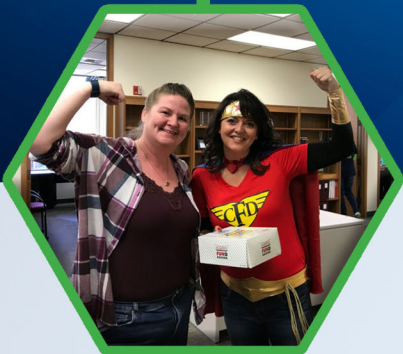




WASHINGTON STATE
COMBINED
FUND DRIVE



2019 ANNUAL PLAN

CFD CONNECTS...

ANNUAL | PLAN

This Annual Program Plan is for the purposes of executing the 2019 Combined Fund Drive (CFD) Annual Charitable Giving Campaign and is adopted by the CFD, in partnership with the Advisory Council and endorsed by the Office of the Secretary of State (OSOS).

This plan covers the second year of the CFD Five-Year Strategic Plan, focusing on a one-year period (January 1 – December 31, 2019) and consisting of a set of operational objectives and methods to achieve these goals.

The Combined Fund Drive's 2019 operational objectives include:

GOAL #1

Create and implement tools that allow the CFD to become a better resource for volunteers.

GOAL #2

Review and revise web priorities, maximizing resources and making room for program expansion.

GOAL #3

Continue to cultivate relationships with volunteers and leaders at higher education institutions.

GOAL #4

Develop sustainable strategies that work to lower costs associated with operating the CFD, aiming to lower administrative charges to member charities below nine percent.

OTHER GOALS:

- Migrate CFD web materials and branding to www.give.wa.gov
- Begin planning a large-scale CFD event with multiple partners

Progress in achieving these objectives will be evaluated at each quarterly CFD Advisory Council meeting. A final analysis will occur at the end of the 2019 Annual Giving Campaign.

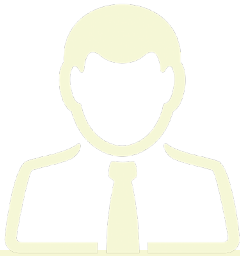
Please note that these program objectives do not account for unforeseen budget cuts or changes in statewide agency operations.

GOAL | #1

Create and implement tools that allow the CFD to become a better resource for volunteers.

In the Five-Year Strategic Plan, CFD staff set the goal of becoming a leader in the field of philanthropy. In order to achieve this goal, the CFD must become a top-notch resource for each of the program's stakeholders, including volunteers.

Volunteer Roles Include:

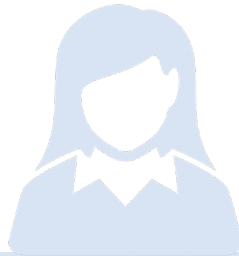


Executive Leaders

The executive leader, appointed by the agency director, provides key support to volunteers.

Duties may include:

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

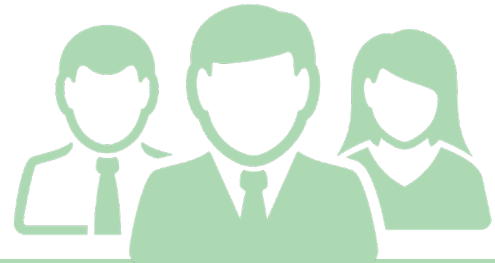


Campaign Leaders

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

Duties may include:

- Recruiting volunteers
- Logging fundraisers
- Ordering supplies
- Building an agency-wide theme



Local Coordinators

Local Coordinators run giving campaigns in local offices.

