WASHINGTON STATE COMBINED FUND DRIVE



CAMPAIGN LEADER HANDBOOK





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Fiscal Information is available in the CFD Fiscal Handbook





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 2018 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, pledging more than \$5 million annually for the last 13 years and more than \$140 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. Thank you again for all your efforts.

Sincerely,

Kim Wyman

Secretary of State





WHAT IS THE CFD?

For more than 30 years, the Combined Fund Drive (CFD) has developed a reputation as one of the best public employee workplace giving programs in the nation. The CFD was established in 1984 to consolidate the numerous charitable fundraising campaigns being conducted at state work sites. With the help of hundreds of volunteers, millions of dollars are donated each year to thousands of charities throughout our community. We provide a service to public employees to create a fun, easy, and enjoyable giving experience.

Our Values

- We connect state employees, retirees and higher education employees 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 MISSION

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



OUR DONORS

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

State Employees

Each state employee is eligible to give through payroll contribution or at a agency fundraising event.

There is more than 200 state agencies that can participate in the CFD.

Higher Education Personnel

Technical, community colleges or four-year universities personnel are eligible to give through payroll contribution.

They may even give back to their own institutions through the CFD.

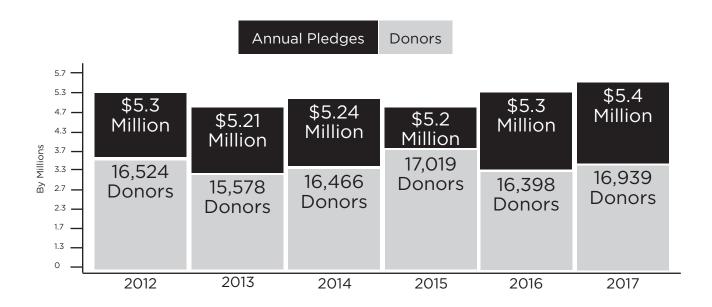
Retirees

Any state or higher education employee who has retired may continue to donate through their pension via CFD.

This option automatically rolls over. They may cancel their donations at anytime.

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



FACT: More than 16,000 donors give through their paychecks every year!

That is only 15% of all state employees of Washington.



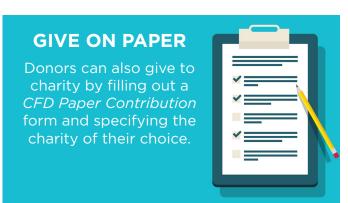
WAYS TO GIVE

PAYROLL CONTRIBUTION

The best way for employees to connect with their favorite charities in a consistent and secure way 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.

The CFD Volunteers can choose what charities they want their fundraising dollars to support. Fundraiser dollars transferred to the CFD are disbursed quarterly. Donations directly to the CFD Non-Specified Account (see pg. 17) 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 CFD during the campaign. The CFD will not accept checks made payable to a specific charity. Each check must be accompanied by a *CFD 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. Credit card links must be requested a month prior to the event.

FACT: The average donation made through the CFD is \$10, last year that raised over \$5.3 million dollars!



VOLUNTEER TRACKER

Volunteering is just as important to our member charities as receiving a monetary gift. State employees may log their volunteer hours with any of our member charities. At the end of the CFD Annual Giving Campaign, a special recognition is given to agencies that log the most volunteer hours.

Search

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

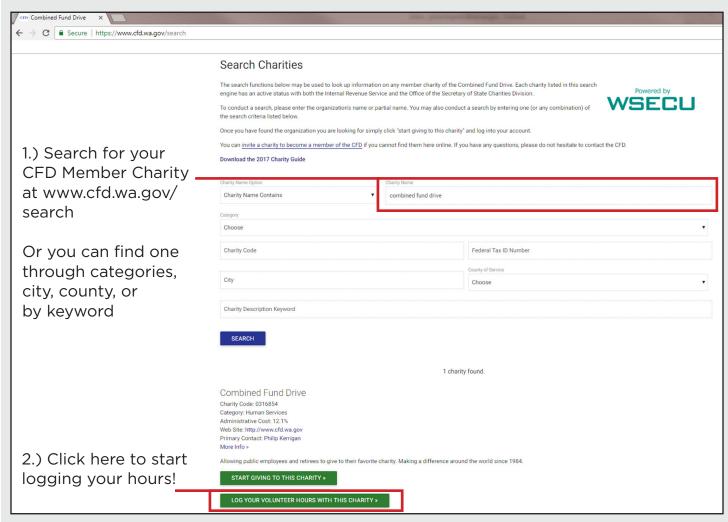
Log

Donors can log volunteer hours for any CFD Member Charity through the search engine or from your *myCFD* account.

