



CFD

**2013 CAMPAIGN LEADER
TRAINING HANDBOOK**

www.cfd.wa.gov



Secretary of State
Kris Wynn

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Secretary of State

Kim Wyman



OFFICE OF THE SECRETARY OF STATE

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A Message from Secretary of State Kim Wyman

Greetings,

It is with great honor that I have been called to serve the citizens of Washington. I am especially proud to be leading the volunteers and staff of the Combined Fund Drive.

Programs like the CFD are incredibly important to the fabric of a healthy community, helping those less fortunate and changing lives through simple and effective payroll contribution.

In these tough times, charity and goodwill are needed more than ever. The Combined Fund Drive is just one of the ways our citizens show compassion, and your tireless efforts will no doubt help to make our community better.

It is my goal to continue the legacy provided by those who have come before me, and I look forward to working with agency leadership, volunteers and donors of the CFD to make a lasting impact throughout the world.

Thank you so much for everything you've done. Your time and effort have truly made an impact on the lives of others.

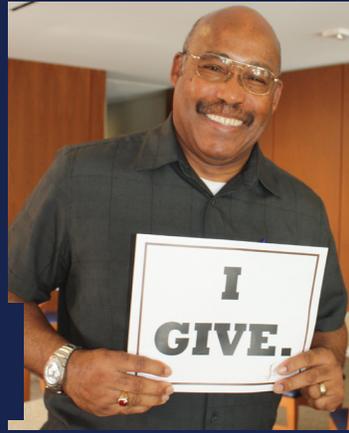
Sincerely,

Kim Wyman
Secretary of State

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WHO WE ARE

Our Vision

Empowering Washington public employees and retirees to strengthen communities through the funding and support of charities.

Our Mission

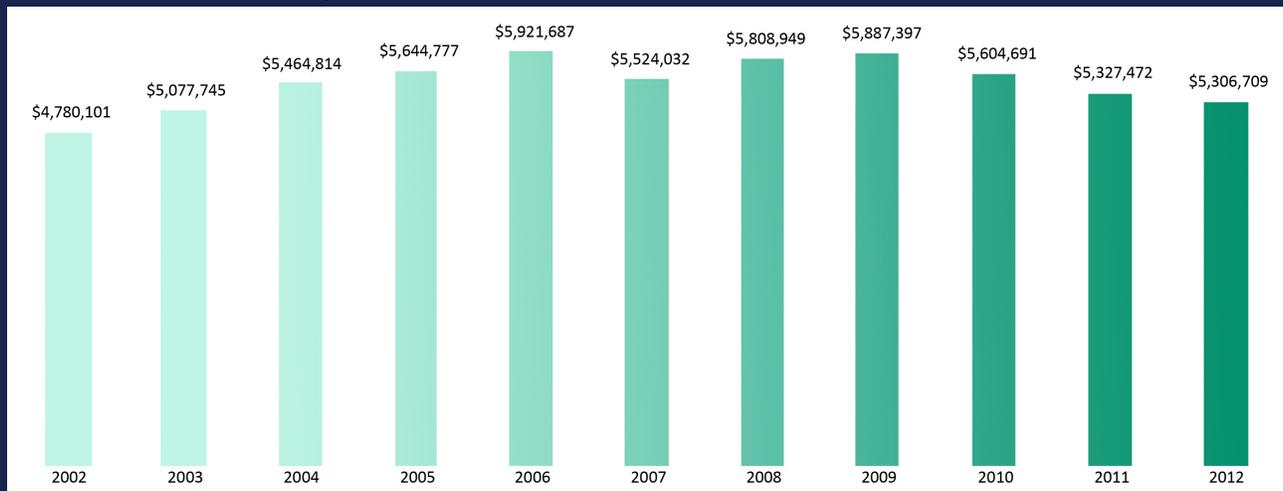
To empower Washington public employees and retirees to strengthen their communities through the funding and support of charities.

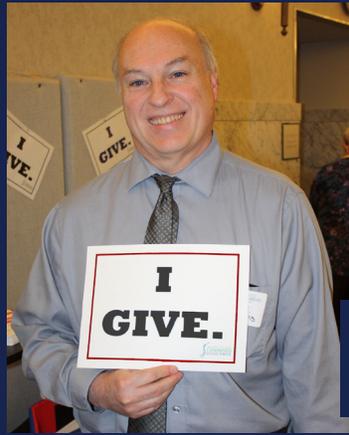
Our Values

- We enable all state employees and retirees to improve state, local and global communities through charitable involvement.
- We value and respect employee choices by providing the widest range of giving opportunities.
- We value innovation and efficiencies that best serve the needs of employees, retirees and the charities they support.
- We consistently improve our operations to increase accessibility and participation.
- We value a partnership among the federations and charities, the CFD Committees, donors and the CFD staff.

28 Years of Growth

Over two decades, the Combined Fund Drive has developed a reputation as one of the best workplace giving programs in the country. Since 1984, employees have pledged more than \$100 million to local, national and global charities through the CFD. Even in difficult economic times, Washington State employees and retirees have pledged over \$5 million annually since 2003.





OUR DONORS

Who is Eligible to Give?

Washington State law currently allows three different kinds of donors to participate in the Combined Fund Drive:

- State employees
- Higher education personnel
- Retirees of the State of Washington

Donors can manage their accounts online by visiting the CFD Donor Sign-up page at our website, www.cfd.wa.gov, or by filling out a paper contribution form and specifying the charity of their choice.

Benefits to Donors

- It's safe
- It's easy
- Anonymity available
- Donors have the choice
- Donations are tax deductible
- Donors have ultimate control

Benefits to Charities

- It's free
- Saves time and money
- Reduces administrative costs
- Provides more dollars for direct services
- Donations are projected in advance to help plan out the fiscal year ahead
- Participating in the CFD can provide access to thousands of potential donors

Largest Contributing State Agency

Total Donors:
2,477

Total Dollars:
\$505,057.09



Washington State
Department of Social
& Health Services

Largest Contributing Higher Education Institution

Total Donors:
4,386

Total Dollars:
\$2,117,828.15



UNIVERSITY of
WASHINGTON



OUR CHARITIES

Charity Requirements

Our member charities range from small community nonprofits to global federations that assist those in need around the world. The charities of the Combined Fund Drive are vetted organizations that must meet the following requirements:

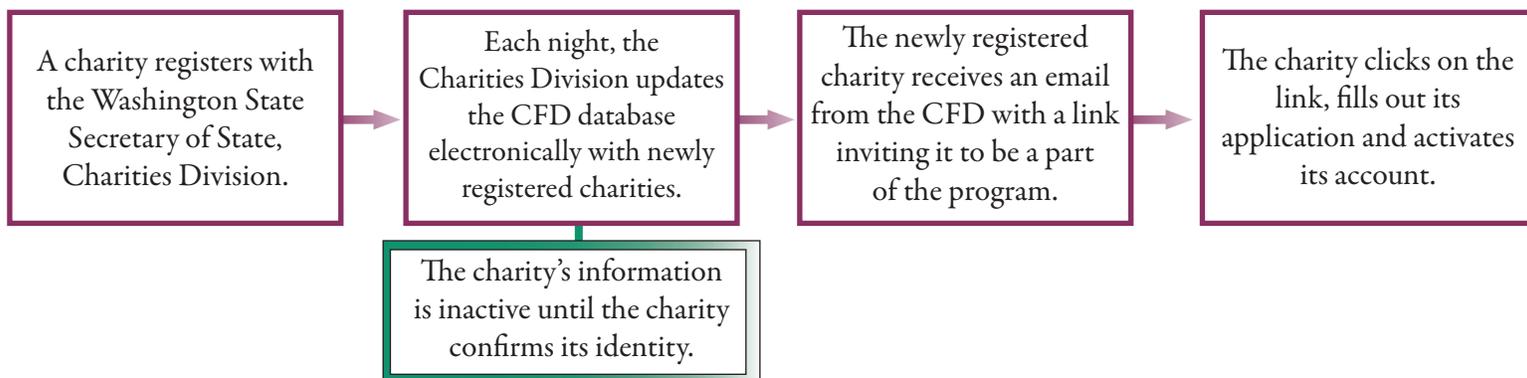


They are registered with the Internal Revenue Service as a charitable organization.