Duties may include:

- Planning fun events
- Building local teams
- Promote charitable giving
- Reporting results to Campaign Leaders

Tasks

This goal can be achieved through the following methods:

- Create a Volunteer Opportunity webpage for public employees to view various opportunities to volunteer around the state (Philip)
- Revise the Volunteer Resources webpage to include helpful content, policy documents and easy-to-understand materials (Jerika and Philip)
- Revise training methods and materials to lower costs and present better information (Jerika and Philip)
- Create new ways of recognizing CFD volunteers throughout the state (Dawn and Jerika)
- Work to define clearer roles for CFD volunteers (Philip and Dawn)

GOAL #2

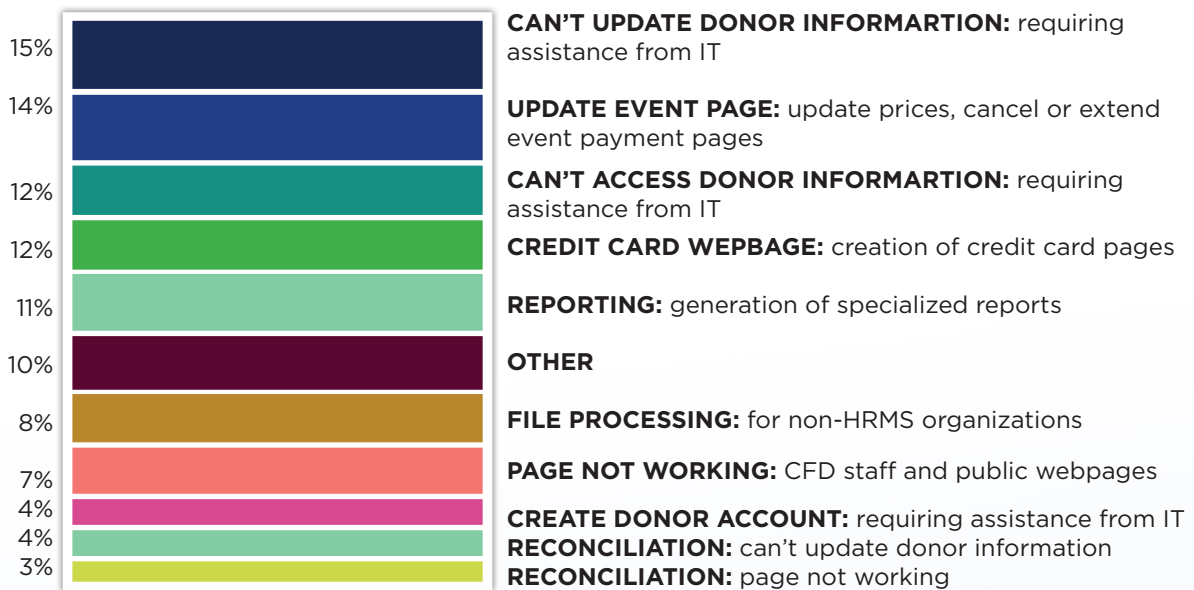
Review and revise web priorities, maximizing resources and making room for program expansion.

As IT and Web Services become less available, the CFD must become more self-sufficient, shifting workloads and allowing for more time to focus on high-priority webtasks.

Accomplishing this goal will not only provide a stable transition to a new system in the future, but give the CFD a chance to grow its current agency membership.

2018 submitted webtasks by category:

Below is a breakdown of all tasks that were submitted to the OSOS Web Services team and what those tasks entailed.



Tasks

This goal can be achieved through the following methods:

- Work with OSOS Web Services team to complete small projects that will lower webtasks (ALL)
- Create open lines of communication with OSOS Web Services team, establishing a sense of shared goals and shifting some day-to-day tasks to CFD staff: (Philip and Heather)
 - Allow CFD staff (with proper credentials) to access some sensitive information to make both the donor transfer and retiree processes more sustainable
 - Allow CFD staff to create and access reports themselves
 - Work with CFD staff to establish a method of creating credit card payment pages without IT assistance
 - Allow CFD staff to create accounts for retirees

