

# WASHINGTON STATE COMBINED FUND DRIVE



## CFD MEMBER CHARITY WELCOME PACKET



WASHINGTON STATE  
**COMBINED**  
FUND DRIVE

f i t v a a  
**CFD.WA.GOV**

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# WASHINGTON STATE COMBINED FUND DRIVE

## WELCOME

Welcome to the Washington State Combined Fund Drive (CFD) giving program! As a CFD Member Charity, you are a part of a statewide organization that is helping make positive change in our communities.

We have designed this packet for you to better understand how your organization can benefit through sustainable donations, enthusiastic volunteers, and unique fundraising events.

The benefits for organizations like yours are clear:

- It saves your development time and money
- Our pledge fulfillment rate is 90%, allowing our member charities the chance to plan their budgets for the year to come
- Much of our funding is non-restricted, giving your organization the flexibility to fund programs
- Our disbursement system sends you four quarterly checks or EFTS, simplifying efforts for your finance department

Thousands of state employees across Washington use this method to give to charities. In 2017, more than \$5.4 million was pledged to CFD Member Charities. Some charitable organizations even use the CFD as their primary source of funding.

Participating in the CFD can provide access to thousands of potential donors and volunteers. It will also give you a range of opportunities to have your mission heard in unique new formats.

## OUR MISSION

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

# CHECK LIST

This simple check list will help your organization understand how to use the CFD more efficiently.

- ☐ Be registered with the IRS as a charitable organization (either a 501(c)3 or 170(c)1).
- ☐ Be registered with the Washington State Office of the Secretary of State Charities Program.
- ☐ Visit [www.cfd.wa.gov](http://www.cfd.wa.gov) to sign-up or update information for your CFD Account.
- ☐ Complete the Combined Fund Drive online application and submit.
- ☐ Complete the Statewide Vendor Form (SWV) and submit to ensure a smooth transfer of funds into your account. The application is located on your CFD Application.
- ☐ Place your organizations renewal date on your internal organization calendar to remind yourself when to renew. (Charities that are not active will not receive funding).
- ☐ Welcome to the program!
- ☐ Add [cfid@sos.wa.gov](mailto:cfid@sos.wa.gov) to Safe Sender list in your e-mail account. (Our e-mails will provide opportunities for your organization and quarterly fiscal information).
- ☐ Visit [www.cfd.wa.gov/calendar](http://www.cfd.wa.gov/calendar) and send us an e-mail ([cfid@sos.wa.gov](mailto:cfid@sos.wa.gov)) to submit your events on our public calendar
- ☐ Place your seven-digit CFD Charity Number on publications and websites for state employees to find you and start giving. You may request a direct link for your website to connect donors to start giving to you through their paycheck.
- ☐ Go to page 8 for tips your organization can use through the CFD. You can find out how to sign-up for the Speakers Bureau and many more opportunities!

# CFD BASICS

We understand that you may have questions about why the CFD exists and how it works. The CFD was founded in 1984, and by 2003 the CFD had become official state law.

## HOW CFD WORKS

State offices across Washington have CFD Volunteers who administer the program. Our CFD Volunteers are trained by state CFD Staff who are located in Olympia, Washington.

### STATE CFD STAFF

Four full-time staff members work to administer the program statewide. Some of their roles are:

- Training volunteers and assisting in events
- Charity Outreach, including social media
- Budgetary reconciliation and policies
- Social media, publication, marketing
- Promote charitable giving

### CFD VOLUNTEERS

More than 1,500 volunteers work tirelessly to raise money for charitable causes. Some of their many roles include:

- Hosting local events
- Volunteering at charities
- Requesting charity speakers
- Promote charitable giving and the CFD
- Recruits a team to help with events

## CFD DONORS

There are different types of donors that participate in the CFD through payroll contribution the following are individuals that can give through the CFD to charitable organization of their choice:

### State Employees

Can give through payroll contribution or at a agency fundraising event.

