

2017

WE ARE ALL HEROES TO SOMEONE



**FREE US
\$2.00 CAN**



#3

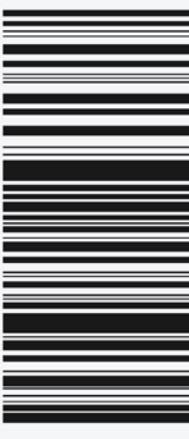
IN THE COUNTRY IN PUBLIC GIVING

CAMPAIGN LEADER TRAINING HANDBOOK



JORDAN AND THE TEAM FROM
BLOODWORKS NORTHWEST

WASHINGTON STATE COMBINED FUND DRIVE



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WE WILL TRAIN
YOU TO BECOME A
HERO
TO SOMEONE
LIKE JORDAN

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SOS
Office of the Secretary of State
Kim Wyman



A Message from Secretary of State Kim Wyman

Greetings,

On behalf of the Washington State Combined Fund Drive and all those in need, I thank you for volunteering for the 2017 Annual Giving Campaign. The CFD is an important part of our community, providing much-needed financial relief to local, national and global charities through payroll contribution and fundraising events.

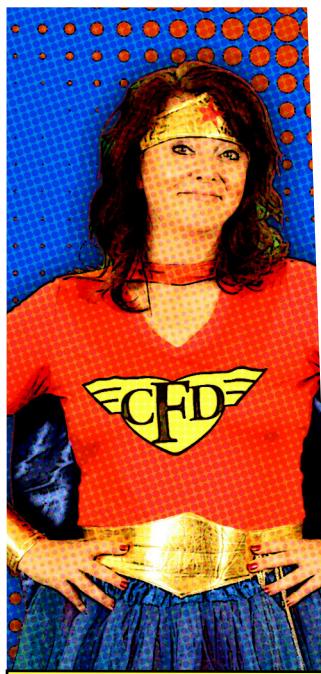
The CFD has become one of the most innovative and successful public employee giving campaigns in the country, raising more than \$5 million annually for the last 13 years and more than \$135 million since the program began in 1984.

This would not be possible without the support of volunteers like you.

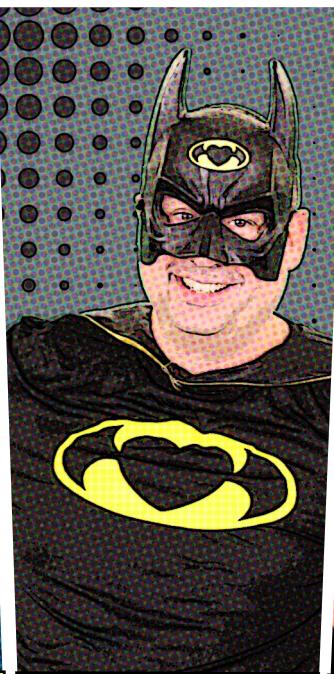
The impact of your work is felt throughout your community. Thanks again for all your efforts.

Sincerely,

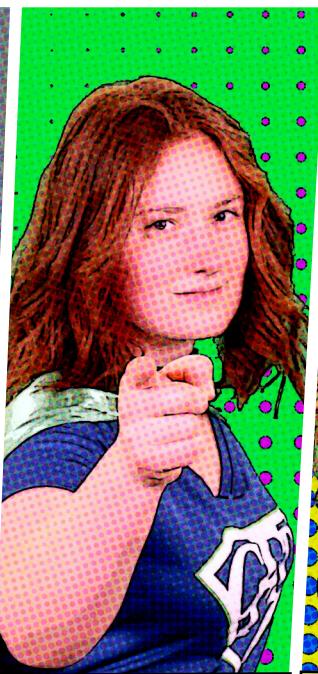
Kim Wyman
Kim Wyman
Secretary of State



STEPHANIE HORN
COMMUNITY PROGRAMS
DEPUTY DIRECTOR



PHILIP KERRIGAN
PROGRAM MANAGER



JERIKA FERGUSON
MARKETING
AND DEVELOPMENT



DAWN BAKER
RESOURCE
COORDINATOR



HEATHER LUCAS
FISCAL AND POLICY
COORDINATOR

Created in 1984, the Combined Fund Drive (CFD) was established to consolidate the numerous charitable fundraising campaigns being conducted on state work sites. The purpose of the Combined Fund Drive is 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 through charitable involvement.
- We strive for excellent customer service when interacting 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 all CFD stakeholders.
- We consistently improve our operations to increase accessibility and participation.



OUR DONORS



MORE THAN 15,000 DONORS GIVE
THROUGH THEIR PAYCHECKS EVERY YEAR

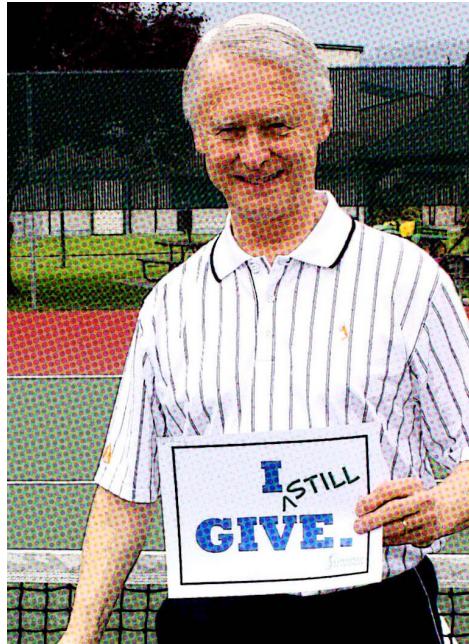
Washington State law allows three different kinds of donors to participate in the CFD through payroll contribution:



STATE EMPLOYEES



HIGHER EDUCATION EMPLOYEES



STATE RETIREES

WHO ELSE IS ELIGIBLE?