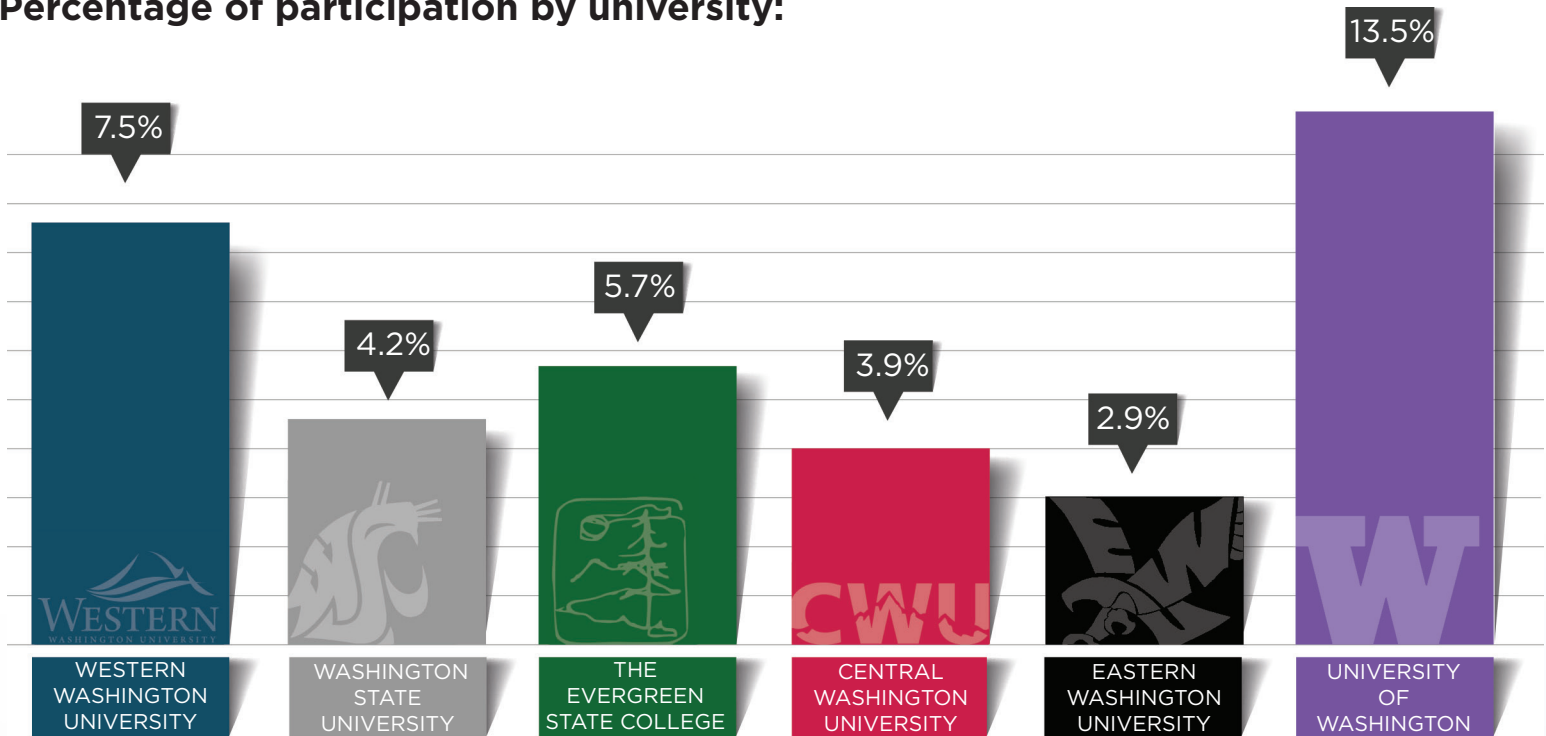
GOAL #3

Continue to cultivate relationships with volunteers and leaders at higher education institutions.

Higher education institutions continue to be an area of potential growth within the CFD.

In 2018, the CFD worked to develop best practices to cultivate the Annual Giving Campaign on college campuses. This year, the CFD will work to bring materials to campuses around the state.

Percentage of participation by university:



Tasks

This goal can be achieved through the following methods:

- Begin the process of communicating directly with HR and payroll departments within higher education institutions, providing clear information that will help ensure a smooth donation process for every donor (Heather and Jerika)
- Work with the Office of the Governor and Secretary of State to establish more effective methods of communication with college presidents (Philip, Dawn and Jerika)
- Work more directly with college volunteers and their teams (Dawn)
- Create exclusive web content for higher education volunteers (Philip and Jerika)
- Create higher education packets for each institution (Jerika)

