

WASHINGTON  
GIVES



*Five Year*

# STRATEGIC PLAN

SAN JUAN ISLANDS



WASHINGTON STATE  
**COMBINED**  
FUND DRIVE



WASHINGTON STATE CAPITOL  
OLYMPIA

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WSDOT FERRY  
SEATTLE



## ABOUT | THE CFD

The Combined Fund Drive is a trusted resource that inspires giving among public employees and retirees. The program was established in 1984 to consolidate the numerous charitable fundraising campaigns on state work sites.

The purpose of the Combined Fund Drive is to provide one avenue through which Washington State public and higher education employees can raise money for charities. Employees can give through payroll contribution and at agency fundraising events. The program 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 public employees and retirees nonprofits throughout our community to improve our world, state and local communities 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 and efficiencies that best serve the needs of employees, retirees, and the charities they support.
- We consistently improve our operations to increase accessibility and participation.
- We value and feel it critical to foster a partnership among the federations and charities, the CFD Advisory Council, the CFD staff, and state employees.

### Did you know...

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





## THE | CONTEXT

The CFD is entering a new phase of the program. For the past five years, the staff and its volunteers have worked tirelessly to improve essential pieces of the program, from the reconciliation module to the user interface on the website and beyond.

With this foundation in place, the CFD will dedicate the next five years to raising its profile--becoming a leader in the field of philanthropy and keeping pace with innovations that promise to benefit our stakeholders.

### **Environment**

The CFD is administered as a 170(c)1 state trust fund by the Office of Secretary of State (OSOS). As a result, the program operates under the fiscal standards and guidelines that all state agencies adhere to.

### **Resources**

The CFD is staffed by four full-time employees (FTE), and a part-time Community Programs Deputy Director. This provides some challenges to the level of service provided by the program and could impact the ability for the ability to implement goals outlined in this plan.

The program also uses the services of the OSOS Fiscal Department to help disburse funds to member charities, and relies on the agency's IT Web Development Team to assist with the program's donation management system and user interfaces.

### **Stakeholders**

Our donors view CFD as a trusted and convenient resource to assist them in charitable giving--while still protecting their identities. Our charities expect simple and timely reporting, as well as access to potential donors. These needs must be met while ensuring all state laws and agency policies are followed.

### **External Opportunities**

There are many avenues that the CFD has yet to explore that could help in achieving the goals set forth in this five-year strategic plan. Grants and matching funds, corporate sponsorships and even potential Loaned Executives are just a few external opportunities.

### **External Threats**

These program objectives do not account for unforeseen budget cuts or changes in statewide agency operations.

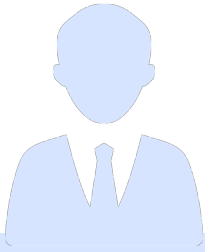




RELAY FOR LIFE  
OLYMPIA

# OUR | DONORS

Washington State law allows three different kinds of donors to participate in the Combined Fund Drive:



## Public Employees

More than 60,000 potential donors work within agencies across the state.

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



## Higher Education personnel

More than 42,000 donors across Washington may participate in the CFD. They may work in technical and community colleges or at four-year universities.

Donors can even give back to their own institutions through their foundations.



## Retirees

More than 100,000 retirees reside in Washington State and that number only continues to grow.

The CFD reaches these retirees through mailings, brochures and presence at events centered around state retired personnel.

## Stakeholder Needs

### Safety and Security

Our donors have come to expect that the CFD is one of the safest and most secure ways to give. To be effective, CFD must continue to maintain its reputation as a trusted resource in charitable giving.

### Easy donating

The CFD must keep pace with technology to ensure the security and convenience of charitable giving in the future.

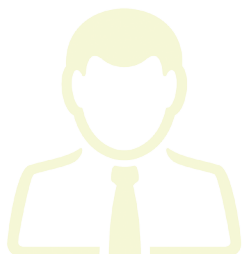
### Inspiration and Morale

The CFD helps boost morale, energize public employees and inspire them to give back. This momentum must continue to build to increase giving among state employees and retirees.

WINE NIGHT  
SPOKANE

## OUR VOLUNTEERS

The Combined Fund Drive would not be a successful program without the tireless efforts of its volunteers. There are numerous roles and responsibilities available to CFD volunteers:

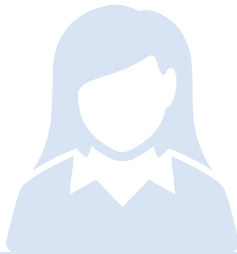


### Executive Leaders

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

#### Duties can 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, recruiting and providing support.

#### Duties can include:

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



### Local Coordinators

Local coordinators run campaigns at local offices.