The following people are also allowed to use the CFD as one of their methods of giving:

- Port of Olympia employees
- Seattle Housing Authority employees
- Any private citizen paying cash, check or credit card at a CFD fundraising event

WAYS TO GIVE

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 three different methods:

- Monthly Contribution
- One-Time Contribution
- Limited-Time Contribution

FUNDRAISING EVENTS

Fundraising events 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 what charities they want their fundraising dollars to support. 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 AND MONEY ORDERS

A personal check may be written to the Combined Fund Drive during the campaign. The CFD cannot accept checks made payable to a specific charity. Each check must be accompanied by a paper contribution form highlighting the charity to whom it is being donated.

CREDIT CARDS

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



GIVE ONLINE...

Donors can manage their accounts online signing in at www.cfd.w.agov or start giving straight from the CFD search engine.

...OR ON PAPER

Donors can also give to charity by filling out a paper contribution form and specifying the charity of their choice. The form must be signed in order for the donation to be processed.



VOLUNTEER TRACKER

LAST YEAR ALONE, MORE THAN \$300,000 WAS SAVED FOR CHARITIES BY WASHINGTON STATE EMPLOYEES THROUGH VOLUNTEERING



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 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 that log the most hours.

SEARCH

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

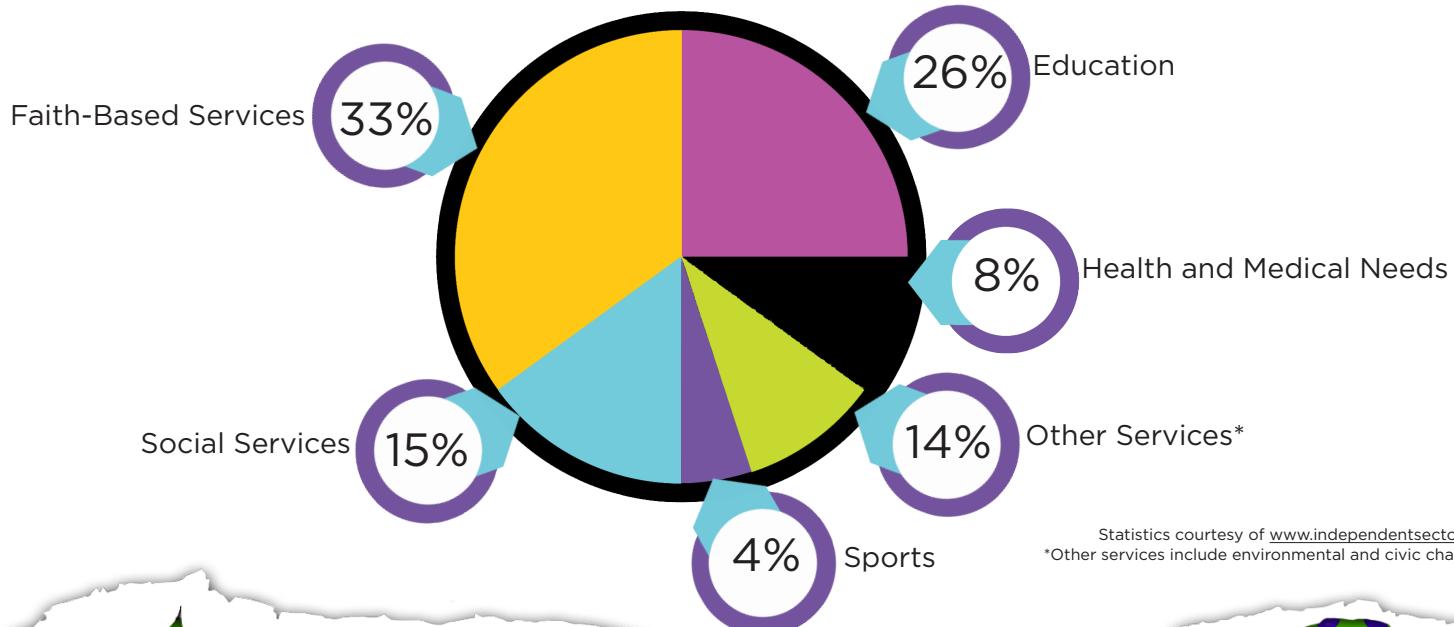
LOG

Donors can log volunteer hours with any CFD member charity through the search engine.