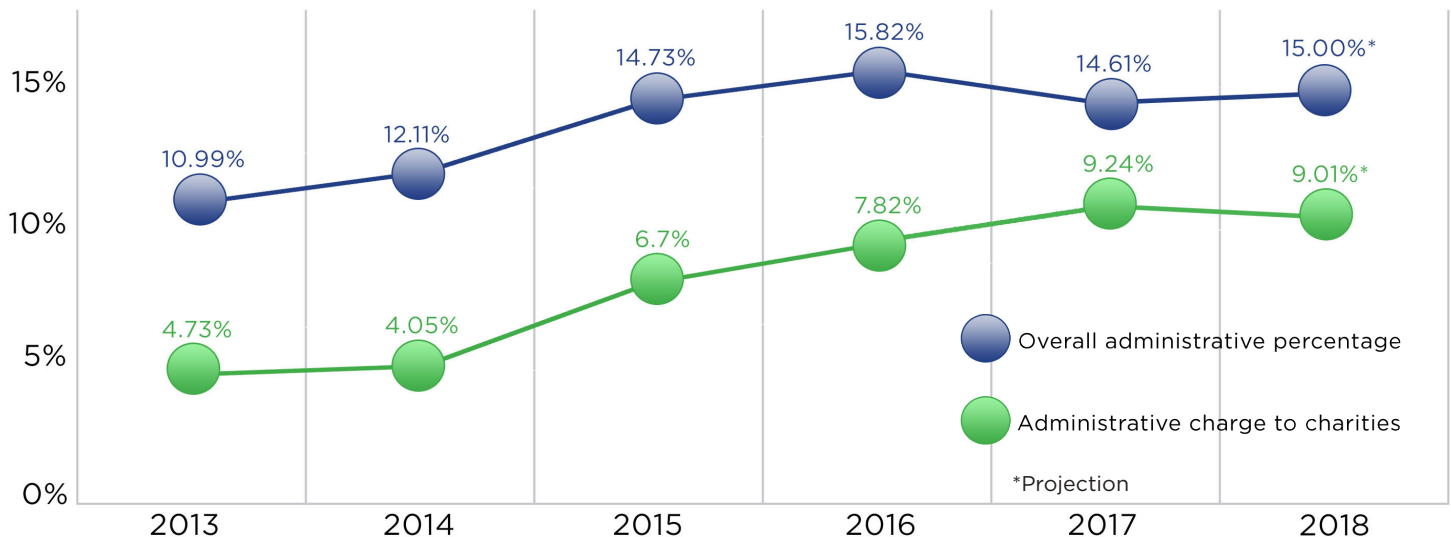
GOAL #4

Develop sustainable strategies that work to lower costs associated with operating the CFD, aiming to lower administrative charges to member charities below nine percent.

In order to keep administrative costs low for CFD member charities, the CFD partners with volunteers to conduct fundraising events and promotions to raise funds primarily for the CFD Non-Specified Fund.

To maximize funding raised at these events, the CFD will work to lower general operational costs and will seek to cultivate partnerships within the business community to lower costs for each promotion.

Administrative costs for the last five campaigns:



Tasks

This goal can be achieved through the following methods:

- Acquire new accounts to increase revenue for the CFD through growth strategies (ALL)
- Work with OSOS to help lower program costs (Philip)
- Utilize OSOS staff currently assigned to assist CFD more effectively (ALL)
- Increase sponsorships of CFD promotions to lower costs for each event (Jerika)
- Work to develop effective, low-cost events and promotions that help lower administrative charge to member charities (ALL)
- Work to educate OSOS management through quarterly status updates (Heather and Philip)
- Work as a team to lower costs in targeted areas (ALL)

2019 | ESSENTIALS

As the CFD enters its 35th Annual Giving Campaign, there are some essential items that will be consistent throughout the year.