### Higher Education Personnel

Includes Technical, community colleges or four-year universities personnel

### Retirees

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

*Also eligible: Port of Olympia, Seattle Housing Authority, Snohomish County PUD, and any private citizen paying at a CFD fundraising event.*

## WAYS DONORS CAN GIVE

- **Monthly:** Donation is taken out each paycheck and runs until employee cancels or separates from state government.
- **One-Time:** Donation is taken out on specified date.
- **Limited-Time:** Donation is taken from each paycheck at a specified time.
- **Fundraisers:** Volunteers put on events and guests can choose to give during this time

## GIVE THIS SECTION TO YOUR FISCAL AND POLICY STAFF

This section offers five things for to remember:

1. Log in to your CFD Account
2. Remain active at OSOS
3. Fill out SWV
4. Keep your information updated
5. Follow the rules for solicitation

These items are essential not only for your role in the CFD but for your success as an operating charity in Washington State.

### 1) Login to your CFD Account at [WWW.CFD.WA.GOV](http://WWW.CFD.WA.GOV)

**Each charity must complete application to join the CFD.** Make sure to log in to your CFD Account using your seven-digit CFD Charity Code. From here you will be able to:

- Update your organizational description
- Enter your administrative cost
- Update your contact information
- Select your category and county of service
- Renew and agree to our certification statements

### 2) Remain active with OSOS Charities Program

To be an active CFD member charity, a charity must meet two requirements:

- 1) Be registered as a 501(c)3 or 170(c)1 with the IRS; and 2) Be registered as an active charity with the Office of the Secretary of State (OSOS) Charities Program.

**TIP: SET A REMINDER ON YOUR ORGANIZATIONS PUBLIC CALENDAR.**

It's vital for CFD Member Charities to remain active with the OSOS Charities Program. If an organization has been labeled with any status other than active, CFD donors can no longer give to that organization and donors cannot find that organization in the CFD Search Engine. This is an annual renewal and must be done through OSOS. There is no mechanism to re-establish previous donations.

#### TIPS TO REMAIN ACTIVE WITH THE OSOS CHARITIES PROGRAM

- Know your organization's Washington State OSOS Charity Program registration number.
- Complete and submit the proper forms, these forms can be completed online:
  - To register: *Charitable Organization Registration / Re-Registration Form*
  - To renew an annual registration: *Charitable Organization Renewal*
- Get your renewal in early! Consider submitting your renewal early April 1<sup>st</sup> or October 1<sup>st</sup>

### 3) Register SWV Form to accept donations

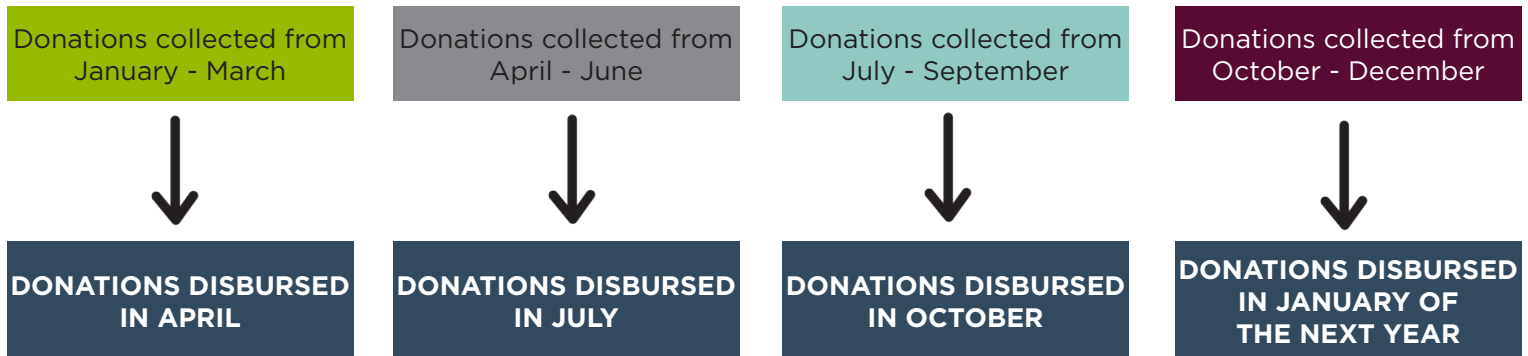
Any CFD Member Charity can receive CFD disbursements via electronic transfer. Charities must register for a Statewide Vendor Number (SWV) with the Department of Enterprise Services Statewide Payee Desk. This number can be used to receive electronic payments from any Washington State agency, like the CFD. If you don't a physical check will be mailed to location on file. Login to [www.cfd.wa.gov](http://www.cfd.wa.gov) to sign-up for your SWV.