They are registered to do business with the Washington State Secretary of State, Charities Division.



The Application Process



The Top Three Charities of 2012

Below are the three charities that received the most donations from our donors in 2012. For more information on the other member charities in the Combined Fund Drive and what they received, check out the 2012 CFD Annual Report at www.cfd.wa.gov.

1. 
 Combined Fund Drive
 \$332,274.66

2. 
 Northwest Harvest
 \$169,922.79

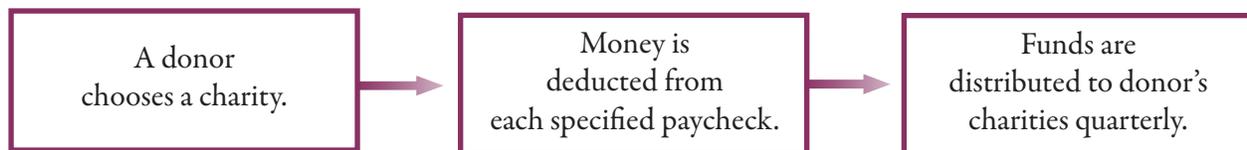
3. 
 Thurston County Food Bank
 \$139,304.16

Payroll Contribution

The best way for donors to connect with their favorite charities in a consistent, safe fashion is through payroll contribution. Donors can give online or by filling out a CFD paper contribution form. The CFD offers four different methods of giving via payroll contribution:

- Monthly
- One-Time
- Limited Time (online only)
- Recurring Limited Time (online only)

How it Works



Why Manage Your Account Online?

The Combined Fund Drive will always accept paper contribution forms, but there are great reasons for donors to use our one-of-a-kind online giving station:

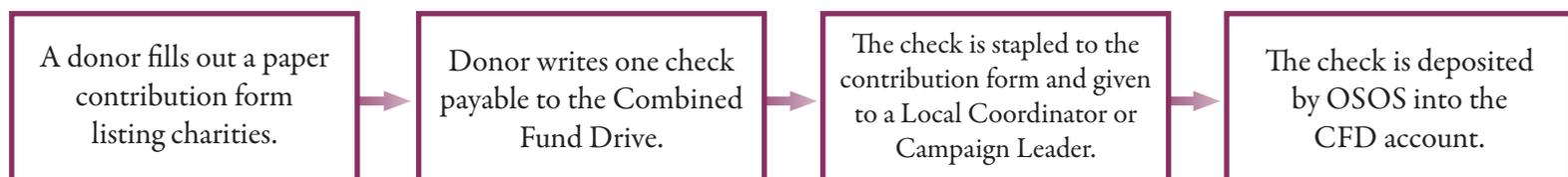
- Secure access
- Donors create their passwords
- Donor accounts are active 24/7
- Donations can be changed any time
- Donors can view their detailed giving history from 2008 on

Donors do not need an online account for donations to be active. If you choose to sign up for payroll contribution with a paper form, you will need to log on to www.cfd.wa.gov in order to activate and manage your online account, but not for charities to receive your donations.

Personal Checks

A personal check may be written to the Combined Fund Drive during the campaign. Checks cannot be made payable to a charity. All personal checks must be made payable to the Combined Fund Drive.

How it Works

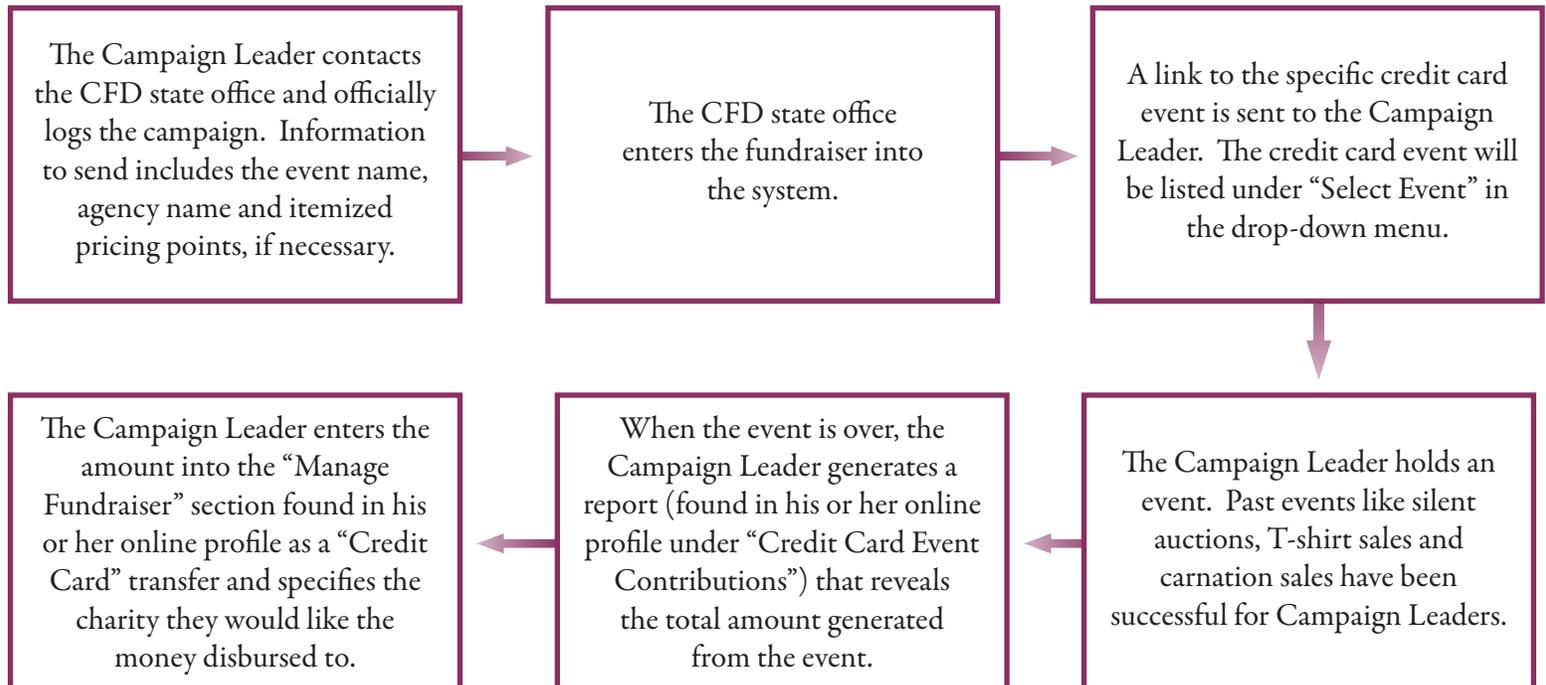


MARKETING YOUR CAMPAIGN

Credit Cards

The CFD website also provides donors with an opportunity to use their credit cards to donate to their favorite causes. Currently, this feature is available only for fundraising events and must be requested by the Campaign Leader. Credit cards can be used for fundraising events that are dedicated to specific charities.