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:



OUR CHARITIES

MORE THAN 4,500 CHARITIES
CURRENTLY PARTICIPATE IN THE
COMBINED FUND DRIVE



The volunteers of the Combined Fund Drive work tirelessly to improve their communities through donations to charities throughout the world. For our member charities, requirements are simple:



Be registered
with the IRS as a
501(c)3 or 170(c)1

and
Be registered as a
charity with the
Washington State
Secretary of State



BENEFITS FOR CHARITIES

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

- It's FREE to join!
- CFD participation saves time and money, reduces administrative and development costs and provides more dollars to actual services.
- Payroll contribution continues to be one of the most cost-effective ways for charities to raise funds.
- Charities can plan out their fiscal years better because they can project donations in advance.
- For some charities, the CFD is their primary source of funding.
- Participating in the CFD can provide access to thousands of potential donors.

2016 Top Three Charities of the Combined Fund Drive

1



WASHINGTON STATE
**COMBINED
FUND DRIVE**

Combined Fund Drive
\$364,284

2

northwest
HARVEST



Northwest
Harvest
\$142,781

3



Thurston County
Food Bank
\$122,102

OUR VOLUNTEERS

THE COMBINED FUND DRIVE HAS MORE THAN 900 VOLUNTEERS STATEWIDE WHO HELP ADMINISTER THE PROGRAM

VOLUNTEER

The Combined Fund Drive would not be a successful program without the tireless efforts of its volunteers. The CFD has different volunteer roles and responsibilities for each of its volunteers:



EXECUTIVE SPONSORS

This is the leader chosen by the agency director to help provide key support to their volunteers.

Duties can include:

- Sending out emails of support
- Assisting in recruiting efforts
- Acting as a liaison with management
- Communicating with front line supervisors



CAMPAIN LEADERS

Acts as the lead volunteer for the entire agency, recruiting and providing support.

Duties can include:

- Recruiting volunteers
- Logging fundraisers
- Ordering supplies
- Building an agencywide theme



LOCAL COORDINATORS

These are the volunteers that run their campaigns within local offices.

Duties can include:

- Planning fun events
- Building local teams
- Promoting giving
- Report results to Campaign Leaders

YOUR ROLE

"WITH GREAT POWER COMES GREAT RESPONSIBILITY."
-SPIDERMAN'S UNCLE



LEAD.

As the lead volunteer in your entire agency, you are able to set the course for your entire campaign. Your efforts will bring thousands of dollars into our community.

- Work to craft a general agency campaign theme
- Communicate regularly with your Local Coordinators
- Communicate regularly with your agency management

ACT.

As the lead, you can conduct your agency campaign the way you choose. You can craft agencywide promotions like online auctions, or allow your local volunteers to create their own events. It's entirely up to you. Just make sure that you:

- Log ALL fundraisers for your agency at the end of the campaign (by December 8, 2017)
- Put together your own office events with your team
- Share your campaign results with your volunteers and donors

RECRUIT.

No giving campaign can be successful without a supportive and active team of volunteers. It's your role to recruit as many Local Coordinators as you need. You can lead the recruitment effort in your agency.

- Work with management to recruit volunteers in offices statewide
- Work with your Executive Leader to appoint volunteers if necessary
- Enter new volunteers and manage existing volunteers in the CFD database
- Build your local team for your own office events

MAKE YOUR CAMPAIGN A SUCCESS



SIX SIMPLE STEPS THAT WILL MAKE
YOUR CAMPAIGN A SUCCESS

WHAT?

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.

You can gain the knowledge you need to succeed when you:

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

COOL!

GET LEADERSHIP SUPPORT

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

Make sure your leadership is engaged by:

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

WOW!

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 and different job classifications, etc., to help you with the campaign
- Give everyone a role, like creating a website, marketing or event planning
- Set goals and share in your successes

MAKE YOUR CAMPAIGN A SUCCESS

SIX SIMPLE STEPS THAT WILL MAKE
YOUR CAMPAIGN A SUCCESS



POW!

YEAH!

BAM!

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.

Some tips to keep in mind when creating 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

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, like publications, the CFD website, charity guides, newsletters, games, and emails

RECOGNIZE AND THANK YOUR TEAM

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

Recognize the people who make your campaign a success:

- 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

OUR ETHICS

THE COMBINED FUND DRIVE IS ONE OF THE ONLY CHARITABLE ACTIVITIES THAT IS ALLOWED DURING STATE TIME



The CFD is a unique program that does not operate like many other state government entities. Because of this, questions can arise about the ethics involved with administering your campaign.

CAN I REALLY DO THIS ON STATE TIME?

Yes. According to Ethics Opinion 00-09, the CFD is considered business of the state. This opinion gives our registered volunteers the freedom to use state time and resources to conduct CFD campaign events.

Here are some of the things you can do:

- Use your office printer to print off flyers
- Take time during your day to schedule meetings about possible fundraisers
- Conduct fundraisers during work hours

CAN I SOLICIT OUTSIDE BUSINESSES FOR IN-KIND DONATIONS?

This is a trickier question. The WACs that govern our program all volunteers to solicit, but it is ultimately at the discretion of your agency. Many regulatory agencies do not allow their employees to solicit due to possible conflicts of interest.

If you are allowed to solicit for in-kind donations, make sure to do the following:

- Approach businesses during your off-time or lunch breaks
- Clearly identify the nonprofit organization for which you are raising money
- Do NOT identify yourself as a state employee
- Do NOT approach businesses you directly regulate or contract with

If your agency does not allow you to solicit, contact the CFD state office. Our staff is willing to assist you in your procurement.