## **4) Keep your information updated to receive pledged and actual donations**

### **DISBURSEMENT**

The CFD issues quarterly disbursements to all CFD member charities that donors have selected to donate to in any given quarter. The CFD adheres to the following schedule for quarterly disbursements:



*The CFD reserves the right to issue special disbursements based on need.*

You may find your report anytime via Fund Disbursement in your CFD Account by logging in at [www.cfd.wa.gov](http://www.cfd.wa.gov).

## **5) You must follow the rules of Solicitation to WA State Employees**

### **DONATION INFORMATION**

When a charity receives a CFD quarterly disbursement, an automated email is sent from the CFD to the main email contact on file for the charity containing a CFD Fund Disbursement Report.

The email address on file will receive this report:

- All donations and fundraisers collected and disbursed during the quarter.
- Donation information for any donor who does not choose to remain anonymous appears in this report.

The Fund Disbursement Report is broken out by quarter, utilizing tabs at the bottom of the Excel spreadsheet. As each quarter passes, the reports are updated.

Donor contact information is provided to CFD Member Charities to acknowledge donors or invite for trainings only. Solicitations of state employees at home or work addresses (physical or email) is not allowed per the CFD Discontinuation of Contact Policy.

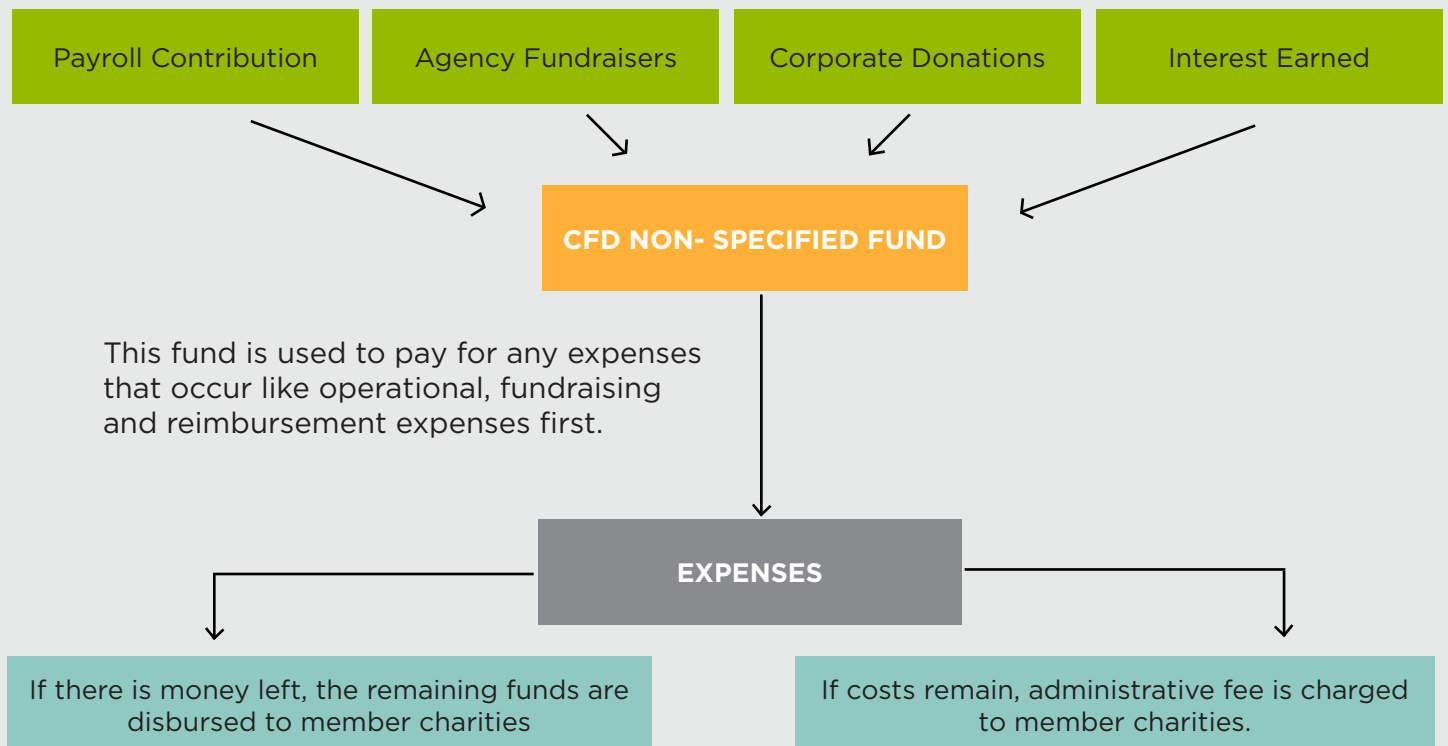
# ADMINISTRATIVE COSTS

The CFD does not receive any taxpayer funding from the State of Washington to administer the program. As a 170(c)1, the CFD is eligible to participate in the CFD to raise funds to support itself and lower administrative cost to our member charities.

Administrative costs are reported on Fund Disbursement Reports as one-time deductions under the name “CFD general fund”. In 2017, CFD administrative costs were 9.26% to CFD member charities.

## How it works

The CFD receives some direct payroll contribution, agency fundraisers, corporate donations and interest earned that is placed in the CFD Non-Specified fund.



If there is any remaining costs within the quarter, an administrative percentage is taken from each member charity receiving a quarterly disbursement.