How it Works



When a fundraiser includes both cash donations and credit card payments, all cash handling must follow CFD cash handling procedures. Credit card receipts should be logged and reported separately from checks and cash.

Campaign Resources

There are a number of amazing resources available at your fingertips to run a successful campaign.

- Nonprofit organizations throughout the state can help connect your campaign by providing speakers, videos and demonstrations. Many charities can provide promotional items, facts and figures about how donations are used and material for newsletters.
- The CFD state office provides marketing supplies and support to run a successful campaign. Visit www.cfd.wa.gov to download materials, order supplies or ask questions.
- As a volunteer for the Combined Fund Drive, you are entitled to reimbursement when you purchase promotional items for events associated with your campaign. Reimbursements must be approved by the CFD state office prior to purchase.
- State and higher education employees are allowed to utilize state resources to support their CFD campaign. The amount of resources is left to the discretion of the agency director or higher education president.

MARKETING YOUR CAMPAIGN

The Campaign Timeline

Important Dates to Remember

Campaign Leader Training	June 4, 5, 6 and 12, 2013
Local Coordinator Training	September 2013
CFD Staff mails all Campaign Materials	August 2013

Campaign Kickoff	October 1, 2013
Campaign Results Posted at www.cfd.wa.gov	Ongoing
Campaign End	December 13, 2013

Campaign Planning Checklist

Task	Due Date	Complete
Recruit volunteer team	May – June 15, 2013	
Create a campaign plan (send a copy to your CFD Staff Liaison)	June 15, 2013	
Add Local Coordinators and order supplies at www.cfd.wa.gov	June 30, 2013	
Obtain leadership support	June 30, 2013	
Train Local Coordinators	September 2013	
Run CFD campaign	October - November 2013	
Thank employees, volunteers and donors	November - December 2013	
Transfer fundraiser dollars to the OSOS finance office	December 13, 2013	
Nominate volunteers for county and/or state awards	December 31, 2013	
Share your agency and statewide results and evaluate your campaign	January 2014	
If available, attend the recognition event in your area	Early 2014	

I GIVE.



YOU GIVE.



WE GIVE.



MARKETING YOUR CAMPAIGN

Marketing and Promotion

There are many things you can do to simply and successfully promote the CFD in your workplace:

- Make your message memorable
- Keep your message simple and consistent
- Say your message many times but in different ways
- Invite charity speakers to meetings or special events
- Host imaginative and fun events that promote the CFD
- Use promotional and/or marketing material provided by the CFD
- Schedule a time during an existing meeting to talk about the campaign
- Creatively communicate a consistent CFD message throughout your workplace
- Report to your management and co-workers your progress throughout the campaign
- Familiarize yourself with the advantages of the CFD program and needs in your community
- Ask a co-worker to share a story of how he or she or someone he or she knows was helped by a charity

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.



Fundraising Questions

Are raffles legal?

YES! RCW 9.46.0209 allows state employees to conduct raffles. One very important piece of this law states that raffle tickets can only be sold to employees of your agency or higher education institution.

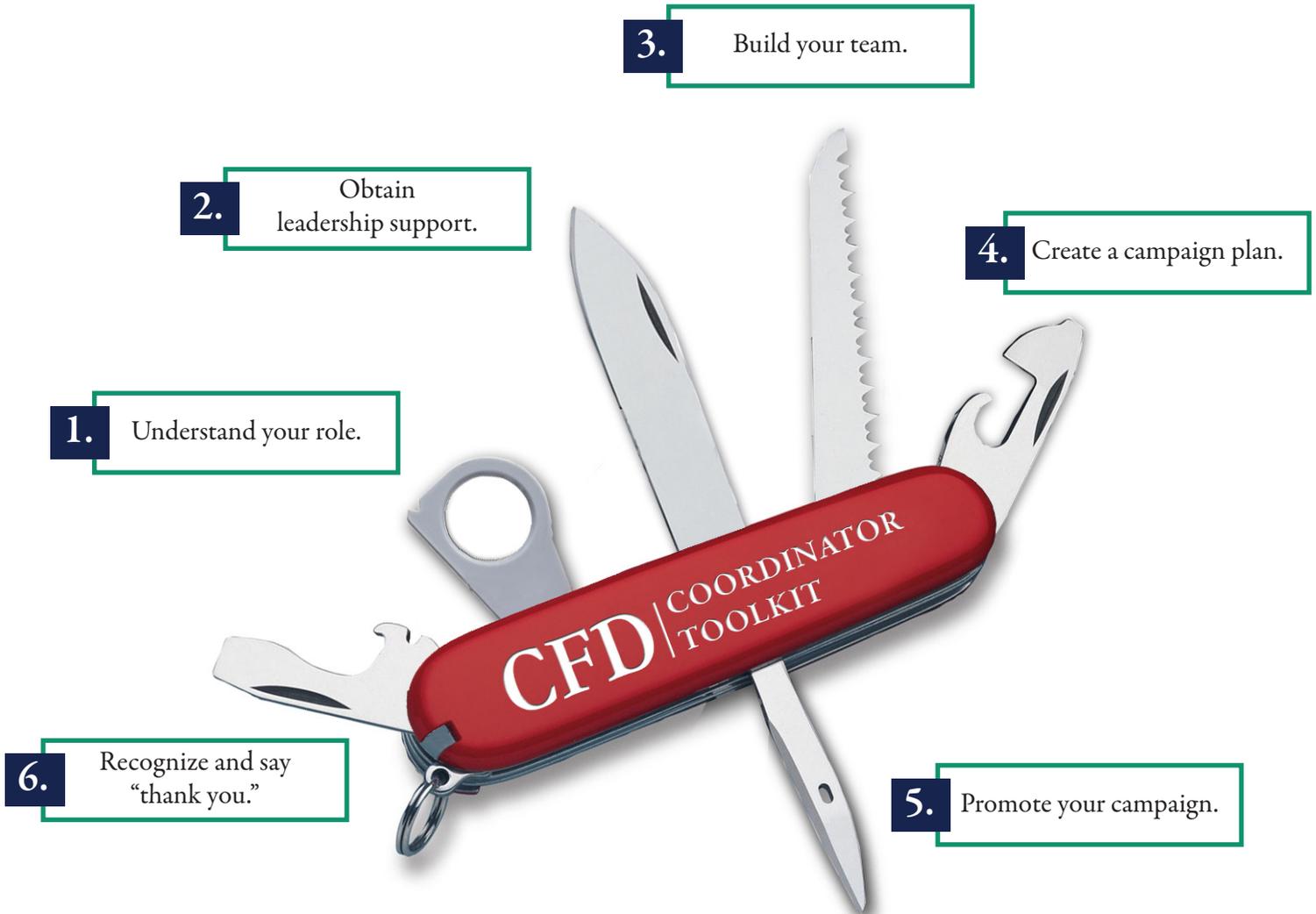
Can I solicit a business for my fundraiser?