ANNUAL CAMPAIGN DATES:

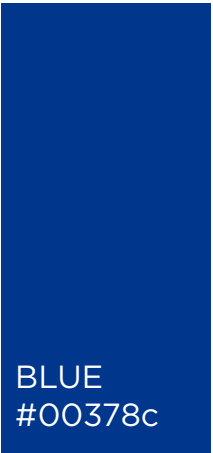


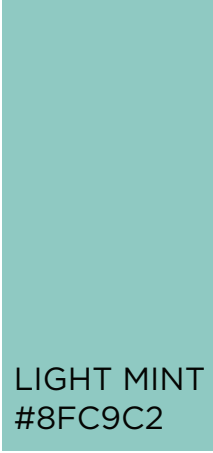
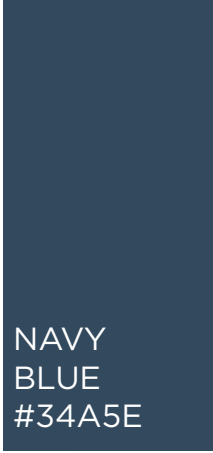


September 30 - December 6, 2019

ANNUAL CAMPAIGN THEME:

CFD Connects...

Choose to be Different

COLOR PALETTE:

						
BLUE #00378c	GREEN #41ad48	CORAL OF THE YEAR #ff776f	LIGHT MINT #8FC9C2	NAVY BLUE #34A5E	MOD GREEN #96BA00	MUSTARD YELLOW #590A32
MAIN COLORS			SECONDARY COLORS			

CFD LOGOS



WASHINGTON
STATE | CFD

CONTACT THE CFD:

Washington State Combined Fund Drive
PO Box 40250
Olympia, WA 98504

cfd@sos.wa.gov
(360) 902-4162
www.give.wa.gov

January 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1 NEW YEAR'S DAY	2	3	4	5
6	7	8  WASHINGTON STATE CFD	9	10	11	12
13	14 STEPHANIE BIRTHDAY	15  WASHINGTON STATE CFD	16 EMAIL TO ALL DONORS	17 EMAIL TO ALL CFD NON SPECIFIED DONORS	18	19
20	21 Martin Luther King Day	22  WASHINGTON STATE CFD	23	24 DAWN BIRTHDAY	25	26
27	28	29  WASHINGTON STATE CFD	30	31		

RED TEXT: REPORT OR DEADLINE

BLUE TEXT: EMAIL

GREEN TEXT: EVENT

MONTH LONG:

- Disbursement
- Legislative Session

PURCHASES:

- General office supplies

CONTRACTS:

- UWCFD contract payment
- DSHS contract payment

February 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2 Groundhog Day
3	4 EMAIL: VOLUNTEER SURVEY	5  WASHINGTON STATE CFD	6	7	8 ADVISORY COUNCIL	9
10	11 POSSIBLE PANOWICZ PROMOTION	12  WASHINGTON STATE CFD	13	14 VALENTINE'S DAY GRAM	15 ANNUAL REPORT	16
17	18 President's Day	19  WASHINGTON STATE CFD	20	21	22	23
24	25	26  WASHINGTON STATE CFD	27	28		

RED TEXT: REPORT OR DEADLINE

BLUE TEXT: EMAIL

GREEN TEXT: EVENT

MONTH LONG:

- Legislative Session

PURCHASES:

- Materials for all recognition events (trophies, certificates and holders)
- General office supplies

CONTRACTS:

- Finalize Twinstar sponsorship contract
- Finalize WSECU sponsorship contract
- Begin Leadership Breakfast venue contract process

March 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1 THURSTON COUNTY RECOGNITION EVENT	2
3	4 MARCH MADNESS*	5  POD CASTS FOR GOOD <small>WASHINGTON STATE CFD</small>	6	7	8	9
10 EASTER	11	12  POD CASTS FOR GOOD <small>WASHINGTON STATE CFD</small>	13	14	15	16
17	18	19  POD CASTS FOR GOOD <small>WASHINGTON STATE CFD</small>	20 SNO-KING COUNTY RECOGNITION EVENT	21	22	23
24	25	26  POD CASTS FOR GOOD <small>WASHINGTON STATE CFD</small>	27	28		

RED TEXT: REPORT OR DEADLINE

BLUE TEXT: EMAIL

GREEN TEXT: EVENT

MONTH LONG:

- Legislative Session
- Quarterly Executive Management meeting

PURCHASES:

- Materials for all recognition events (trophies, certificates and holders)





CONTRACTS:

- Begin UWCFD campaign contract process
- Begin DSHS campaign contract process

TRAVEL:

- Motor pool car for recognition events

April 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1 WELL FED WELL READ	2	3	4	5	6
7	8 WELL FED WELL READ	9  WASHINGTON STATE CFD	10	11	12	13
14	15 WELL FED WELL READ	16  WASHINGTON STATE CFD	17	18	19	20
EASTER 21	22	23  WASHINGTON STATE CFD	24 JERIKA BIRTHDAY	25 ERIN BIRTHDAY	26	27
28	29	30  WASHINGTON STATE CFD				

RED TEXT: REPORT OR DEADLINE

BLUE TEXT: EMAIL

GREEN TEXT: EVENT

MONTH LONG:

- Disbursement
- Legislative Session

PURCHASES:

- Promotional marketing materials for Annual Giving Campaign
- Materials for Leadership Breakfast
- Football tickets for online auction

CONTRACTS:

- UWCFD contract payment
- DSHS contract payment

May 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6 PSRW	7  WASHINGTON STATE CFD	8 PSRW OLYMPIA	9 LEADERSHIP BREAKFAST	10	11
12	13 SHIRT SALE*	14  WASHINGTON STATE CFD	15	16	17 ADVISORY COUNCIL	18
19	20	21  WASHINGTON STATE CFD	22 CAMPAIGN LEADER TRAINING (LNI)	23	24	25
26	27 MEMORIAL DAY	28  WASHINGTON STATE CFD	29	30 CAMPAIGN LEADER TRAINING (SPSCC)	31	

RED TEXT: REPORT OR DEADLINE

BLUE TEXT: EMAIL

GREEN TEXT: EVENT

MONTH LONG:

- Legislative Session

PURCHASES:

- Materials for PSRW booth
- Memorial Day event materials
- Campaign Leader Training materials (food, venue costs)
- General office supplies
- Food and venue for Leadership Breakfast (purchase order)

PRINTING BIDS

June 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4  <small>WASHINGTON STATE CFD</small>	5 CAMPAIGN LEADER TRAINING (OLYMPIA)	6	7	8
9	10	11  <small>WASHINGTON STATE CFD</small>	12 PHILIP BIRTHDAY	13	14	15
16	17	18  <small>WASHINGTON STATE CFD</small>	19 CAMPAIGN LEADER TRAINING (WEBINAR)	20	21	22
23	24	25  <small>WASHINGTON STATE CFD</small>	26	27	28	29

RED TEXT: REPORT OR DEADLINE

BLUE TEXT: EMAIL

GREEN TEXT: EVENT

MONTH LONG:

- Legislative Session

PURCHASES:

- Campaign Leader Training materials (food, venue costs)
- General office supplies

July 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4 INDEPENDENCE DAY	5	6
7	8	9  WASHINGTON STATE CFD	10	11	12 RAINIER'S BIRTHDAY*	13
14	15	16  WASHINGTON STATE CFD	17	18	19	20 TRIVIA NIGHT*
21	22	23  WASHINGTON STATE CFD	24	25	26	27
28	29	30  WASHINGTON STATE CFD	31			

RED TEXT: REPORT OR DEADLINE

BLUE TEXT: EMAIL

GREEN TEXT: EVENT

MONTH LONG:

- Grant Writing
- Disbursement

PURCHASES:

- General office supplies
- Mailing boxes and envelopes for CFD materials

CONTRACTS:

- UWCFD 2019-2020 contract start date
- DSHS 2019-2020 contract start date

August 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3 HOLD FOR DOC GOLF TOURNAMENT
4	5 SHIPPING	6  WASHINGTON STATE CFD	7	8	9 ADVISORY COUNCIL	10 HOLD FOR RUN CFD
11	12 SHIPPING	13  WASHINGTON STATE CFD	14 HEATHER BIRTHDAY	15	16	17 HOLD FOR ESD SOFTBALL TOURNEY
18	19 SHIPPING	20  WASHINGTON STATE CFD	21	22	23	24
25	26 SHIPPING FOOTBALL TICKET ONLINE AUCTION	27  WASHINGTON STATE CFD	28	29	30	31