#### Duties can include:

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

### Stakeholder needs

#### Tools and information to conduct successful campaigns

Each year, CFD volunteers expect comprehensive training and promotional materials that will help them conduct a successful and safe Annual Giving Campaign.

#### High energy CFD team with good customer service

The CFD staff is viewed as a high-energy and enthusiastic team that is always accessible. In a government environment, this has become essential to CFD operations.

#### Questions answered promptly

Our volunteers have many questions and expect them to be answered in a timely fashion.

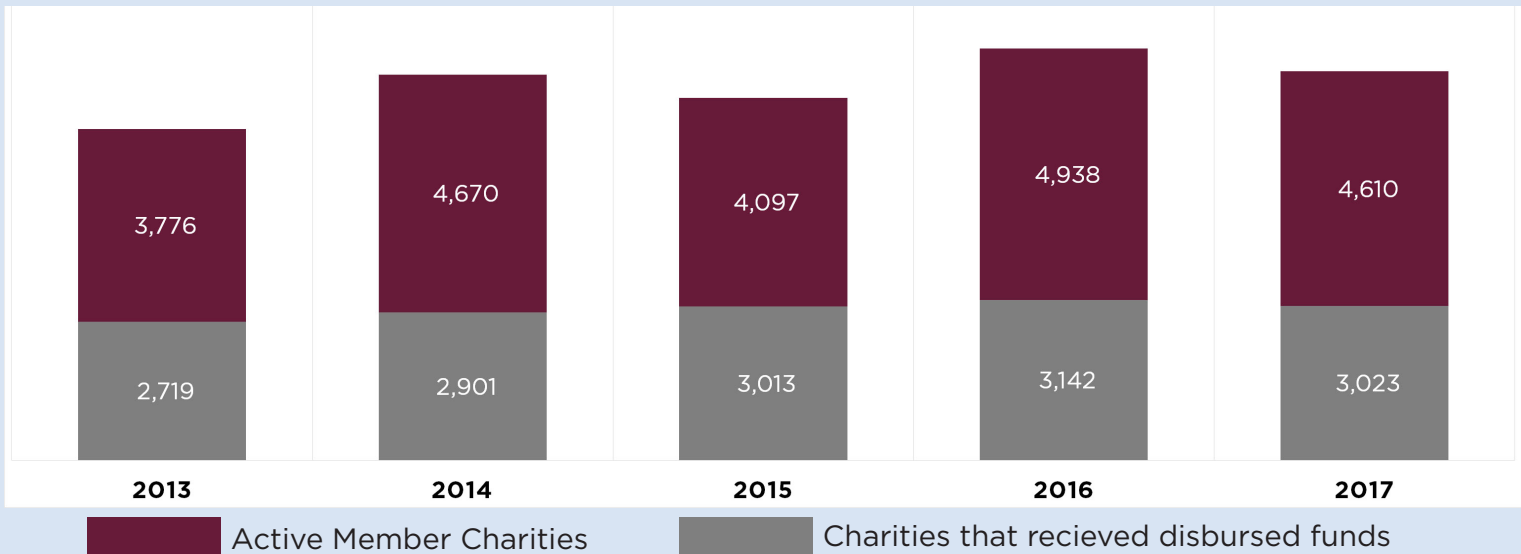
THE STAFF OF BLOODWORKS NORTHWEST  
SEATTLE

# OUR | CHARITIES

More than 4,500 local, national and global nonprofits actively participate in the CFD. The program disburses to more than 3,000 of these charities on a quarterly basis.

## Member Charity Information

Below is a graph of the number of CFD member charities year-over-year since 2013. Though the CFD has more than 4,000, not every active member has funds dedicated to their organization.



## Stakeholder Needs

### Accurate reporting

Over the last five years, the CFD has improved its reporting to member charities. This reporting can be enhanced ever further through monthly e-newsletters, charity symposiums on the program and other methods of communication.

### Timely Reconciliation and Disbursement of Funds

The CFD is viewed as a steady and sustainable source of revenue for many charities in the program. For some, the funding they receive from our program has become essential to covering program costs.