TIMELINE

Annual Giving Campaign Schedule

The CFD annual campaign kicks off in October 2017, but there's a number of events and deadlines that happen throughout the year.

Important Dates to Remember

Campaign Leader Training	June 2017	Campaign Kickoff	October 2, 2017
CFD staff mails Campaign Materials	August 2017	Campaign Results Posted	Ongoing throughout campaign
Local Coordinator Training	August 2017	Submit Fundraisers	December 8, 2017

Campaign Planning Checklist

Task	Due Date	Complete
Recruit your volunteer team	July 31, 2017	
Design a campaign plan	July 31, 2017	
Obtain leadership support	July 31, 2017	
Add Local Coordinators to the CFD database	July 31, 2017	
Order supplies at www.cfd.wa.gov	August 2017	
Local Coordinators Training	August 2017	
Run your CFD campaign	October - December 2017	
Thank employees, volunteers and donors	November - December 2017	
Transfer fundraiser dollars to the OSOS finance office <small>If your fundraiser is not transferred to OSOS finance by December 8, 2017, there's no guarantee your fundraiser will be disbursed in January 2018. Fundraisers transferred after this date may be disbursed in April 2018.</small>	December 8, 2017	
Nominate volunteers for county and/or state awards	December 31, 2017	
Share your agency results and evaluate your campaign	January 2018	
If available, attend the recognition event in your area		

ADMINISTRATIVE COSTS



WHAT ARE ADMINISTRATIVE COSTS?

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 costs incurred by charities that are added together to make an organization's administrative costs:

OPERATIONAL COSTS

These are everyday expenses like rent and utilities, bookkeeping, annual audits, staff and benefits.

FUNDRAISING COSTS

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

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.



EXPENSES

Like any other nonprofit, the Combined Fund Drive has expenses that help administer the program on a statewide level. The program has two different classifications of expenses: operational and fundraising.

OPERATIONAL EXPENSES

The CFD has operational costs that are accrued throughout the year. These are the costs for 2016:

Employee Salaries	\$209,308.38
Employee Benefits	\$76,825.62
Purchased Services Contracts	\$324,172.22
To help administer the program statewide, the Combined Fund Drive entered into contractual agreements with three different organizations:	
<ul style="list-style-type: none"> • University of Washington • Department of Social and Health Services • Every Monday Matters 	
General Supplies	\$5,989.35
Communications	\$1,238.75
Rent and Utilities	\$4,827.35
Data Processing	\$8,858.97
Shipping & Postage	\$2,701.08
Employee Development & Training	\$1,262.48
IT Equipment & Software	\$293.75
Travel	\$10,566.45
Fiscal Services	\$36,000.00
The Office of Secretary of State supports the CFD by providing fiscal processing services throughout the year. This service is noted through a monthly fee.	
Other Goods & Services	\$574.26
Total Operational Expenses	\$682,618.66

FUNDRAISING EXPENSES

The CFD also incurs costs associated with marketing materials and fundraising events. These are the fundraising costs for 2016:

Printing & Reproduction	\$10,910.78
The Combined Fund Drive creates publications to assist volunteers in raising awareness. Some examples include:	
<ul style="list-style-type: none"> • Posters • General Campaign Rack Cards • Charity Guides • New Employee Rack Cards • Retiree Rack Cards • "I Give" campaign items (index cards, signs, etc.) 	
Marketing & Advertising	\$11,343.97
To raise awareness during the campaign, the CFD also purchases promotional items to give out at events and distribute to volunteers. Some examples include:	
<ul style="list-style-type: none"> • Balloons • "I Give" buttons • CFD pens • Wristbands 	
Fundraising Event Costs	\$15,138.93
The CFD conducts fundraising events throughout the year to help lower administrative costs. Some of these event include:	
<ul style="list-style-type: none"> • Football Kickoff Online Auction • 2016 Golf for Veterans Tournament • 2016 Masquerade Ball 	
Reimbursements to Agencies	\$16,319.68
Volunteers of the Combined Fund Drive are entitled to reimbursement through the reimbursement process. Some examples of costs for reimbursement include:	
<ul style="list-style-type: none"> • Chili Cookoff supplies • Purchases for softball tournaments • Silent auction purchases 	
These purchases are typically made during the campaign. Volunteers seek reimbursement from their respective agency. Many agencies wait until the end of the giving campaign to send in a reimbursement request to the CFD.	
Total Fundraising Expenses	\$53,713.36

Operational and fundraising expenses are tracked on a monthly basis and added together at the end of the year to acquire the total expenses of the Combined Fund Drive.

Total Operational Expenses	\$682,618.66
Total Fundraising Expenses	\$53,713.36

TOTAL EXPENSES

\$736,332.02

WASHINGTON STATE CFD FINANCIAL PICTURE

Specified Payroll Contributions and fundraising dollars are funds that have been specifically pledged and collected for CFD member charities.

