

## 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>

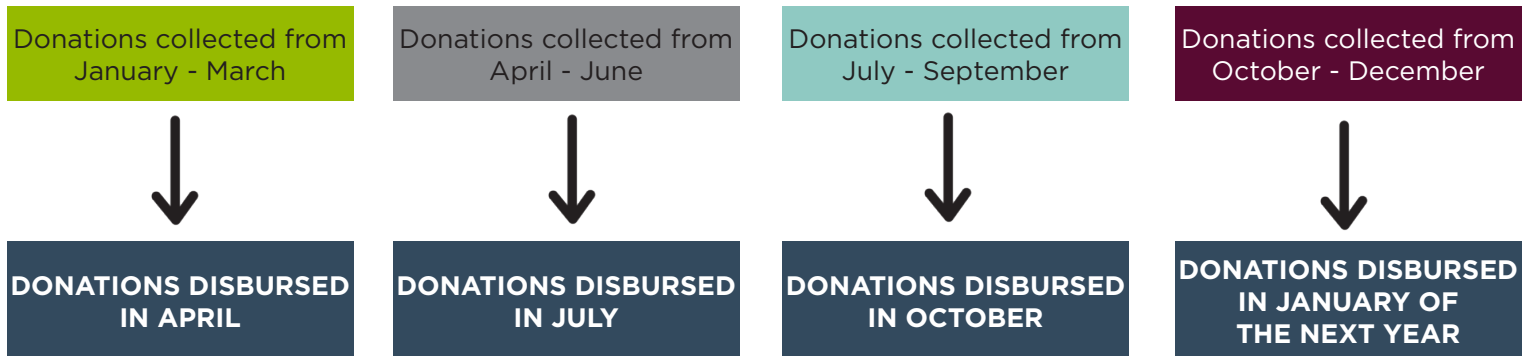
### 3) Register SWV Form to accept donations

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.

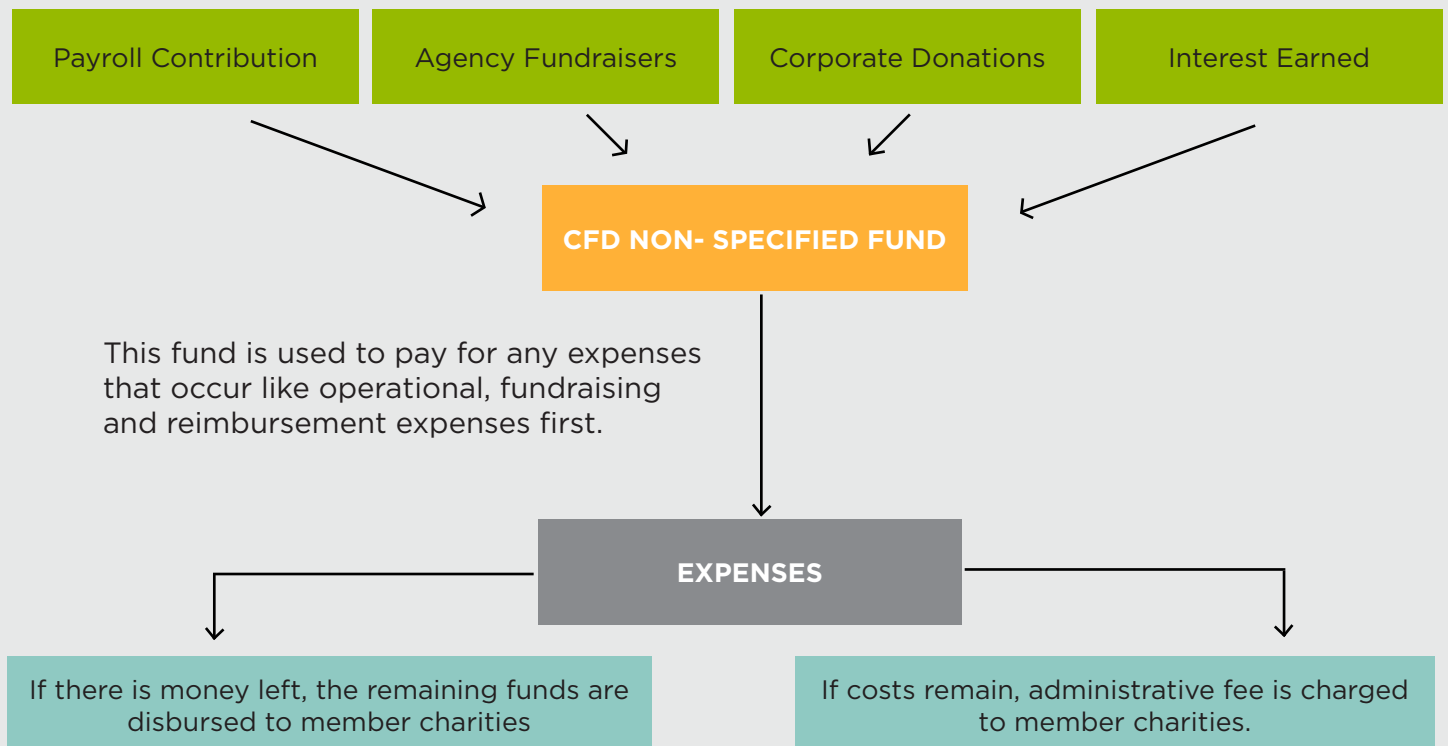
# ADMINISTRATIVE COSTS

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.