YES! According to CFD WAC codes, a volunteer can solicit private businesses for sponsorship or in-kind donations. However, a volunteer cannot solicit as an employee with his or her agency. We recommend that you work with your management to determine your agency's policy on soliciting businesses or contacting vendors. The CFD office is available to provide a solicitation letter on CFD letterhead to help with the solicitation process.

What do I do with fundraiser cash and checks?

Your agency or campus must take every step necessary to properly handle cash and checks that are received during the campaign, including money received during fundraisers. You must involve your fiscal office in this activity.

SIX TOOLS TO A SUCCESSFUL CAMPAIGN



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

To assist our volunteers in changing their communities, the Combined Fund Drive has provided six useful tools that are sure to make our campaign a smashing success.

SIX TOOLS TO A SUCCESSFUL CAMPAIGN

1. Understand your role.

Before you embark on your new experience as Campaign Leader for your agency or higher education institution, you need to be informed about the Combined Fund Drive and your role as a volunteer. Our program has plenty of ways for you to become educated.

- Explore our website www.cfd.wa.gov
- Utilize the CFD staff as a resource for running your campaign
- Attend Campaign Leader trainings, kickoff events and charity fairs
- Network with other volunteers, Campaign Leaders and county committees

2. Obtain leadership support.

Getting the support of your executive leadership and unit management is key to running a successful campaign. Leadership involvement can range from appearances at fundraising events to simple emails of support from upper management. Getting management involved has never been easier.

- Meet with your director/management and ask them to engage in the campaign by:
 - Signing letters
 - Sending emails
 - Participating in your kick-off event
 - Thanking employees for considering giving to the CFD
 - Including the CFD as an agenda item at executive management meetings
- Keep your director/management informed
 - Report campaign progress
 - Add events to his or her office calendar
 - Provide materials and information to him or her for promoting the campaign in your department

3. Build your team.

Local Coordinators are employees in your agency/institution who will be there to support you with the campaign. Consider these tips when selecting Local Coordinators.

- Recruit employees who represent all divisions in your workplace
- Give everyone a role like marketing, event planning, solicitations, etc.
- Try to select one Local Coordinator for each office or one coordinator for every 50 employees
- Make sure your Local Coordinators understand that the CFD is a part of state business and how it works
- Recruit other enthusiastic, excited, passionate people from all areas of your division, of different job classifications to help you with crafting a campaign suitable for your work environment
- Promote the benefits of being a Local Coordinator
 - It looks great on your resume
 - Helping others in your community helps everyone
 - New skills are developed in planning, organization, oral presentations and written communications
 - Employees get an opportunity to work with others in their agency, as well as other agencies and higher education institutions, and get to know them better

SIX TOOLS TO A SUCCESSFUL CAMPAIGN

4. Create a campaign plan.

Before you begin an event or campaign, you need to develop a plan. Larger agencies begin planning as early as the summer with a group of volunteers who make up a campaign committee. For other agencies, it's as simple as figuring out which events you'd like to hold and how to administer your marketing strategies throughout your campaign.

- CFD Campaign dates are October 1-December 13, 2013
- Review past campaigns to identify strengths and areas for improvement
- Establish a timeline and delegate specific responsibilities to team members with due dates
- Work with your management team and volunteers to establish clear, measurable goals
- Include a communication strategy, schedule events ahead of time and identify when to send emails
- Ask to be included on agendas for meetings
- Initiate strategies for the "Last Week to Give"

5. Promote your campaign.

Everyone has a cause they believe in. For many people, they simply need to be given an opportunity to help their community. Asking potential donors to become part of the Combined Fund Drive can be a fun and unique experience that requires a deep knowledge of your agency/institution's culture.

- Be enthusiastic and excited
- Schedule charity speakers during the campaign
- Work with your fellow volunteers to promote the CFD in all departments
- Let your co-workers know what their donations are doing for the community
- Use your resources like publications, the CFD website, charity guides, newsletters, and emails
- Share personal stories about why you and others (volunteers, donors, etc.) give to your specified charity
- Make the Ask: explain the CFD, the impact on your community and ask others to consider participating

6. Recognize and say "thank you."

Our surveys indicate 50 percent of Local Coordinators don't "want" or "need" recognition for their hard work. However, it sure is nice to be recognized for a job well done.

- Recognize your team at a staff meeting
- Give your volunteers personalized certificates
- Plan a post-campaign recognition meeting or event
- Personally write thank-you cards to each of your volunteers
- Thank your Local Coordinators in your workplace newsletter
- Display the final results for your campaign and nominations or awards your team receives
- Work with leadership to send a letter of appreciation for everyone who participated in the CFD

CFD STAFF

Who does what?

SPECIAL PROGRAMS DIRECTOR

Stephanie Horn

Stephanie Horn



Stephanie is in charge of the Special Programs Division within the Office of the Secretary of State. This division houses the Address Confidentiality Program (ACP), the Productivity Board and the Combined Fund Drive (CFD).

Contact Stephanie if you need:

- 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) 704-5258

CFD PROGRAM MANAGER

Philip Kerrigan

Philip Kerrigan



Philip assists the Special Programs Director in running the CFD. The position also backs up CFD personnel and establishes connections with community charities.

Contact Philip if you need:

- 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) 704-7145

RESOURCE COORDINATOR

Dawn Sanquist

Dawn Sanquist



Dawn is the CFD's unofficial firefighter. She tackles questions and concerns from donors, charities and volunteers, and addresses system questions for all participants. 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) 704-7143

PROGRAM SPECIALIST

Heather Lucas

Heather Lucas



Heather works with the OSOS finance department and IT staff on crucial issues such as charity disbursements, donations and back-end system problems. She also assists with marketing, like videos and printed materials.

Contact Heather if you need:

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

heather.lucas@sos.wa.gov

(360) 704-7144

ADMINISTRATIVE COSTS

What are administrative costs? Administrative costs are the building blocks of doing business for charities. Each year, charities are asked to submit FORM 990 to the Internal Revenue Service. This document is a report of their functional expenses for the year.

There are two different administrative costs incurred by charities in the Combined Fund Drive.

Administrative Fees

Everyday expenses like rent and utilities, bookkeeping, annual audits, payroll, benefits, staff training and supplies needed in order to operate the CFD.

Fundraising Fees

The cost of raising funds through community awareness events such as charity fairs, direct mailing campaigns, event planning and coordination.

The two fees are combined to form the percentage that charities advertise on our website and in our charity guides as their administrative costs.

Combined Fund Drive Administrative Costs

The CFD is allowed by state law to deduct reasonable administrative costs from the campaign contributions to run the campaign (WAC 375-55). Administrative costs pay for volunteer coordinating, training and recognition, payroll, office expenses, printing of campaign materials, development of the CFD video, postage, and contracted professional support.

CFD Financial Breakdown

For the calendar year of 2012

Total specified donations received	\$4,619,578.17
Total CFD non-specified donations received	\$381,379.29
Total interest from CFD non-specified account	\$4,268.55
Total administrative costs	\$735,073.14
Total corporate donations from CFD partners	\$22,541.12

Total Administrative Percentage for CFD in 2012 **14.62%**

ETHICS BOARD OPINION

Executive Ethics Board - ADVISORY OPINION 00-09

Use of State Resources/Combined Fund Drive

References: RCW 42.52.160. Use of persons, money, or property for private gain.

ISSUE

Does the use of state resources such as employee time, equipment and supplies for the Combined Fund Drive violate RCW 42.52.160(1)?