Get Recognized

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

A quick way to log your volunteer hours...





OUR CHARITIES

For a charitable organization it is simple and easy to sign up to become a CFD Member Charity.

There are two requirement to join the CFD:



Be registered with the IRS as a charitable organization. Either a 501(c)3 or 170(c)1.

and

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



BENEFITS TO 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, reducing administrative and development costs, which 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 pledges 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.

Plus, CFD Member Charities have a chance to be a featured guest (on a first-come, first-served basis) in our Friday Flix and Podcasts for Good spotlight.







FACT: More than 4,500 charities currently participate in the CFD.



OUR VOLUNTEERS

The CFD has more than a 1,000 volunteers statewide who help administer the program. This would not be a successful program without the tireless efforts of its volunteers. Here are the different CFD volunteer roles and responsibilities:



EXECUTIVE SPONSORS

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

Duties can include:

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



CAMPAIGN LEADERS

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

Duties can include:

- Recruiting Local Coordinators
- Logging fundraisers
- Ordering CFD supplies
- Building an agency-wide theme or use CFD's current theme



LOCAL COORDINATORS

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

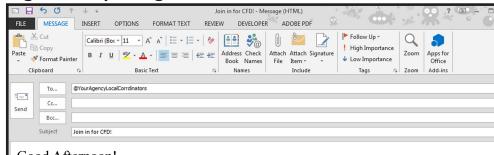
Duties can include:

- Planning fun events
- Building local teams
- Promote giving
- Report results to agency's CFD Campaign Leaders

TIPS & TRICKS

- As a Campaign Leader it is important to show support to your Local Coordinators across the state who will be running their local campaigns.
- Make sure you know who your volunteers are, what events they're planning, and if they need help from management.
- If the previous Local Coordinator can not volunteer make sure you find their replacement.

A good sample might look like:



Good Afternoon!

I am Jane Smith, the CFD Campaign Leader for our agency for the 2018 Washington State Combined Fund Drive Annual Giving Campaign. You're receiving an e-mail because you were previously a CFD Volunteer. Please let me know if you can volunteer with us again! And if you can't, let me know who will replace you. Thank you!

Jane Smith
Program Specialist 3
Office of the Secretary of State
555-555-5555 | www.cfd.wa.gov
#WashingtonGives



YOUR ROLE

As the Campaign Leader of your agency read below about your role in the CFD:

LEAD.

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

- Work to craft a general agency campaign theme (you can make your own or use CFD's)
- Communicate regularly with all your Local Coordinators across Washington
- Communicate regularly with your agency management

ACT.

As the lead, you can conduct your agency campaign the way you choose. You can craft agency-wide promotions like online auctions, or allow your Local Coordinators 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 (prior to December 7, 2018)
- Put together your own office events with your team
- Share your campaign results with your CFD Volunteers, management, donors, and Local Coordinator

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 Local Coordinators in offices statewide
- Work with your Executive Leader to appoint Local Coordinators
- Enter new Local Coordinators and manage existing Local Coordinators in the CFD database
- Build your own local team of volunteers for your own office events

Did you know...

Our state giving program is ranked 3rd in the country in giving behind only Texas and California?











MAKE YOUR CAMPAIGN A SUCCESS

Here are the first three simple steps to make your campaign successful



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 CFD Coordinator trainings, CFD Coordinator kickoff events, and charity fairs
- Use CFD staff as a resource to ask questions
- Network with other CFD Volunteers
- Explore the CFD website at www.cfd.wa.gov for a ton of information



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 agency leadership is engaged by:

- Meeting with your manager and asking them to send e-mails, sign letters or include the CFD as an agenda item at management and staff meetings
- Keep your manager informed along the way
- Get your agency leadership to participate in events (Maybe even have them even be the Emcee!)