Specified Payroll Contribution \$4,302,861.22

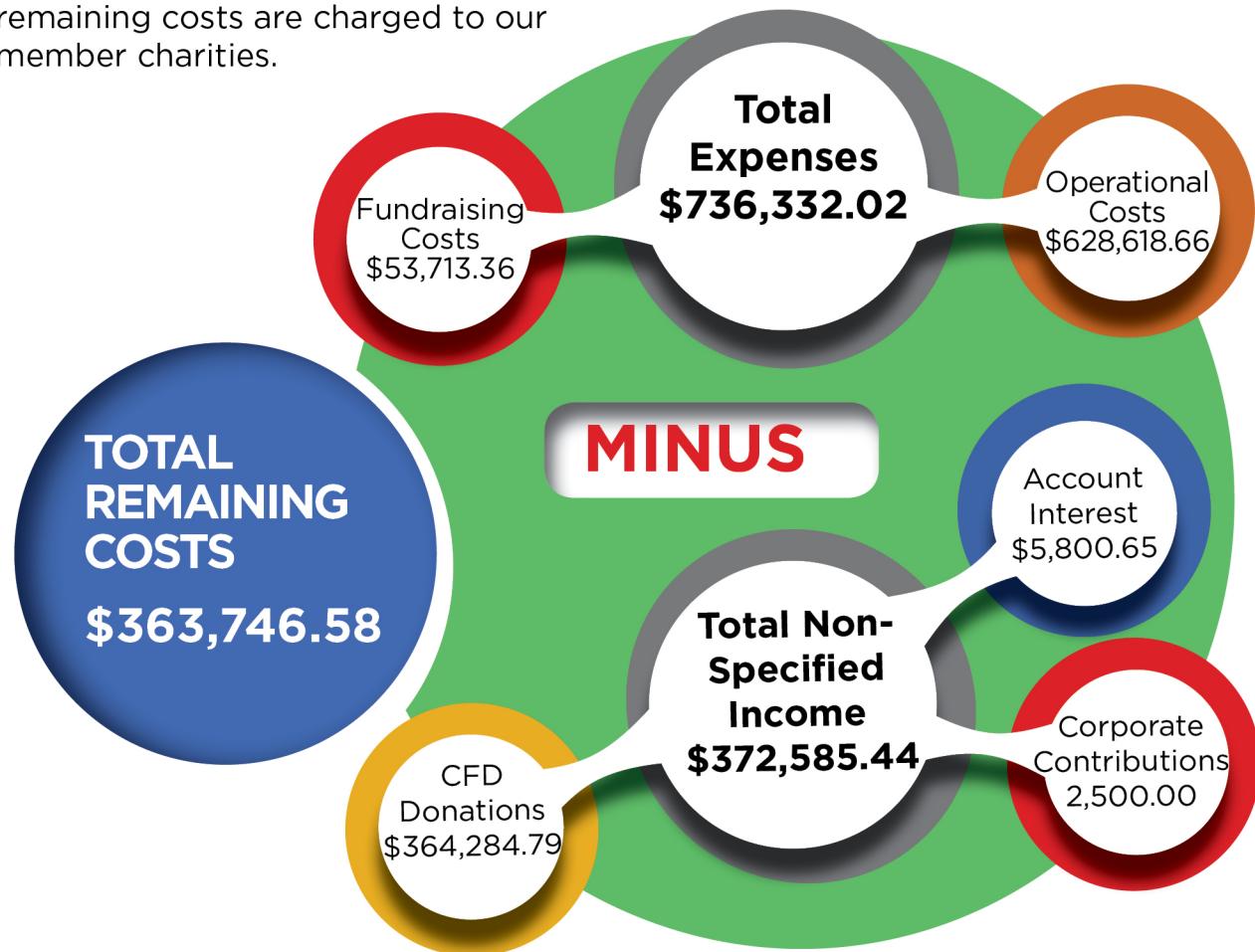
Specified Fundraising Dollars \$349,483.88

**TOTAL
SPECIFIED
INCOME**

\$4,652,345.10

KEEPING COSTS LOW

How does the CFD help keep its administrative costs low? The program and its volunteers raise money for its non-specified fund. All expenses are taken from this fund first. The total remaining costs are charged to our member charities.



AVERAGE PERCENTAGE
CHARGED TO CHARITIES

7.82%

Total Specified Income	\$4,652,345.10
MINUS	
Total Remaining Costs	\$363,746.58
EQUALS	
Total Disbursed to Charities	\$4,288,598.52

THE BOTTOM LINE

Why do we say AVERAGE charge to charity?

The Combined Fund Drive splits remaining costs amongst only the charities receiving funding from specified payroll contributions or fundraising dollars each quarter. The costs are administered on a percentage-of-the-whole basis. That means the more a charity receives in specified contributions, the higher the administrative costs are when disbursing to their organization.

What does that mean for your dollar?

7.82%



GIVING COMPARISON*

How does the CFD stack up with other forms of giving? Let's compare the average costs associated with giving to your charity directly using the most popular methods of giving and how they compare to through your paycheck with the Combined Fund Drive.



Personal Check

A personal check written directly to charity routinely costs up to \$20 to process.

Up to
\$20
per check



Mobile Giving

Transaction fees, keyword fees and annual set up fees create mounting costs that can affect your gift in big ways.

Up to
10%
per text



Online Giving

Using a credit card for recurring gift directly has transaction fees with your bank and software creators.

Up to
4-7%
per gift



Credit Card Giving

If you choose to use your credit card to give directly at an event, there are still bank fees that come with your gift.