OPINION

The answer is no. RCW 42.52.160(1) does not apply to the conduct of state business. The Combined Fund Drive is part of the business of the state, so RCW 42.52.160(1) does not apply. However, the amount of state resources that may be devoted to the drive is a matter left to the discretion of each agency.

ANALYSIS

This opinion concerns the Combined Fund Drive. RCW 41.04.036 authorizes voluntary deductions from the pay of state officers and employees for charity. In 1984, Governor Spellman issued Executive Order 84-13. The Order noted that there were a number of charitable fund raising drives directed at state employees. The Order sought to solve this problem by setting up one annual fund raising drive.

To implement the Executive Order, in 1985 the Governor's Office adopted rules establishing the State Employee Combined Charitable Contribution Program, WAC 240-10. WAC 240-10-010(2) established the Washington State Employee Combined Fund Drive Committee. The purpose of the program was to:

- (a) Lessen the burdens of government and of local communities in meeting the needs of human health and welfare;
- (b) Provide a convenient channel through which state employees may contribute to the efforts of the qualifying voluntary health and welfare organizations providing services in the community or region where the employees live and work and overseas;
- (c) Minimize both the disruption of the state work place and the costs to taxpayers that multiple charitable fund drives have caused; and
- (d) Ensure that recipient agencies are fiscally responsible in the uses of the moneys so raised.

WAC 240-10-020(2).

The rules establish the composition of the committee. WAC 240-10-010(3). The Department of Personnel provides the administrative support for the operation of the committee. WAC 240-10-010(11). At present, the committee has three full-time staff members. The rules set up criteria a charitable organization must meet before being allowed to participate in the Combined Fund Drive. WAC 240-10-040-050. The Committee is responsible for determining eligibility. WAC 240-10-055. At present, approximately 1600 charities participate in the drive.

The fund drive operates through each state agency. The committee seeks to appoint a fund coordinator in each agency. In some large agencies two employees may share the coordinator's job. The committee also tries to have a coordinator in each local office. The amount of time an agency or local coordinator spends on the Combined Fund Drive depends on agency management. Some are supportive and the coordinator may devote a lot of time to the drive. In other agencies very little is done.

The question is whether the use of agency personnel and resources for the Combined Fund Drive violates RCW 42.52.160, which provides, in part:

- (1) No state officer or state employee may employ or use any person, money, or property under the officer's or employee's official control or direction, or in his or her official custody, for the private benefit or gain of the officer, employee, or another.
- (2) This section does not prohibit the use of public resources to benefit others as part of a state officer's or state employee's official duties. (Emphasis added.)

The answer is no. The combined fund drive is conducted pursuant to RCW 41.04.036 and WAC 240-10. The purpose of the drive is not only to raise money for charity. It is also designed to reduce the disruption to government that formerly existed when there were a number of fund drives. RCW 42.52.160(2) provides that the limits on using state resources in RCW 42.52.160(1) do not apply when the use of resources is part of a state officer's or employee's official duties. The Combined Fund Drive is part of the official duties of any officer or employee assigned to run the drive in his or her agency.

Although participation in the Combined Fund Drive is part of an officer's or employee's duties, the time devoted to this task must be compatible with the officer's or employee's other duties. Thus, agency management is responsible for determining how much time can be devoted to this task.

CONFLICT OF INTEREST POLICY

June 1, 2012

MEMORANDUM OF POLICY

RE: Combined Fund Drive policy on conflicts of interest

This conflict of interest policy is designed to help directors, officers and employees of the Combined Fund Drive (CFD) identify situations that present potential conflicts of interest. It will provide the CFD with a procedure, if observed, that will allow a transaction to be treated as valid and binding even though a director, officer, volunteer or employee has or may have a conflict of interest with respect to the transaction.

Avoidance of conflict of interest

Any employee of the Combined Fund Drive, member of the CFD Advisory Council or county committee, because of membership on the council or committee or other affiliation with a charitable organization, could be or appear to be in conflict of interest under any statute, regulation, Executive order, or applicable agency standards of conduct. Under no circumstances may a CFD employee, volunteer or Advisory Council member affiliated with an organization for inclusion on the local list, participate in the eligibility determinations of other charities, donors or volunteers.

Prohibited discrimination

Discrimination for or against any individual or group on account of race, color, religion, sex, national origin, age, handicap, or political affiliation is prohibited in all aspects of the management and the execution of the CFD. Nothing herein denies eligibility to any organization, which is otherwise eligible under this part to participate in the CFD, merely because such organization is organized by, on behalf of, or to serve persons of a particular race, color, religion, sex, national origin, age, political ideology, or handicap.

DISCONTINUING CONTACT

June 1, 2012

MEMORANDUM OF POLICY

RE: Combined Fund Drive Policy on discontinuing contact upon request

1. Policy: It is the policy of the Washington State Combined Fund Drive (CFD) to discontinue contacting any person upon that person's oral or written request directed to the organization, its professional fundraiser, or other agent.

The CFD shall maintain a record of all requests by persons who indicate to the CFD, its professional fundraiser, and other agents, that they do not wish to be contacted by or on behalf of the Combined Fund Drive.

2. Limitation: This policy does not prohibit contact by the CFD that is solicited by a person or a person's representative, even if the person or his/her representative has requested to be placed on the "anonymous individual list." Contact by the CFD that is solicited by a person whose name appears on "anonymous individual" list shall be limited to providing a direct response to the person's inquiry and shall not cause the person's name to be removed from the "anonymous individual" list.

3. Procedure: Upon a person's (or a person's authorized representative's) request that the CFD discontinue further contacts, the person's name and address will be promptly modified to insure that no further contact is made with the person. The CFD will also take steps to insure that the person's name is removed from any external databases or records under the CFD's control.

4. Permanent Record: the CFD will maintain a record of all requests for discontinuance of contacts, effective with the adoption of this policy by the CFD's board of directors. Oral requests will be recorded in writing by the staff of the CFD. Such a request will be maintained by the CFD to the extent necessary for legal or liability purposes.

DONOR PRIVACY POLICY

MEMORANDUM OF POLICY

RE: Donor Privacy Policy for the Combined Fund Drive

This statement discloses the privacy practices for the Washington State Combined Fund Drive (CFD).

The CFD is committed to maintaining donor confidence through a strict privacy policy. This statement explains what identifiable information we collect, how it's used and shared, what choices you have in disclosing your information, its security, and how you can correct inaccuracies.

DONOR BILL OF RIGHTS

The Combined Fund Drive firmly believes in the Donor Bill of Rights.

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the equality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

1. To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
2. To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
3. To have access to the organization's most recent financial statements.
4. To be assured their gifts will be used for the purposes for which they were given.
5. To receive appropriate acknowledgement and recognition.
6. To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.
7. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
8. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
9. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
10. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

The text of this statement in its entirety was developed by the Association of Fundraising Professionals (AFP), Association for Healthcare Philanthropy (AHP), Council for Advancement and Support of Education (CASE), and the Giving Institute: Leading Consultants to Non-Profits.

WHAT INFORMATION WE COLLECT

In order to process donations and payments by donors to the charities of their choice, the CFD must collect certain personal information. This information may include name, type of pledge, amount donated, personal address, telephone number, email address, workplace profile information and any other personal information provided to us ("donor data"). This information is housed in a secure area of the website (a "donor profile"). For donations by check, Donor Data includes the data visible on the check, and is applied to a donor profile with the same donor data.

