

WASHINGTON STATE  
**COMBINED**  
FUND DRIVE





I  
GIVE.



# You are the Architect

## As a volunteer, you help make your community a better place

The Washington State Combined Fund Drive lays the foundation for charities throughout your community by providing year-round funding through payroll contributions and agency fundraising events.

Without volunteers like you, this would not be possible.

As a CFD Campaign Leader, you are the **Architect**: designing your campaign, leading and communicating with fellow volunteers and building the foundation for charities in your community and around the globe.

Within this Toolkit, you'll find the basic building blocks for designing your campaign. The tools, strategies and templates found within this Toolkit, along with videos and promotional materials, can also be found at our website [www.cfd.wa.gov](http://www.cfd.wa.gov) under the Volunteers tab.

Thank you for embarking on this journey with us...now let's get building!



# Six Tools to a Successful Campaign

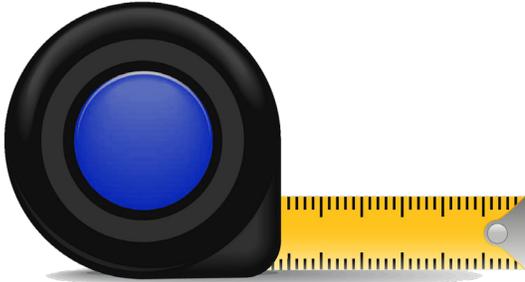
Each year, CFD volunteers come together to create one of the most successful independent workplace giving programs for state employees in the country.

Making a difference in your community is easy if you have a plan and the right tools. To assist our volunteers in crafting a successful campaign, here are six useful tools that are sure to make your campaign a smashing success.

-  1. Understand your role.
-  2. Obtain leadership support.
-  3. Build your team.
-  4. Create a campaign plan.
-  5. Promote your campaign.
-  6. Recognize and say “thank you.”



# Six Tools to a Successful Campaign



## 1. Understand your role.

Since its birth in 1984, the Washington State Combined Fund Drive has been the tool state employees and retirees have used to strengthen their communities through the funding and support of charities. Over \$115 million has been pledged by state employees and retirees in the past 30 years. For the last eleven years, donors have pledged over \$5 million annually, even in difficult economic times. The CFD has become the fourth largest public employee giving campaign (behind Texas, New York and California) while our state population has dropped to thirteenth.

Why tell you all this? In order to understand your role, you need to know the history behind the Combined Fund Drive.

For the past two years, the CFD has been staffed by three full-time employees. We'd never be able to embark on a \$5 million campaign year over year without our volunteers. As a Campaign Leader, your role is to be the face of the CFD in your agency or higher education institution. The volunteers you recruit and the coworkers who wish to donate will have questions about why they should give their time and money to this effort. Instill confidence in them and yourself by learning the benefits of the CFD and charitable giving.

Before launching into your campaign, visit our website at [www.cfd.wa.gov](http://www.cfd.wa.gov) and explore. The About Us section has facts and figures, information on ways to give and volunteer roles. There's a full page of questions and answers under the FAQ section (located at the bottom of the page). There are how-to instructions and videos under the Volunteers tab. If you're interested and able to get out of the office, attend kickoff events and charity fairs at other agencies. Network with other Campaign Leaders and your local county committee.

If you're ever stuck and need help, utilize the CFD staff as a resource. We're here to help you be successful!



# Six Tools to a Successful Campaign



## 2. Obtain 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. The best kind of support for a Campaign Leader is from supervisors, managers and executive leadership. You may

know a lot of people in your agency or higher education institution, but chances are your agency's leadership can reach a lot more people in your agency with a lot less work. Utilize these sources and ask them to become involved in making your campaign successful.

Leadership involvement can be simple, like sending emails of support, introduction or conveying information about your upcoming campaign. Asking your leadership team to attend your events, or even take a role, is a great way for management to show support and encourage others to do the same.

Here are some more great ways to involve your leadership team in making your campaign a success:

- Ask them to support the campaign through giving to charity via the CFD
- Meet with your director/management team and ask them to engage by signing letters and sending emails
- Send an invitation to management for all of your campaign events
- Ask management to send thank you emails to employees for considering giving to the CFD
- Post any communications from management in your breakroom or in other employee common areas
- Add your CFD campaign as an agenda item at management meetings
- Keep your leadership team informed by reporting campaign progress, especially comparisons of this year versus previous years
- Let your management team know about the goals you want to achieve and ask for ideas in achieving them

Obtaining leadership support will help boost any campaign, so make sure to involve your leadership team and ask for their support. Check out our website [www.cfd.wa.gov](http://www.cfd.wa.gov) for email and letter templates and customize them for your agency management.