- Charities that do not receive donations during a quarter are not charged.

However, if costs are less, the member charity receiving donations in that quarter receives 100% of donations specified to them plus a percentage of the donations in the CFD Non-Specified Fund.

- The extra dollars in the CFD Non-Specified Fund are disbursed to CFD member charities based off the amount received of all dollars disbursed during that quarter.

# OPPORTUNITIES FOR SUCCESS IN THE CFD

The following are opportunities are for your charity to be better involved with the CFD. Head to [www.cfd.wa.gov](http://www.cfd.wa.gov) for more details and direct sign-up links.



## FRIDAY FLIX VIDEO SHOOTS

Our videos are sent to over a 1,000 CFD volunteers through an e-mail blast, posted on CFD social media, and on our video web page.

**This video sign-up is a first-come-first-serve bases.** There are a limited amount of slots each season.



## SPEAKERS BUREAU

Speak directly to potential donors and volunteers in state agencies. This format gives our volunteers the chance to connect with you and your charity's mission!

**This option is available to sign-up anytime.** Our CFD Volunteers will be able to find your organization's information to ask your organization to come speak directly to their staff.



## PODCASTS FOR GOOD

Speak with the CFD about who you serve and what is happening in the communities around us. This podcast is posted on our website, iTunes and Google Play, our social media pages and through e-mail blasts.

**These podcast sign-ups are on a first-come-first-serve bases.** There are a limited amount of slots each season.

**Have you been featured on Podcasts for Good or Friday Flx?  
Ask for our logo for your website and we will send you a direct link!**

# OPPORTUNITIES FOR SUCCESS IN THE CFD

The following are opportunities are for your charity to be better involved with the CFD. Head to [www.cfd.wa.gov](http://www.cfd.wa.gov) for more details and direct sign-up links.

## SEND US YOUR EVENTS

Place your events on our Events Calendar page by sending [cfid@sos.wa.gov](mailto:cfid@sos.wa.gov) an e-mail with:

- Your charity's name
- Date
- Time
- Location
- Link to event

## EVENT BOOTHS AND CFD VOLUNTEER EVENTS

There are opportunities to set-up a table and mingle with CFD donors and volunteers.