HOW WE USE THIS INFORMATION

Donor data may be used for the following purposes:

- Distributing receipts and thanking donors for donations (by the CFD or a third party non-profit)
- Informing donors about upcoming fundraising and other activities at the CFD
- Informing and updating donors of changes their chosen charities make, like closures
- Record keeping
- Reporting to applicable government agencies as required by law

WHO CAN SEE THIS DATA?

Donor data can only be seen by a staff member of the donor's agency payroll office, a Campaign Leader at your specific agency, members of the CFD staff and the third party charity that is receiving your donation. Donor data cannot be shared with agency management, Local Coordinators at your agencies, or third-party charities that have not received a pledge from a donor.

OPTION TO REMAIN ANONYMOUS TO OUTSIDE CHARITIES

Our system is equipped with the ability for a donor to choose the option to remain anonymous to outside entities. If a donor chooses to remain anonymous, there will be no opportunity for a third party to view any of their donor data. A donor can select this option at any time.

If a donor chooses to remain anonymous, their data can still be viewed by Combined Fund Drive personnel and the donor's agency payroll office. In such cases, it is the internal policy of the CFD that personnel are not to share this information with any outside third party.

CHANGES TO PERSONAL INFORMATION

Donors are allowed to make changes to much of their own data, including contact name, email address, physical address, phone number and password information. Payroll information that is collected from the Department of Enterprise Services is completely secure and cannot be changed by CFD personnel, volunteers or charities.

COOKIES

A cookie is a piece of data stored on the user's hard drive containing information about the user. We use cookies to store your login information on your computer. You can access much of our website without cookies, but there are some areas such as your Donor Profile page that require cookies. However, we do not use cookies to track your browsing history or match it with your identity for any purpose.

SECURITY

This website takes every precaution to protect our users' information. Donor Profile entry uses SSL encryption, and our database uses hashed passwords that no party associated with the Combined Fund Drive can view. The database is not exposed to any outside parties.

LINKS

Our website contains links to other sites. Please be aware that the CFD is not responsible for the privacy practices of other sites. We encourage our users to be aware when they leave our site and to read the privacy statements of each and every website that collects personal information.

CHILDREN'S ONLINE PRIVACY PROTECTION

The Combined Fund Drive strictly abides by the provision written in the Children's Online Privacy Act of 1998 (Sec. 1301-1308). Guidelines of this law can be viewed at <http://www.ftc.gov/ogc/coppa1.htm>.

APPLICATION OF THIS PRIVACY STATEMENT

This privacy statement applies solely to information collected by our website, www.cfd.wa.gov.

CONTACT US

For further questions regarding our privacy policy, you can reach the state CFD office at:

Washington State Combined Fund Drive
6880 Capitol Boulevard SE
PO Box 40250
Olympia, WA 98504-0250

PHONE: (360) 704-7143
EMAIL: cfid@sos.wa.gov

NOTIFICATION OF CHANGES

If the Combined Fund Drive decides to change its privacy policy, those changes will be posted to the website so all users are aware of what information is being collected, how it is used and if it is disclosed.



FUNDRAISING CASH HANDLING POLICY

General Guidelines

Money must be deposited into the bank within one day of receipt. Until it is deposited, staff who handle cash must safeguard the funds.

- Keep cash and checks in a locked and secured location
- Count and record cash and checks with one other person, then initial and date the record
- Transmit cash, checks and their corresponding records to your fiscal office daily
- When counting and recording cash and checks, list checks, cash and credit card totals in their own category, then add all three together for a grand total

Contact your fiscal office directly if you have questions about how to transmit funds to them.

CFD Reimbursement Process

State agencies may pay for CFD fundraising expenses out of their state budget and request reimbursement from the CFD state office. The OSOS will reimburse agencies for CFD fundraising expenses. Fundraising expenses must not exceed fundraising receipts for each fundraising event. Please contact the CFD state office for questions about reimbursement limits.

To request a reimbursement for fundraising expenses, send receipts, the materials purchased and a brief explanation of the purchased materials' purpose to your fiscal office. Indicate that you are requesting a reimbursement. Your fiscal office will submit the reimbursement request to the CFD state office.

CFD Petty Cash Accounts and Change Accounts

Depending on the need, the CFD may fund CFD petty cash or change accounts within state agencies or institutions. CFD petty cash accounts may only be used for CFD fundraising costs. You need to contact and work with your fiscal office if you think you would like to establish a petty cash or change account for CFD purposes. Your fiscal office will complete the necessary process with the CFD state office if a petty cash or change account is approved.

Never make financial decisions for CFD funds or accounts without involving your fiscal office.

Chapter 434-750 WAC

COMBINED FUND DRIVE

NEW SECTION

WAC 434-750-010 Purpose. The combined fund drive is the only authorized formal solicitation of Washington state employees in the workplace on behalf of participating not-for-profit organization and federations.

NEW SECTION

WAC 434-750-020 Intent. The intent of the combined fund drive is to:

- (1) Lessen the burdens of government and of local communities in meeting the needs of human health and welfare;
- (2) Provide a convenient channel through which state employees and public agency retirees may contribute to the efforts of the participating organizations and federations providing services in Washington state and around the world;
- (3) Minimize both the disruption of the state workplace and the costs to taxpayers caused by multiple charitable fund drives; and
- (4) Ensure that participating organizations and federations are fiscally responsible in the uses of the moneys so raised.

NEW SECTION

WAC 434-750-030 Exemptions. The rules in this chapter do not apply to the collection of gifts-in-kind, such as food, clothing and toys.

NEW SECTION

WAC 434-750-040 Definitions. The following definitions apply to chapter 434-750 WAC:

"CFD" means Washington state combined fund drive.

"CFD campaign" means the period of organized solicitation of state employees and public agency retirees. This solicitation is conducted to obtain voluntary contributions, donations and charitable commitments to be allocated to approved, not-for-profit participating organizations and federations. State agencies or institutions of higher education have the flexibility to conduct a CFD campaign once a year at any time during the year.

"Federation" means a public or private not-for-profit umbrella organization made up of five or more individual member organizations approved by the CFD committee to participate in the CFD campaign.

"Participating organization" means a public 170(c)(1) or private 501(c)(3) not-for-profit organization whose application is approved by the CFD to participate in the CFD campaign.

"State employer" means Washington state agencies and higher education institutions and related boards.

"Year of contributions" means the annual calendar year for collection of the voluntary payroll deductions for charitable contributions authorized by state employees and public agency retirees pursuant to these rules. The normal, full annual calendar year of contributions will begin with January and end with the ensuing December.

NEW SECTION

WAC 434-750-050 Handling and depositing contributions. The office of the secretary of state will establish a procedure for CFD staff to collect, process and deposit individual employee contributions. Contributions from fund-raising efforts will be deposited into the CFD account in the custody of the state treasurer according to state laws.

NEW SECTION

WAC 434-750-060 Staff and volunteer positions. The office of the secretary of state will establish staff and volunteer positions and committees as necessary to assist in the annual CFD campaign.

NEW SECTION

WAC 434-750-070 Responsibilities of CFD program manager. The CFD program manager exercises general supervision over all operations of the CFD and strives to take necessary steps for the achievement of CFD campaign objectives. The CFD program manager establishes and maintains the official list of agency, higher education institutions and local CFD campaign committee volunteers and the geographical area each covers.