# Six Tools to a Successful Campaign



## 3. Build your team.

“Teamwork divides the task and multiplies the success.”

The author of this quote is unknown, but definitely correct. Local Coordinators are the volunteers in your agency or higher education institution that you choose to help you and support your campaign. The most effective campaigns are run by volunteers who are each great at something, but not all great at the same thing. Take a look at your coworkers. Do you know someone who's a people-person, great at engaging conversations? Do you have a coworker who's brilliant at design? Who plans the birthday parties and staff events? Who's the person pointing out the missing details in your meetings? What's your biggest weakness but one of your coworkers' biggest strengths? Recruit these coworkers to be a part of your team.

Consider these tips when selecting your Local Coordinators:

- Recruit employees who represent all divisions in your workplace
- Give everyone a role like marketing, event planning, solicitations, etc.
- Select one Local Coordinator for each office location or one for every 50 employees
- CFD is a part of state business: make sure your Local Coordinators understand this and know how to integrate CFD into their workplaces
- Promote the benefits of being a Local Coordinator
  - It looks great on your resume
  - Helping your community benefits everyone
  - You'll learn new skills in planning, organization, oral presentations and written communications
  - Employees get an opportunity to know and work with others in their agency, as well as other agencies and higher education institutions

Many organizations rely on teams and you should, too. For extra guidance in building your team, the Five Week Plan (provided on the next page and online under the Volunteers tab at [www.cfd.wa.gov](http://www.cfd.wa.gov)) is an excellent tool to use to build your team.



# Six Tools to a Successful Campaign



## 3. Build your team with the **Five Week Plan.**

### **Week #1**

**Ideal week: June 23-27**

Log into your CFD account and download the volunteer report for your agency. Contact all the volunteers on your list to see if they are returning for this year's campaign. You can download the Five Week Plan spreadsheet from our website, [www.cfd.wa.gov](http://www.cfd.wa.gov) under the Volunteers tab and use it to keep track of who's returning.

### **Week #2**

**Ideal week: July 7-11**

Gauge the progress of returning volunteers. Keep track of who's returning and who needs to be contacted next week with the Five Week Plan spreadsheet. You can use the week of June 30-July 4 as Week #2, but remember it's a short holiday week.

### **Week #3**

**Ideal week: July 14-18**

Ask your management team to send out a recruitment email to the volunteers who have not responded as well as your agency.

### **Week #4**

**Ideal week: July 21-25**

Repeat Week #3's plan. If you've already confirmed all of your volunteers, skip to Week #5.

### **Week #5**

**Ideal week: July 28-August 1**

Enter your confirmed volunteers into the CFD system. For all of the volunteers who have not returned your emails, assume that they are rejoining the campaign this year.

The ideal weeks are not set in stone, but we hope with this outline, you'll be able to acquire volunteers, start designing your campaign and begin ordering your supplies.

Your volunteers will have access to Local Coordinator trainings beginning in September, so get your volunteers entered into the system and encourage them to attend training to learn about the CFD.





# Six Tools to a Successful Campaign



## 4. Create a campaign plan.

Before you hold an event or campaign, you need to develop a plan. When designing your campaign plan, think about what methods of communication and the types of events that are common at your agency or higher education institution. Do your coworkers enthusiastically attend office parties and all-staff events? Or do your coworkers prefer small engagements or web-based events? Determine what your office culture is and build your campaign around that culture.

Figure out what events you'd like to have and the events your coworkers would like to attend and build your campaign around them. Here are some other tips to keep in mind when designing your campaign plan:

- CFD Campaign dates are October 1, 2014 through December 12, 2014
- Review your agency's past campaigns to identify strengths and areas of improvement
- Talk with former and veteran Campaign Leaders and Local Coordinators in your agency
- Establish a timeline and delegate specific responsibilities to your Local Coordinators with due dates
- Work with your management team and volunteers to establish clear, measurable goals
- Include a communication strategy, schedule meetings and events ahead of time and identify when to send emails
- Plan for the "Last Week to Give" and hold your own personalized LWtG events
  - The Last Week to Give is the last blitz for charitable giving during the official campaign. Each day during the Last Week to Give, the CFD gives away prizes to donors in different size agencies via random drawings (like Seahawk swag and dinner gift certificates). The donors who are eligible for these drawings must give via payroll contribution at some point in the calendar year.

Successful campaigns meet and exceed the goals set out at the beginning of the campaign, but they also include everyone. Designing your campaign based on your office culture is now easier than ever when you start with event templates, ideas and a campaign timeline found at [www.cfd.wa.gov](http://www.cfd.wa.gov) under the Volunteers tab.