BUILD YOUR TEAM

The most effective campaigns are run by volunteers who are each great at something different. Consider these tips when building your team:

- Recruit other enthusiastic, excited, passionate people from all areas of your unit of and different job classifications, and backgrounds to help you with the campaign
- Give everyone a role (create a website, design flyers, planning, speaker, set-up)
- Set realistic goals for the event and your team



MAKE YOUR CAMPAIGN A SUCCESS

Here are the next final three simple steps to make your campaign successful



CREATE YOUR CAMPAIGN PLAN

Before you hold an event or campaign, develop a plan that fits the culture of your agency. Some tips to keep in mind when creating your campaign plan:

- Implement your plan according to your own timeline
- Include how you are going to communicate your fundraiser
- Be sure to get on agendas for meetings with your management
- How are you going to pay for any expense that may occur



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. Have details about the charity and where the dollars are going in the community. Think local!
- Schedule a charity speaker and use resources (publications, the CFD Website, internal agency newsletters or sites, and e-mails about the fundraiser



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:

- Your management for supporting CFD and you!
- Your office volunteers for helping make the campaign a success. And your Local Coordinators across Washington for their efforts. Their success is yours and your agency's success
- Your coworkers for considering giving to their favorite charities through CFD
- Your charity participants



OUR ETHICS

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 CFD 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 CFD 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, you are a CFD Volunteer
- 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.

The following state agencies are not allowed under their internal agency policies to solicit local business for in-kind donations:

- Department of Revenue
- Department of Labor Industries
- Office of Financial Management
- Department of Financial Institutions
- Washington State Gambling Commission

Internal state agency policies regarding in-kind donation solicitation superceded CFD State Office policies. Please contact you agency ethics officer for clarification.



CFD GAMBLING RULES

You may not as a Washington State employee gamble for CFD events or on state time.

What is Gambling? (RCW 9.46)

Gambling activities involve three elements:

- Chance (Luck or chance determines winner, not skill)
- Prize (The item a winner receives at the end of the game)
- Consideration (Purchasing of an item by the player; do I need to pay to get in?)

If one of the three "gambling" elements is removed, it is no longer gambling. For example, its not gambling if:

- Entry into a contest is free (no consideration)
- Winners are chosen based on their skill (not chance)

What is a Raffle? (RCW 9.46.0277)

A raffle is a gambling activity, where tickets are sold and prizes are awarded based on chance.

- Tickets must be consecutively numbered or printed with letters or symbols that don't repeat.
- No free tickets or tickets as gifts.
- Tickets must be sold for the same price. (All tickets must be of equal value. No break in price)

Records must be kept for one year from your raffles.

EXAMPLE

You are holding an event that you are handing out Door Prize Tickets. This event has a suggested donation of \$10. Regardless of suggested donation, every individual that comes through the door must receive a Door Prize Ticket. It is *Chance* that an individual wins and the ticket winner receives a *Prize*. Since you have eliminated *Consideration* by giving everyone a Door Prize Ticket, this is no longer gambling.

YOU MUST ELIMINATE ONE OF THE THREE GAMBLING ELEMENTS.

Can I have an Auction?

Auctions are not gambling because the winner is the highest bidder (not *Chance*). This includes silent auctions and "live" auctions where bids are called out. Anyone can offer an auction.