Up to
3-8%
per gift



WASHINGTON STATE COMBINED FUND DRIVE

Giving through your paycheck is still one of the most cost effective ways to give to charities.

Giving through the CFD not only competes with most giving options, it beats most of them.

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.

FISCAL **MATTERS**



cash HANDLING

The CFD Cash Handling Policy applies to all state agencies and higher education institutions engaged in CFD fundraising activities. For questions about the CFD Cash Handling Policy, where to find forms, how to log fundraisers or transfer funds, please contact the CFD at (360) 902-4162, cfd@sos.wa.gov or visit our website www.cfd.wa.gov.

Cash Handling at Fundraising Events

There are five ways to make a donation at a fundraising event: cash, check, money order, credit/debit card or payroll contribution. All donations must be safeguarded during any fundraising events. Tips to use when handling donations at your fundraiser include:

- Keep cash and checks in a locked and secured location, like a locking cash box
- Donations at your fundraising event must be in the possession of a CFD volunteer at all times
- Once your fundraiser is over, two people must count and record cash and checks, initial and date the record
- Make a copy of your records for your own files
- Transmit cash, checks and their corresponding records to your fiscal department daily or by the next business day

When counting and recording cash and checks, list checks using a check log. Record cash and check totals separately, then add both together for a grand total (grand total must match the total on your Fundraiser Transfer Form). Check logs are available for download at www.cfd.wa.gov in the VOLUNTEERS section of our webpage.

Cash and checks received at fundraisers must be collected in full. Expenses and reimbursements must not be removed from donations given at fundraising events (see CFD Reimbursement Process for the correct way to receive reimbursements).

Checks received at fundraising events must be made payable to the **CFD or Combined Fund Drive**. If you receive a check written to a specific charity, return it to the donor. The donor can send the check directly to the charity or reissue the check payable to the CFD.

Transferring Funds to your Fiscal Department

All fundraisers must be entered online in the CFD system by Campaign Leaders prior to transfer funds (see page 21 for instructions).

Make copies of all documents submitted to your fiscal department for your records. When submitting your documents and funds to your fiscal department, make sure all of your information is on your Fundraiser Transfer Form.

Send your fundraiser funds and documents to your Fiscal Department prior to December 8, 2017. December 8, 2017, is the last day your Fiscal Department can transfer funds from your agency or higher education CFD 525 account to the Office of the Secretary of State's CFD 525 account to ensure your fundraiser will be disbursed to your charities in January 2018.

Your fiscal department does not need to make multiple transfers to the OSOS 525 account and may wait until all of your agency's fundraisers are complete before transferring all funds at one time.

Your fiscal department may transfer funds via the following methods:

- Inter-agency Payment (IAP): use SWV 0006745-17
- Journal Voucher: use agency code 085, account 525
- Warrant/Check

Any fundraiser dollars received by the OSOS Financial Services office after December 8, 2017 are not guaranteed to be disbursed to your chosen charities in January 2018 (4Q2017). If your fundraiser dollars are received after this date, your chosen charities will receive those funds in April 2018 (1Q2018).

If you or your fiscal department has questions about how to submit fundraisers, please contact the CFD at (360) 902-4162 or cfd@sos.wa.gov or Heather Lucas at (360) 902-4181 or heather.lucas@sos.wa.gov.

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

REIMBURSEMENTS

Any CFD volunteer may make purchases for the benefit of their agency fundraiser out-of-pocket and request reimbursement. State agencies and higher education institutions may pay for CFD fundraising expenses out of their state budget and request reimbursement from the CFD state office. **Remember, fundraising expenses must not exceed fundraising donations for each fundraising event.** Please contact the CFD state office for questions about reimbursement limits.

State employees who are seeking reimbursement for funds used to promote the CFD in their division must follow these instructions when filling out form A-19 for expense reimbursements. Before submitting any requests for reimbursement, please submit a Fundraiser Event Form to your agency's Campaign Leader highlighting how much money was raised at your event.

1. Make copies of all receipts, invoices, proofs of payment or fundraising forms for your records. Reimbursements cannot be made without these important pieces of information.
2. Complete and print the A-19 form (field names are listed below in red):
 - a. Agency name (**AGENCY NAME**)
 - b. Name and complete address of person receiving the reimbursement (**VENDOR OR CLAIMANT**)
 - c. Date of purchase or invoice (**DATE**)
 - d. Fundraiser name and brief description of purpose for the purchase (**DESCRIPTION**)
 - e. Total amount to fulfill expenses paid (**AMOUNT**)
 - f. Contact number (**TELEPHONE NUMBER**)
3. Sign form
4. Attach original receipts, invoices, proofs of payment or fundraising forms.
5. Present A-19 form with receipts to your agency fiscal personnel or Campaign Leader.

For questions please call the Combined Fund Drive at (360) 902-4162 or cfd@sos.wa.gov.

petty cash and change ACCOUNTS

Depending on the need, the CFD may fund CFD petty cash or change accounts within state agencies or higher education institutions. CFD petty cash and change accounts may only be used for CFD fundraising costs. Donations collected at a fundraising events cannot be used as petty cash or for a change account at any time.