# Six Tools to a Successful Campaign



## 5. Promote your campaign.

You've selected your volunteers, detailed the activities you're undertaking, specified how you're measuring successes and you've designated tasks to volunteers. Great! Now it's time to let the world know what you're doing to help your community and what they can do to help, too. The CFD has a multitude of ways in which you can share the accomplishments of your agency volunteers, donors and leadership.

Asking potential donors to become part of the Combined Fund Drive can be done in a number of ways:

- Be enthusiastic, knowledgeable and excited about your campaign
- Schedule charity speakers during your campaign or office events
- Work with your fellow volunteers to coordinate promoting activities
- Find out the impact of a dollar with the Give \$1 campaign and share what a difference one dollar can make in your local community
- Utilize the CFD marketing materials in as many ways as you can: hang posters in common areas like restrooms and breakrooms, share personal stories about giving and craft division or agency-specific materials
- Make the Ask: explain what the CFD is, what it does for your community and don't be afraid to ask others to consider participating-Include everyone in your building or division by creating calendar invites for all of your CFD fundraisers to send to your building or division coworkers, send physical invites or ask them to participate one-on-one
- Challenge your agency: Secretary of State Kim Wyman announced at the 2014 CFD Leadership Breakfast that she will work for any agency for an entire day if they can get 100% employee participation...For more info on Secretary Wyman's Challenge, visit [www.cfd.wa.gov](http://www.cfd.wa.gov)
- Table and distribute marketing publications from the CFD, charities you care about and charities making a difference in your community
- Email Friday Flix videos from [www.cfd.wa.gov](http://www.cfd.wa.gov) featuring donors, charities and volunteers who share why they give
- Forward emails from the CFD office to your volunteer base, management team and coworkers

Everyone has a cause they believe in. For most people, they simply need to be given an opportunity to discuss a cause they believe in and an easy way to support their favorite charities.



# Six Tools to a Successful Campaign



## 6. Recognize and say “thank you.”

The best managers use recognition to engage their employees, retain talent and increase production. Studies have shown that companies whose management team gives praise to their employees are more profitable. Their employees work harder and more enthusiastically for an appreciative boss. As the Architect of your campaign, make sure you don't forget to build gratitude into your campaign plan.

There are a myriad of ways to thank donors and volunteers who participate in your campaign:

- Recognize your team for the little things as well as the big things
- Thank your volunteer team at a staff meeting
- Hand out personalized certificates to your volunteers (if you'd like a certificate signed by CFD Program Manager Philip Kerrigan, visit [www.cfd.wa.gov](http://www.cfd.wa.gov) and go to the “Recognition/Certificates” section under the Volunteers tab)
- Hand out personalized certificates to your donors
- Give CFD swag as gifts for new donors
- Plan a post-campaign recognition meeting or event
- Handwrite thank you cards to each of your volunteers
- Send thank you cards to your supporters, sponsors and charity participants
- Thank your Local Coordinators in your workplace newsletter
- Send an email the day of your CFD event thanking each volunteer and highlight the role they played in the campaign
- Work with your leadership team to send a letter of appreciation for everyone who participated in the CFD
- Give your donors mini I GIVE signs with a personalized thank you on the back

You don't need to do a lot to retain your agency's donors or volunteers. Just say “thank you.” For templates and thank you materials, visit our website [www.cfd.wa.gov](http://www.cfd.wa.gov) and download templates under the Volunteers tab.

# The Campaign Timeline

The CFD annual campaign kicks off in October 2014, but there's a number of events and deadlines that happen throughout the year.

## Important Dates to Remember

Campaign Leader Training	June 12, 18 and 19 2014	Campaign Kickoff	October 1, 2014
CFD Staff mails all Campaign Materials	August 2014	Campaign Results Posted at <b>www.cfd.wa.gov</b>	Ongoing
Local Coordinator Training	September 2014	Turn in Fundraisers	December 12, 2014

## Campaign Planning Checklist

Task	Due Date	Complete
Recruit your volunteer team	June 30, 2014	
Design a campaign plan (send a copy to your CFD Staff Liaison)	July 15, 2014	
Add Local Coordinators and order supplies at <b>www.cfd.wa.gov</b>	July 31, 2014	
Obtain leadership support	July 31, 2014	
Train Local Coordinators	September 2014	
Run your CFD campaign	October - December 2014	
Thank employees, volunteers and donors	November - December 2014	
Transfer fundraiser dollars to the OSOS finance office <small>If your fundraiser is not transferred to OSOS finance by December 12, 2014, there's no guarantee your fundraiser will be disbursed in January 2015. Fundraisers transferred after this date may be disbursed at the next available date, April 2015.</small>	December 12, 2014	
Nominate volunteers for county and/or state awards	December 31, 2014	
Share your agency and statewide results and evaluate your campaign	January 2015	
If available, attend the recognition event in your area	February or March 2015	