meetings.
- Initiate first and last week to give strategies.

STEP

5

PROMOTE YOUR CAMPAIGN

Now it's time to let the world know what you're doing to help your community and what they can do to help.

Remember these tips when you begin asking donors to give:

- Be enthusiastic and excited!
- Schedule charity speakers.
- Let everyone know what their dollars are doing in the community.
- Use your resources, including facts, publications, website, charity guides, newsletters, games, and emails.

STEP

6

RECOGNIZE AND THANK YOUR TEAM

Studies have shown that companies whose management team gives praise to their employees are more profitable.

Here are just a few of the people you should consider recognizing:

- Management for supporting CFD and you.
- Your team for helping make the campaign a success.
- Your coworkers for considering giving to their favorite charities through CFD.
- Your charity participants.



Campaign TIMELINE

Campaign Start Date: October 1, 2015



Campaign End Date: December 31, 2015

	<u>Date</u>	<u>Completed</u>
Attend coordinator training:	_____	_____
Create campaign plan including timeline	_____	_____
Meet with supervisor to discuss campaign plan:	_____	_____
Recruit campaign team:	_____	_____
Set up team planning meetings:	_____	_____
Schedule presentations at staff meetings:	_____	_____
Schedule charity speakers:	_____	_____
Display posters:	_____	_____
Develop link to CFD on department intranet (if applicable):	_____	_____
Submit fundraiser form and checks to campaign Leader:	_____	_____
Submit nominations for awards ceremony	_____	_____
Execute "Last Week to Give" strategies:	_____	_____
Thank supervisor, colleagues, and team:	_____	_____
Attend CFD appreciation event:	_____	_____



Benefits for Charities

There are many reasons for a charity to be involved with the Combined Fund Drive. Here are just a few:

- **Charities save time and money.** Fewer staff are needed to process individual donations. Charities save the expense of multiple fundraising campaigns, so more dollars go to services.
- **Charities can budget.** Regular donations allow charities to better forecast their upcoming activities.
- **Charities depend on workplace giving.** The Combined Fund Drive is one of the most inexpensive forms of fundraising and one of largest sources of income for charities.
- **Charities reach state employees.** Through the Combined Fund drive, charities have access to over 100,000 state employees to whom they might not otherwise have the opportunity to reach.

Dollar Breakdown of Different Services*

Below are the costs per dollar that charities incur to raise ONE DOLLAR. As you can see, the Combined Fund Drive remains one of the most cost effective ways for charities to raise money.



*Sources: James Greenfield, Fund-Raising: Evaluating and Managing the Fund Development Process (1999), Charity Navigator, and King County Employee Giving Program (2015)



Benefits for Donors

There are many reasons for a charity to be involved with the Combined Fund Drive. Here are just a few:

- **It's Easy.** Simply choose between automated payroll deduction or a one-time gift.
- **It's Safe.** The CFD only lists charities that have been screened and approved.
- **It's Your Choice.** Give to the causes you are most passionate about by choosing from over 4,000 approved charities or writing in your favorite charity.
- **It's Tax deductible.** The CFD can send you a record of your payroll contribution during the year.
- **It's Sustainable.** The member charities of the CFD rely on the steady revenue that comes from CFD donors. Smaller charities could not operate without the money they receive from our donors.

Giving Comparison*

The graphic below shows the average costs associated with giving to your charity directly using various services and how they compare to giving through your paycheck with the Combined Fund Drive.

	<p>Personal Check A personal check written directly to charity routinely costs up to \$20 to process.</p>	<p>Up to \$20 per check</p>	<div style="text-align: center;"> <p>5%</p> </div> <p>WASHINGTON STATE COMBINED FUND DRIVE</p> <p>Giving through your paycheck is still one of the most cost effective ways to give to charities.</p> <p>Giving through the CFD not only competes with most giving options, it beats most of them.</p> <p>And with more than 1,000 volunteers throughout the state, the CFD also engages in campaigns to raise money for charities, working to justify the administrative costs it incurs.</p>
	<p>Mobile Giving Transaction fees, keyword fees and annual set up fees create mounting costs that can affect your gift in big ways.</p>	<p>Up to 10% per text</p>	
	<p>Online Giving Using a credit card to start a recurring gift directly to your charity also has transaction fees with your bank and software creators.</p>	<p>Up to 4-7% per gift</p>	
	<p>Online Giving Even if you choose to use your credit card to give directly at an event, there are still bank fees that come with your gift.</p>	<p>Up to 3-8% per gift</p>	

*SOURCES: Affinity Resources (<http://www.affinityresources.com/pgs/awz55Online2.shtml>), MobileCause.com

CONTACT US



Stephanie Horn

OUTREACH AND EXECUTIVE SERVICES DEPUTY DIRECTOR **Stephanie Horn**

Stephanie is in charge of the Special Programs Division, which houses the Address Confidentiality Program (ACP) and the Combined Fund Drive. She also oversees reception services and event planning at the Capitol Building.

Contact Stephanie if you need help with:

- OSOS policies
- Contacting agency leadership
- OSOS availability for events, communications with elected officials, budgetary spending and overall program changes

stephanie.horn@sos.wa.gov

(360) 902-4193



Philip Kerrigan

CFD PROGRAM MANAGER **Philip Kerrigan**

Philip manages the day-to-day operations of the CFD. He also backs up CFD personnel and establishes connections with community charities, county committees and volunteers.

Contact Philip if you need help with:

- Website requests
- To connect with volunteers and county committees
- Requests for state CFD presence at fundraising events
- Publications and marketing materials associated with the CFD

philip.kerrigan@sos.wa.gov

(360) 902-4182



Heather Lucas

FISCAL AND POLICY COORDINATOR **Heather Lucas**

Heather works with the OSOS fiscal office and IT staff on crucial issues such as charity disbursements, donations, web-based system issues and works with the CFD Program Manager on crafting and monitoring policies and procedures.

Contact Heather if you need help with:

- Reports
- Logging fundraisers
- Disbursement of funds to charity
- Help with donation, reconciliation or payroll contribution issues

heather.lucas@sos.wa.gov

(360) 902-4181



Dawn Sanquist

RESOURCE COORDINATOR **Dawn Sanquist**

Dawn tackles questions and concerns from donors, charities and volunteers. She also works on developing relationships between the community and the CFD.

Contact Dawn if you need help with:

- Donor accounts
- General CFD questions and inquiries
- Requests for fundraising events or donations
- Inquiries regarding reimbursement for fundraising events

dawn.sanquist@sos.wa.gov

(360) 902-4162