Here are just a few:

- Public Service Recognition Week (May)  
With over 120,000 state employees around Washington, this is a good week to recognize public servants on your social media. Let them know that state employees can give through their paycheck to your organization through the CFD. (Use your 7-Digit CFD number!)
- CFD Masquerade Ball (October)
- LNI Charity Fair (September)
- King County Kickoff Charity Fair (September)

There are a ton of other opportunities with CFD Volunteers around the state. Make sure you sign-up for the Speaker Bureau so they can find you and invite your organization to engage with our state employees.

## ADD US TO YOUR PUBLICATION AND WEBSITE

Each CFD Member Charity receives a unique 7-digit charity code from the CFD, giving Washington state employee donors the ability to find your organization easily through our CFD search engine and start giving to you to today.

### TIP:

Request a one-click link for your organization to use to on your website with one of our CFD Badges. This will help state employees know that you are connected to the program and gives an easy and sustainable method of giving right from their paycheck.



## WASHINGTON STATE EMPLOYEE GIVING BADGES

Let state employees visiting your website know that they can donate through their paycheck to your organization with a CFD Badge. Let us know if you are looking for something different!

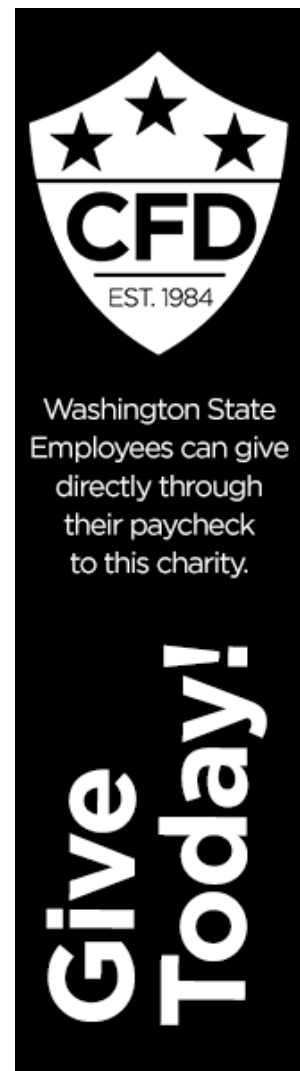
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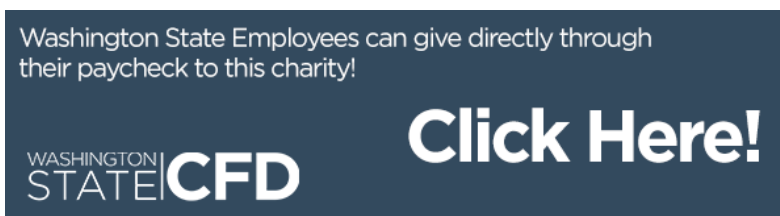
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Size: 160x600



Size: 600x160





## CONTACT THE COMBINED FUND DRIVE

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PROGRAMS  
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DIRECTOR

**Philip Kerrigan**

PROGRAM  
MANAGER

**Jerika Ferguson**

MARKETING AND  
DEVELOPMENT  
DIRECTOR

**Dawn Baker**

RESOURCE  
COORDINATOR

**Heather Lucas**

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

General website  
requests

Connecting with  
volunteers and  
County  
Committees

Request for state  
CFD presence at  
fundraising events

Inquiries regarding  
legal issues

Program questions  
and innovations

Publications and  
marketing  
materials for the  
CFD

Website requests

Questions  
regarding CFD  
events and  
promotions

In-kind solicitation  
requests

Social media  
inquiries

Donor accounts

General CFD  
questions and  
inquiries

Requests for  
fundraising events  
or donations

Inquiries regarding  
reimbursements  
for fundraising  
events

Supply order  
questions

Reporting  
questions

Disbursement of  
funds to charity

Help with  
donation,  
reconciliation and  
payroll  
contribution issues

Questions about  
WACs and internal  
CFD policies

Fiscal questions

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