There are two types of accounts available:

- Change account: funds used solely for making change that do not increase or decrease and do not reimburse purchases
- Petty cash account: funds used to make payments when issuing a warrant/check or using a state agency credit card is not practical or timely

If you feel your campaign will need a petty cash or change account, speak to your fiscal department and obtain its approval before sending the appropriate request form (found at www.cfd.wa.gov under the Volunteers section) to the CFD. The OSOS Financial Services office will work with your fiscal department to establish the account and proper controls. Establishment of CFD petty cash or change accounts is subject to OSOS Financial Services approval.

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

logging FUNDRAISERS

Once your agency fiscal department has transferred the funds to the OSOS, volunteers must enter their fundraiser into the CFD system so that CFD staff can reconcile the funds and earmark them for disbursement.

To log and transfer a fundraiser, please adhere to the following procedure:

1. The agency fiscal office gives the Campaign Leader the JV, warrant, or batch number (depending on the method of transfer) that was used to transfer the funds.
2. The Campaign Leader completes the Fundraiser Transfer Form (available under the Volunteers tab at www.cfd.wa.gov).
3. If necessary, Campaign Leaders can also use the Fundraiser Event Form or Tracking Fundraiser tracking Workbook to specify which charities the fundraiser money is to be transferred.
4. The Campaign Leader logs the fundraiser into the CFD online system (as seen on the next page) using the details from their Fundraiser Transfer Form.
5. The Campaign Leader sends the Fundraiser Transfer Form and supporting documentation to the CFD at PO Box 40250, Olympia, WA 98504 or to Heather Lucas and Maria Thomas at heather.lucas@sos.wa.gov and maria.thomas@sos.wa.gov.

To log a fundraiser, sign into your Campaign Leader account in the Volunteers section. Once logged in, click on the “Fundraisers” link:

The screenshot shows the Washington State Combined Fund Drive website. At the top, there is a navigation bar with links for "Charities", "Volunteers", and "Events". Below the navigation bar, there are links for "About - The CFD Mission", "Search - Find CFD Charities", and "Events - Upcoming Events". In the center of the page, there is a red button labeled "Reports". Below the "Reports" button, there are several other links: "Reports", "Manage Volunteer", "Change Password", "Fundraisers", and "Sign Out". A large purple arrow points downwards from the "Fundraisers" link towards the "Add Fundraiser" button on the "Manage Fundraiser" page.

To add a new fundraiser, click the “Add Fundraiser” button:

The screenshot shows the "Manage Fundraiser" page. At the top, there is a navigation bar with links for "Reports", "Manage Volunteer", "Change Password", "Fundraisers", and "Sign Out". Below the navigation bar, there is a checkbox labeled "View Completed Fundraisers". A table header is shown with columns: "Fundraiser ID", "Name", "Team Member", "Volunteer", "Transfer Amount", and "Created Date". At the bottom left, there is a button labeled "Add Fundraiser" with a plus sign icon. A large purple arrow points to the "Add Fundraiser" button.

A new window will open to a blank fundraiser form:

The screenshot shows the "Add a New Fundraiser" form. The form fields include: "Name" (text input), "Campaign Year" (dropdown menu showing "2017"), "Campaign" (dropdown menu showing "2017 Annual Giving Campaign"), "Fund Transfer Type" (radio buttons for "Check", "IAP Batch", "Journal Voucher", and "Credit Card", with "Check" selected), "IAP/Batch/JV/Check #" (text input), and "Transfer Amount" (text input). A large purple arrow points to the "Add Fundraiser" button on the previous page, indicating where to click to reach this form.

It's easiest to copy the information from your Fundraiser Transfer Form into the blank fundraiser fields. Give your fundraiser a name you and future CFD Campaign Leaders will recognize, like "2017 Chili Feed" or "2017 OSOS Fundraiser #1".

Select the radial button for the method your fiscal department used to transfer fundraiser dollars to the CFD and enter the number they provided in the "IAP/Batch/JV/Check #" field. Enter the dollar amount with no dollar sign.

Update a Fundraiser

FundraiserID
1456

Is Reconciled
False

Name
2017 OSOS Talent Show

Campaign Year
2017 ▾

Campaign
2017 Annual Giving Campaign ▾

Fund Transfer Type
 Check IAP Batch Journal Voucher Credit Card

IAP/Batch/JV/Check #
555555J

Transfer Amount
5000.00

Scroll down to enter the charities receiving the donations from your fundraiser. Enter the CFD charity code or select the charity name from the drop down menu.

NOTE: A charity can only be entered once in this module, so add donations together if you have multiple donations set to go to a single charity.

Charities

Amount	Charity Code	Name
	0316854	

Charity Code
0316854

Select a Charity
Choose a Charity ▾

Amount
3000

Add Charity

Balance: \$5000.00

Enter your charity details and click "Add Charity"



Enter the dollar amount designated for the charity and click the “Add Charity” button. Your charity and dollar amount will populate and the transfer amount balance will reduce:

Charities

Amount	Charity Code	Name	
\$3000.00	0316854	Combined Fund Drive	

Balance: \$2000.00

Charity Code

Select a Charity
Choose a Charity ▾

Amount

Add Charity

The charity and dollar amount are added

Continue adding charities until the balance reaches “\$0.00.”