CFD GAMBLING RULES

OTHER EXAMPLES

- CFD Masquerade Ball Casino Night: Each guest receives a ticket to redeem chips for Casino Night (no purchase is necessary to receive more chips); Chance determines the winner; The top three players with the most chips receive a prize at the end of the night CONSIDERATION is removed = Not Gambling
- Door prizes at a fundraising event: Each guest receives a door prize ticket upon entry; Winners are determined via a drawing; Each winner receives a prize
 - If there's no purchase to enter, CONSIDERATION is removed = Not Gambling
 - If there's a purchase to enter, CONSIDERATION, CHANCE and PRIZE exist = Is Gambling
- March Madness Fundraiser: March Madness sheets are distributed to the office; Players advance based off of the play of each participating team; The winner decides what charity the fundraiser dollars support

PRIZE is removed = Not Gambling

- CFD First Week to Give: Participants increase or begin a \$5 monthly donation and receives a \$5 Starbucks gift card from the CFD CHANCE is removed = Not Gambling
- CFD Last Week to Give: Each day of the week, a drawing occurs for donors of the CFD (small agency, medium agency, large agency, volunteer hours and all donors); Winners are determined via a drawing; Each winner receives a prize

CONSIDERATION, CHANCE and PRIZE exist =This is Gambling

 Agency Fundraiser Ring Toss Game: Each guest must buy entry to participate; Skill determines winner; Each winner receives a prize

CHANCE is removed = Not Gambling

• Bingo Fundraisers: Each player buys a bingo card to play; Chance determines winner; The winner receives a prize

CONSIDERATION, CHANCE and PRIZE exist =This is gambling

FACT: The CFD is one of the only charitable activities that is allowed during state time.



Giving Campaign Schedule TIMELINE

The CFD Annual Giving Campaign kicks off in October 2018, but there's a number of events and deadlines throughout the year.

Important Dates to Remember				
Campaign Leader	June 2018			

Training

CFD State Office will

August 2018

August 2018

Local Coordinator August 2018
Training

CFD Annual Giving Campaign Kickoff	October 1, 2018
CFD Campaign Results Posted	Ongoing throughout campaign
Submit Fundraisers	Prior to December 7, 2018

Campaign Planning Checklist

mail Campaign materials

Task	Due Date	Complete
Recruit your volunteer team	July 31, 2018	
Design a campaign plan	July 31, 2018	
Obtain agency leadership support	July 31, 2018	
Add your Local Coordinators to the CFD database (cfd.wa.gov)	July 31, 2018	
Order supplies through the CFD Fulfilment Center (cfd.wa.gov)	August 2018	
Local Coordinators Training	August 2018	
Run your CFD Annual Giving Campaign	October - December 2018	
Thank employees, management, volunteers, donors, and charities	November - December 2018	
Transfer fundraiser dollars to the CFD State Office and OSOS Financial Services Prior to December 7, 2018 If your fundraiser is not transferred to OSOS finance by December 7, 2018, there's no guarantee your fundraiser will be disbursed in January 2019. Fundraisers transferred after this date may be disbursed in April 2019.	Prior to December 7, 2018	
Nominate volunteers for county and/or state awards	December 31, 2018	
Share your agency results and evaluate your campaign	January 2019	
If available, attend the recognition event in your area	February - April 2018	



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.

ONLINE GIVING

Using your credit card to start a gift with your charity through their website.



Network for Good 3.95%

Razoo 6.9% (+\$.30 per transaction fee)

Indigogo 10.75% CrowdRise 9.9%

First Giving 7.5% (plus subscription fee)

JustGiving 5%

PayPal 2.2% (plus \$.30 payment fee)

Bank Fees Add 3% to each transaction

In 2017 the CFD was at 9.24%

That's with ease, safety, and security of knowing where your personal information is going.



FINANCIAL PICTURE 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 classification of expenses: operational and fundraising.

Operational Expenses

The CFD has operational costs that are accrue throughout the year. Below are the costs for 2017:

Employee Salaries \$246,073.33 Employee Benefits \$95,550.92 Purchased Services Contracts \$262.413.28

To help administer the program statewide, the Combined Fund Drive entered into contractual agreements with different organizations:

- University of Washington
- Department of Social and Health Services

General Supplies	\$8,804.13
Communications (telephone)	\$1,453.10
Rent and Utilities	\$4,142.45
Data Processing	\$5,737.97
Shipping and Postage	\$3,412.51
Employee Development Training	\$1,999.17
Subscriptions	\$107.45
Travel	\$14,750.51
Fiscal Services	\$36,000.00

The Office of Secretary of State supports the Combined Fund Drive by providing fiscal processing services throughout the year. This service is noted through a monthly fee.