NEW SECTION

WAC 434-750-090 Contracts. The CFD may enter into contracts and partnerships with a private institution, persons, firms or corporations for the benefit of the beneficiaries of the CFD. The CFD may also engage in advertising activities for the support of the administrative duties of the CFD. However, CFD activities will not result in the direct commercial solicitation of state employees or in a benefit or advantage that would violate one or more provisions of chapter 42.52 RCW, the state ethics law.

NEW SECTION

WAC 434-750-100 Campaign executives. Agency directors, elected officials and higher education presidents are authorized and encouraged to designate employees the opportunity to serve as CFD campaign executives to assist in the conduct of the CFD campaign. The CFD campaign executive opportunity is a rotational assignment that develops leadership, communication, and teamwork skills that will benefit the employing organization upon the employee's return. Those appointed as CFD campaign executives remain on the payroll of their employing organization during this assignment.

NEW SECTION

WAC 434-750-110 CFD campaign support. State agencies and higher education institutions, at their discretion, are authorized to use reasonable state resources to support, promote, and conduct the annual combined fund drive campaign within their organization.

Reasonable uses are not excessive in volume or frequency as determined by the agency director or institution president.

NEW SECTION

WAC 434-750-120 Local CFD campaigns. Each state employer may establish local CFD campaigns within the geographical area it covers. Each state employer and local county committee may develop promotional and fund-raising events, provide training and recognition to CFD local coordinators, develop marketing plans, supervise CFD campaign executives, and expend state or CFD funds to conduct the local CFD campaign.

NEW SECTION

WAC 434-750-130 CFD campaign occurrence. Each year the director of each state agency and president of each higher education institution may determine the time period of the agency's or institution's CFD campaign. Each annual CFD campaign normally is conducted for a seven-week period. However, in unusual circumstances, the individual state employers may extend the seven-week period as local conditions require.

NEW SECTION

WAC 434-750-140 Permission to share information during work hours. The local state employer may grant sharing of information during the CFD campaign, by participating organizations if the agency or institution determines such communication is not disruptive to the local state office or institution. All CFD participating organizations must be given an equal opportunity for communication in a state employer's local CFD campaign.

This section will not be construed to require a state employer to distribute or arrange for oral or written information other than the official CFD campaign and publicity material.

NEW SECTION

WAC 434-750-150 Campaign events during work hours.

Solicitations of employees will be conducted during work hours using methods that permit true voluntary giving. Solicitations will reserve to the individual the option of disclosing any gift or keeping it confidential to the extent confidentiality is permitted by law. Campaign kick-offs, recognition events, awards and other nonsolicitation events to build support for the CFD are encouraged. CFD fund-raising events, such as raffles (as permitted by RCW 9.46.0209 and 42.52.805), drawings, auctions, bake sales, carnivals, athletic events, or other activities not specifically provided for in these rules are permitted when approved, in advance, by the state employer. At the discretion of each state employer, state employees may be authorized to attend CFD promotional and fund-raising events on state work time.

NEW SECTION

WAC 434-750-160 Solicitation. Employees and public agency retirees may be solicited for contributions using payroll deduction, checks, money orders, credit cards, cash or electronic methods.

NEW SECTION

WAC 434-750-170 Recovery of campaign expenses. The CFD will recover from the gross receipts of the CFD campaign, or state appropriations, its reasonable administrative expenses to conduct the CFD campaign. The secretary of state will approve an annual budget to determine the administrative fee to be charged to the beneficiaries of the CFD.

NEW SECTION

WAC 434-750-180 Deduction of fund-raising expenses. Fund-raising expenses will not be taken or deducted from donations collected during a fund-raising event. These fund-raising expenses may be paid by the state agency or higher education institution and, then, upon request and submission of proper documentation,

reimbursed by the CFD.

NEW SECTION

WAC 434-750-190 Division of campaign expenses. The CFD campaign expenses will be shared proportionately by all the participating not-for-profit organizations and federations reflecting their individual percentage share of gross CFD campaign receipts.

NEW SECTION

WAC 434-750-200 Eligibility. Not-for-profit organizations must meet three requirements in order to be a member with the CFD:

- (1) Must have an approved federal IRS 501(c)(3) or 170(c)(1) status;
- (2) Must submit a CFD membership application; and
- (3) Must be registered with the Washington state office of the secretary of state. Registrations must be kept in an active status.

NEW SECTION

WAC 434-750-210 Organizations not eligible. If a not-for-profit organization or federation is determined not to be eligible, the CFD will provide written notice of its determination, including a description of the determination made, the date and by whom it was made, the basis for the determination, and the procedure for requesting reconsideration.

NEW SECTION

WAC 434-750-220 Reconsideration of noneligibility. The following process will be used for requests for reconsideration of noneligibility:

- (1) Within fifteen calendar days after receiving notice of

noneligibility, an affected organization or federation may submit a written request for reconsideration to the CFD. Requests for reconsideration and any supporting materials must be based solely on new or additional information that was not available to the CFD at the time the initial determination was made.

(2) Within thirty calendar days of receiving the request for reconsideration, the CFD will issue a written decision. The CFD reconsideration decision is final.

(3) The CFD may extend the time periods established in this section if it determines there is good cause to do so.

(4) Any written requests or notices made under this section will be deemed received three business days after deposited in the United States mail, properly stamped and addressed.

NEW SECTION

WAC 434-750-230 Decertification or disqualification. Once approved for participation, any participating organization or federation may be decertified and disqualified from participation in the combined fund drive campaign by the CFD for one or more of the following reasons:

(1) Failing to comply with the rules contained in this chapter;

(2) Filing an application to participate in the state combined fund drive campaign which contains false or intentionally misleading information; or

(3) Receiving less than two hundred dollars in total CFD contributions in a calendar year.

NEW SECTION

WAC 434-750-240 Notice of decertification decisions. The CFD will provide written notice of the decertification decision, including a description of the determination made, the date and by whom it was made, the basis for the determination, and the procedure for requesting reconsideration.

NEW SECTION

WAC 434-750-250 Decertification effective date.

Decertification is effective on the first day of the quarter following notice of decertification under WAC 434-750-240. Quarters begin on the first day of January, April, July, or October of each year. A decertified organization or federation is disqualified from participating in the CFD campaign as of that effective date.

NEW SECTION

WAC 434-750-270 Reconsideration of decertification decisions.

Requests for reconsideration of a decertification decision will be governed by the procedures set forth for reconsideration of eligibility in WAC 434-750-220.

NEW SECTION

WAC 434-750-290 Decertified contributions. The CFD will direct payments originally pledged to an organization or federation that has been decertified, is in receivership, has filed for or been placed in bankruptcy, or has been or is in the process of being dissolved, be returned to donors. If the CFD determines it is not feasible to return such funds to donors, it will determine the appropriate disposition of the funds.

NEW SECTION

WAC 434-750-300 Combined fund drive advisory council. The secretary of state may create a CFD advisory council to provide advice and guidance on matters pertaining to operating the CFD. The council will consist of no more than ten members chosen by the secretary of state to represent a broad variety of charities, higher education institutions, and state agencies.

Members serve at the pleasure of the secretary. Terms are staggered, with the original board drawing for two- and three-year terms. All following terms are three years but all terms expire no later than when the appointing secretary leaves office. Vacancies may be filled by the secretary upon notice of a vacancy from the

member. The council will elect a chairperson from its members annually. The frequency of meetings will be at least once a year but additional meetings may be called by the secretary or council. Council members are not compensated for their service, but may be reimbursed for expenses incurred in the conduct of their official duties. Reimbursement is at current state rates for travel and all reimbursement requests must be received within thirty days of incurring the expense.