Charities

Amount	Charity Code	Name	
\$3000.00	0316854	Combined Fund Drive	
\$1000.00	0456881	Chelan/Douglas CASA Program	
\$1000.00	1479848	Providence Sacred Heart Foundation	

Balance: \$0.00

If you need to designate donations to a program within a charity, you can scroll down and add it in the “Program Designation (optional)” section. Select the charity from the drop down menu, complete the fields and click “Add Program” when finished:

Program Designation (optional)

You can designate what programs the money should go to for a charity entered above. If so, you must allocate the entire donation amount to programs; no part of the donation amount can be left undesignated.

Charity Code	Charity	Program	Amount
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Charity
Providence Sacred Heart Foundation ▾

Program
Spokane Region

Amount
1000

Add Program

You can also add division details if necessary. This field can be used to differentiate between buildings, departments, donors or fundraisers:

Division Details (optional)

Division	Amount
Division	
Amount	

Add Division

Save Fundraiser

Click “Save Fundraiser” to finish



When you're finished, click the “Save Fundraiser” button. Your fundraiser is active and can be edited until CFD staff reconcile it and earmark it for disbursement. To edit or print a copy of your fundraiser, simply click on the text and the fundraiser will pop open:

Manage Fundraiser

[Reports](#) [Manage Volunteer](#) [Change Password](#) [Fundraisers](#) [Sign Out](#)

View Completed Fundraisers

Fundraiser ID	Name	Team Member	Volunteer	Transfer Amount	Created Date
1456	2017 OSOS Talent Show	Secretary of State, Office of the	HEATHER LUCAS	\$5000.00	05/17/2017

[+ Add Fundraiser](#)

Click on the fundraiser to edit



The print button is in the top right corner. Print a copy for your records:

Update a Fundraiser

FundraiserID
1456

Is Reconciled
False

Name
2017 OSOS Talent Show

Campaign Year
2017 ▾

Click on the printer button to print a copy



To view a completed fundraiser, click the “View Completed Fundraisers” button. You can view the details for any completed fundraiser in your agency by clicking on the text:

Manage Fundraiser

[Reports](#) [Manage Volunteer](#) [Change Password](#) [Fundraisers](#) [Sign Out](#)

[View Completed Fundraisers](#)

Fundraiser ID	Name	Team Member	Volunteer	Transfer Amount	Created Date
807	#282A-Golf For Veterans Sponsor Check-Evergreen Direct	Secretary of State, Office of the	HEATHER LUCAS	\$1000.00	10/03/2014
784	(052014) OSOS Weight Loss Contest	Secretary of State, Office of the	HEATHER LUCAS	\$58.00	05/20/2014
951	10-GL5194: Reallocated Donations per Donor Request	Secretary of State, Office of the	HEATHER LUCAS	\$225.00	06/09/2015
1188	1116C-2016 Memorial Day Coffee (entered 5/31/2016)	Secretary of State, Office of the	HEATHER LUCAS	\$207.68	05/31/2016

credit CARDS

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

Procedure

1. The Campaign Leader contacts the Combined Fund Drive state office with a request for a credit card link. Information on the event can include dates, times, itemized pricing when necessary (registration fees, T-shirt charges, etc.), what agency is to be given credit for the event and what charities the event will benefit.
2. CFD staff webtasks details of the event.
3. Once completed, CFD staff reviews the link and sends it to the volunteer for review.
4. The CFD volunteer holds their event.
5. Once the event has finished, the Campaign Leader generates a report (found in the Campaign Leader’s online profile under the “Reports” link called “Credit Card Report”). The report lists credit card donations generated from that specific event, as well as the breakdown of items or charities chosen.
6. The Campaign Leader logs the credit card donations as a fundraiser in their online profile using the procedure for logging fundraisers.

In the case of a fundraiser where both cash donations AND credit card payments were collected, credit cards must be logged and reported separately from cash.



CONTACT THE COMBINED FUND DRIVE

Stephanie Horn COMMUNITY PROGRAMS DEPUTY DIRECTOR	Philip Kerrigan PROGRAM MANAGER	Jerika Ferguson MARKETING AND DEVELOPMENT DIRECTOR	Dawn Baker RESOURCE COORDINATOR	Heather Lucas FISCAL AND POLICY COORDINATOR
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Each of our staff can provide a range of services that keeps the CFD going strong.

OSOS policies	General website requests	Publications and marketing materials for the CFD	Donor accounts	Reporting questions
Contacting agency leadership	Connecting with volunteers and County Committees	Website requests	General CFD questions and inquiries	Disbursement of funds to charity
OSOS leadership availability for events	Request for state CFD presence at fundraising events	Questions regarding CFD events and promotions	Requests for fundraising events or donations	Help with donation, reconciliation and payroll contribution issues
Communications with elected officials	Inquiries regarding legal issues	In-kind solicitation requests	Inquiries regarding reimbursements for fundraising events	Questions about WACs and internal CFD policies
Budgetary spending and overall program changes	Program questions and innovations	Social media inquiries	Supply order questions	Fiscal questions

360-902-4193

stephanie.horn@sos.wa.gov

360-902-4182

philip.kerrigan@sos.wa.gov

360-902-4154

jerika.ferguson@sos.wa.gov

360-902-4162

dawn.baker@sos.wa.gov

360-902-4181

heather.lucas@sos.wa.gov