Other Goods and Services \$12,137.79

Total Operational Expenses \$692,582.87

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.

Fundraising Expenses

The CFD also incurs costs associated with marketing materials and fundraising events. Below are the fundraising costs in 2017:

Printing & Reproduction

\$11.836.28

The Combined Fund Drive creates publications and purchases promotional materials to assist volunteers in raising awareness. Some examples include:

- Posters
- General Campaign Rack Cards
- Charity Guides
- New Employee Rack Cards
- Retiree Rack Cards

Marketing &Advertising

\$7.869.66

To raise awareness during the campaign, the CFD also purchases promotional items to give out at events.

Some examples include:

- Balloons
- Wristbands
- CFD pens

Fundraising Event Costs

\$77,880.18

The CFD conducts fundraising events throughout the year to help lower administrative costs. Some of these events include:

- Football Kickoff Online Auction
- 2017 Golf for Veterans Tournament
- 2017 Masquerade Ball

Reimbursements to Agencies \$14,842.44

Volunteers of the Combined Fund Drive are entitled to reimbursement through the standard statewide reimbursement process. Some examples of costs for reimbursement include:

- 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 \$112,428.56

Total Operational Expenses **\$692,582.87**



Total Fundraising Expenses \$112,428.56

TOTAL EXPENSES \$805,011.43



NON-SPECIFIED FUND

In addition to raising fund for charities throughout our community, the CFD also works to raise money for the non-specified fund. Hundreds of donors give thousands of dollars through payroll contributions and fundraising events. Any administrative costs associated with running this program are taken from this fund first. Any remaining costs are charged to our member charities.

Non-Specified Payroll Contribution \$222,567.89

Non-Specified Fundraising Dollars \$132,997.28



TOTAL SPECIFIED INCOME \$355,565.17

FINANCIAL PICTURE BOTTOM LINE

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.

TOTAL EXPENSES \$805,011.43



TOTAL NON-SPECIFIED INCOME \$355,565.17

TOTAL REMAINING COSTS \$449,446.26

Why do we say average charge to charity?

The Combined Fund Drive splits its remaining costs among the charities receiving funding from specified income. The costs are administered on a percentage of the whole. Meaning the more a charity receives in specified contributions, the more their percentage will be when disbursing to their organization.

TOTAL SPECIFIED INCOME \$4,866,476.14

MINUS

TOTAL REMAINING COSTS \$449,446.26

EQUALS

TOTAL DISBURSED TO CHARITIES \$4,417,029.88



AVERAGE PERCENTAGE CHARGED TO CHARITIES

9.24%

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Stephanie Horn

COMMUNITY **PROGRAMS DEPUTY DIRECTOR**

Philip Kerrigan

PROGRAM MANAGER Jerika Ferguson

MARKETING AND DEVELOPMENT DIRECTOR

Dawn Baker

RESOURCE COORDINATOR **Heather Lucas**

EMM

FISCAL AND POLICY COORDINATOR

Each of our staff can provide a range of services that keeps the CFD going strong.

OSOS policies

Contacting agency leadership

OSOS leadership availability for events

Communications with elected officials

Budgetary spending and overall program changes

360-902-4193 stephanie.horn@sos.wa.gov General website requests

Connecting with volunteers and County Committees

Request for state CFD presence at fundraising events

Inquiries regarding legal issues

Program questions Social media and innovations

360-902-4182 philip.kerrigan@sos.wa.gov Publications and marketing materials for the CFD

Website requests

Questions regarding CFD events and promotions

In-kind solicitation requests

inquiries

360-902-4154 jerika.ferguson@sos.wa.gov Donor accounts

General CFD questions and inquiries

Requests for fundraising events or donations

Inquiries regarding contribution issues reimbursements for fundraising events

Supply order questions

360-902-4162 dawn.baker@sos.wa.gov

Reporting auestions

Disbursement of funds to charity

Help with donation, reconciliation and pavroll

Questions about WACs and internal CFD policies

Fiscal questions

360-902-4181 heather.lucas@sos.wa.gov