CFD GLOSSARY OF TERMS

501(c)3 – One of the two tax exemption numbers that the Combined Fund Drive will accept from charities. This is a number received from the IRS when a charity files its paperwork. A 501(c)3 organization is operated by private interests and is considered a charitable organization by the IRS.

Administrative Costs – The costs of doing business for the CFD and all other charitable organizations. These costs include rent, employee salaries, travel and lodging, and marketing and fundraising costs. In order for a charity to be approved at the federal level, it must disclose its administrative costs.

Agency Code – The three-digit code given to an agency or higher education institution participating in the Combined Fund Drive.

Advisory Council – A group of 10 individuals that meets on a quarterly basis to advise the Combined Fund Drive staff on policies with the intention of improving program operations. The group is currently supported through CFD WAC codes (WAC #434-750) and is chaired by the Secretary of State. The council is comprised of three CFD volunteers, three charity/federation employees and three private sector employees with fundraising experience.

Agency Fundraising Event – An event held at any agency, higher education institution or county gathering that promotes awareness and donations toward the Combined Fund Drive. Most fundraising events go to the CFD Non-Specified Fund, which is dispersed to all charities receiving payroll contributions in the program. The volunteer running the event is allowed to choose his or her agency fundraising event.

Campaign Leaders – The volunteer who runs the annual CFD campaign for his or her agency. Each agency or higher education institution is equipped with one Campaign Leader. This Campaign Leader administers the campaign, chooses volunteers, orders supplies and logs fundraising dollars.

CFD Brochures – A marketing brochure that highlights what the Combined Fund Drive does for the community.

CFD Campaign – The annual campaign that promotes giving to charity through agency fundraising events and payroll contributions. Each agency runs its own campaign with the assistance of the state CFD office. Materials are sent out prior to the campaign and promotions are run from September through December each year.

CFD Campaign Poster – The poster used during the annual campaign.

CFD Campaign Video – A video produced each year highlighting the work of the charitable programs within the CFD. The Governor or the Secretary of State typically makes a statement in this video.

CFD Charity Guide – An annual directory of charities housed in the CFD system.

Change Account – An account that never decreases or increases and is only used to make change; not used to pay for purchases or expenditures of any kind.

Charity Code – The seven-digit code given to charities that are participating in the Combined Fund Drive. A charity receives this number after finishing the initial part of its application.

Contribution Form – A paper form an employee fills out dictating his or donations. The paper contribution form can be used at fundraising events, during silent auctions, or for general use if an employee does not have access to a computer.

County Committees – A group of volunteers that comes together on a monthly basis to plan county events for the Combined Fund Drive. These committees are housed in the counties with the highest percentage of state employees (Thurston, King, Pierce and Whatcom) and are not tied to one specific agency. They do not oversee the daily functions of agency campaigns. They are made up of agency volunteers and charity employees. Significant events planned by county committees include charity fairs, the Thurston County CFD Motorcycle Ride and training presentations.

Credit Card Donation Tool – A tool used for fundraising events that processes credit card payments. This tool is available upon request only and tracks donations through specific events. Campaign Leaders and Local Coordinators can request an event be added to the donation tool and Campaign Leaders are allowed to generate reports based on events or agency.

Disbursement – The period of the year in which the money collected from payroll contributions and agency fundraisers is sent to charities. This happens quarterly, with the bulk of fundraising dollars disbursed in the first quarter.

Donor – Any state, higher education employee or retiree who gives to the charity of his or her choice through the Combined Fund Drive.

Employee Identification Number – The employee-specific number that identifies each donor. This number is needed each time a donor signs into his or her account. Every employee receives an identification number when he or she is hired.
NOTE: The CFD system cannot accept running zeroes at the

beginning of an employee identification number, so employees are prompted to bypass those digits when entering in their number.

Ethics Board Opinion – The ruling by the Washington State Ethics Board that enables the Combined Fund Drive to solicit advertising dollars and in-kind donations from private businesses (Ethics Opinion 00-99).

Federal Tax Identification Number – This is the number assigned to a charity when it has applied and received tax exemption status from the Internal Revenue Service. This number is specific to the charity that applies for it, and cannot be used by another charity unless it is considered a program of a larger charity, at which point all finances (donations, salaries, etc.) go through the program charity. This number is used by charities to sign up for the CFD.

Federation – A large charity (United Way, Earthshare Washington, Global Impact, etc.) that houses smaller community charities under its umbrella to help with marketing and finance costs. These federations are very important for smaller charities that cannot afford to market themselves or pay for additional staff to handle donations. Charities can move in and out of federations on a yearly basis.

Higher Education Foundation – The nonprofit foundation at a higher education institution that oversees the scholarship funds and various programs within that institution. Nearly every single higher education institution is represented in the CFD, and their programs make up nearly 700 of the total nonprofits registered in the program.

Limited Time Contribution – One of the methods that employees can use to donate. Employees choose a specific length of time and the contributions are taken out of paychecks until the chosen end date.

Local Coordinators – Volunteers within agencies who assist Campaign Leaders in running the annual CFD campaign. These volunteers have significantly less administrative duties to attend to than their Campaign Leader counterparts. They are typically housed in individual departments amongst each agency, and help run fundraising events as well as payroll contribution campaigns.

Mission Statement – A short written statement of a charity or organization's goals and/or philosophies.

Monthly Contribution – One of the methods that employees can use to donate. This is the most common method. Deductions occur at each pay period.

One-Time Contribution – One of the methods that employees can use to donate. An employee can choose a single paycheck to deduct the contribution from and the funds are taken out at that time.

Petty Cash Account – An account used to make change or pay for purchases, which decreases over time and is replenished to bring it back to the original amount.

Program of a Larger Charity – A specific program (Scholarship funds, county Boy Scout troops, etc.) that is housed under a charity. This program uses the same financial information as its larger charity and cannot operate on its own.

Reconciliation – The method the CFD uses to verify donations collected and disbursed.

Recurring Limited Time Contribution – One of the methods that employees can use to donate. Employees choose a specific length of time and the contributions are taken out of paychecks until the chosen end date. These contributions will be recurring from year-to-year until the employee chooses to stop.

Speaker's Bureau – A webpage dedicated to connecting charity speakers with Local Coordinators and Campaign Leaders. The webpage address is <http://www.cfd.wa.gov/invite-a-speaker.aspx>.

WAC Codes – The general rules of the Combined Fund Drive (WAC #434-750) passed into law.

Washington Charitable Solicitations Number (aka Washington Registration Number) – The number specifically assigned to a charity that applies with the OSOS Charities Division. Any charity that chooses to do business in the state of Washington or receive donations through the Combined Fund Drive must apply for a solicitations number.

www.cfd.wa.gov – The Combined Fund Drive website. This site is home to the News & Events, Volunteer Resources, Campaign Leader profile link and donation homepage.

2013 Campaign Calendar

September 2013

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2 "I GIVE" Contest Begins	3	4	5	6	7
8	9	10	11	12	13	14 CFD/DSHS Golf Tournament
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

October 2013

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1 Start of 2013 CFD Campaign	2	3	4	5
6	7	8	9	10	11	12 "I GIVE" Contest Ends
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

November 2013

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

December 2013

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
8	9	10	11	12	13	14
<-----Last Week To Give----->						
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31 End of 2013 CFD Campaign				



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