RED TEXT: REPORT OR DEADLINE

BLUE TEXT: EMAIL

GREEN TEXT: EVENT

MONTH LONG:

- Local Coordinator Training
- Shipping

PURCHASES:

- Local Coordinator Training materials (food, venues)
- Green fees for DOC Golf Tournament
- Possible fees for CFD Softball Tournament
- General office supplies

CONTRACTS:

- Local Coordinator Training costs (motor pool, hotel, per diem)

September 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2 LABOR DAY	3	4	5	6	7
8	9	10  WASHINGTON STATE CFD	11	12	13	14 HOLD FOR GOLF FOR VETERANS
15	16	17  WASHINGTON STATE CFD	18 HEATHER BIRTHDAY	19	20	21
22	23	24  WASHINGTON STATE CFD	25	26	27	28
29	30	 WASHINGTON STATE CFD				

RED TEXT: REPORT OR DEADLINE

BLUE TEXT: EMAIL

GREEN TEXT: EVENT

MONTH LONG:

- Local Coordinator Training

PURCHASES:

- Local Coordinator Training materials (food, venues)
- Green fees for Golf for Veterans Tournament
- General office supplies

CONTRACTS:

- Local Coordinator Training costs (motor pool, hotel, per diem)

October 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30 FIRST WEEK TO GIVE	1	2	3 DOUBLE DAYS	4 EMAIL: FRIDAY FLIX	5
6	7	8  WASHINGTON STATE CFD	9	10	11 EMAIL: FRIDAY FLIX	12
13	14	15  WASHINGTON STATE CFD	16	17	18 EMAIL: FRIDAY FLIX	19 MASQUERADE BALL
20 HEATHER HIROTAKE BIRTHDAY	21	22  WASHINGTON STATE CFD	23	24	25 EMAIL: FRIDAY FLIX	26
27	28 FOOTBALL TICKET ONLINE AUCTION	29  WASHINGTON STATE CFD	30	31	EMAIL: FRIDAY FLIX	

RED TEXT: REPORT OR DEADLINE

BLUE TEXT: EMAIL

GREEN TEXT: EVENT

MONTH LONG:

- Disbursement
- Masquerade Ball preparations

PURCHASES:

- Masquerade Ball purchases
- General office supplies

CONTRACTS:

- UWCFD contract payment
- DSHS contract payment

November 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1 EMAIL: FRIDAY FLIX	2
3	4 OSOS DRESS DOWN DAYS	5  WASHINGTON STATE CFD	6	7	8 EMAIL: FRIDAY FLIX	9
10	11 VETERANS DAY	12  WASHINGTON STATE CFD	13 STUFF THE RUCK LOCATION SIGN-UP	14	15 EMAIL: FRIDAY FLIX	16
17 HEATHER HIROTAKA BIRTHDAY	18	19  WASHINGTON STATE CFD	20	21 APPLE CUP CHALLENGE 	22 EMAIL: FRIDAY FLIX	23
24	25 APPLE CUP CHALLENGE 	26  WASHINGTON STATE CFD	27 EMAIL: FRIDAY FLIX	28 THANKSGIVING DAY	29 BLACK FRIDAY	30

RED TEXT: REPORT OR DEADLINE

BLUE TEXT: EMAIL

GREEN TEXT: EVENT

MONTH LONG:

- Quarterly Executive Management meeting

PURCHASES:

- Possible items for OSOS CFD event
- General office supplies

December 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3 #GIVING TUESDAY	4	5	6 LAST DAY OF CAMPAIGN EMAIL: FRIDAY FLIX	7
8	9	10  WASHINGTON STATE CFD	11	12 STUFF THE RUCK	13 ADVISORY COUNCIL	14
15	16	17  WASHINGTON STATE CFD	18 CFD RETREAT	19 CFD RETREAT	20	21
22	23	24  WASHINGTON STATE CFD	25 CHRISTMAS	26	27	28
29	30	31  WASHINGTON STATE CFD				

RED TEXT: REPORT OR DEADLINE

BLUE TEXT: EMAIL

GREEN TEXT: EVENT

PURCHASES:

- Items for sponsor thank you baskets
- General office supplies

PRINTING:

- CFD Holiday cards