### Access to Potential Donors

In the last five years, the CFD has introduced numerous avenues for our charities to connect with potential donors. Moving forward, the program must continue to offer new avenues to communicate and connect with donors.





UNIVERSITY OF WASHINGTON WELCOME SIGN  
SEATTLE

## THE | PLAN

### Objectives

Within the next five years, the CFD will strive to achieve the following objectives:

#### GOAL #1

Be a recognized leader in the field of philanthropy.

#### GOAL #2

Maintain and modernize giving technologies for all CFD stakeholders.

#### GOAL #3

Maximize staff and resources while working to continually lower the administrative charge to participating charities.

### Key Indicators

These objectives will be measured by:

- Participation and engagement of prospective donors.
- Results of the Annual Giving Campaign.
- The number of volunteer hours logged using the CFD Volunteer Tracker.
- A decrease in administrative costs over the next five years.
- Total website traffic (page views, unique visitors, etc.).
- Number of active participating agencies and schools.

### Target Groups

The CFD will work with all stakeholders to accomplish these goals. In additions, the CFD will grow its partnerships with private partners and web development specialists.

### Strategic Approach

To accomplish these goals within five years, the staff will meet quarterly to review accomplishments throughout the year. An annual retreat will be conducted to review each Annual Giving Campaign and plan the upcoming year. The CFD will also meet quarterly with our Advisory Council to receive feedback on best practices and current initiatives.

ED HENDLER BRIDGE  
KENNEWICK, WA

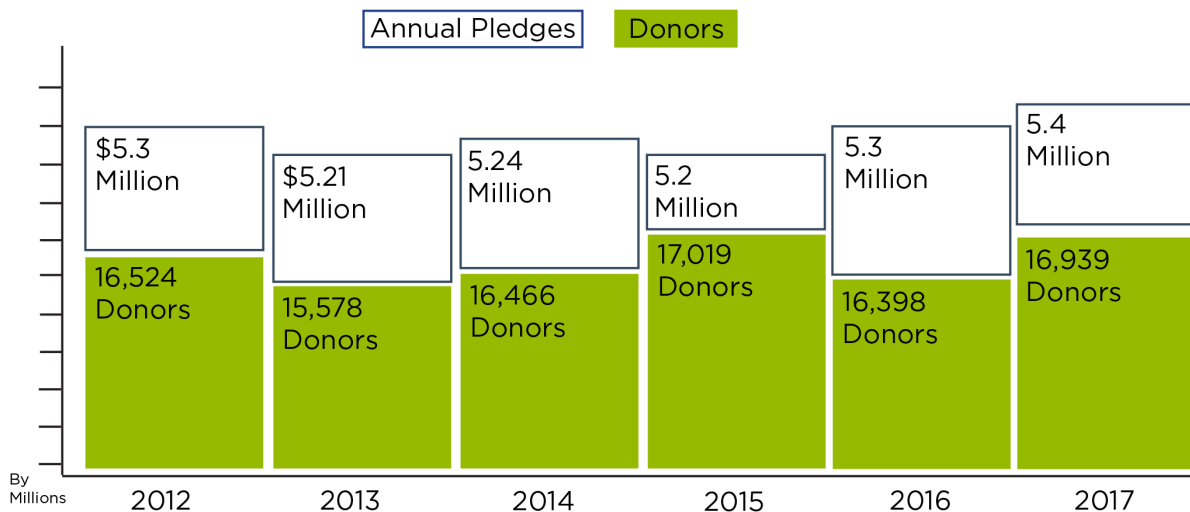
# GOAL #1

## Be a recognized leader in the field of philanthropy.

Over the past five years, the CFD has made improvements to the program that will allow it to emerge as a leader in the field of philanthropy. In order for this vision to become a reality, the CFD must work to innovate and adapt to emerging trends.

### Five-Year Pledge Data

Below is a graph that highlights the number of donors using payroll contribution to give through the CFD, as well as the total dollars pledged in each campaign for the previous five years.



### Strategies:

- Consider CFD eligibility requirements to allow more organizations to participate.
- Brand the CFD as the most reliable form of giving in our community.
- Establish better methods of communication with CFD stakeholders.
- Cultivate relationships with current higher education institutions to achieve higher participation.
- Become a premiere resource for charities.
- Accept non-state government agencies and institutions that show a desire to use the CFD as their method of payroll contribution.
- Work with local charities to create high-profile community events and promotions that benefit the program.

WILD HORSES MONUMENT  
VANTAGE, WA

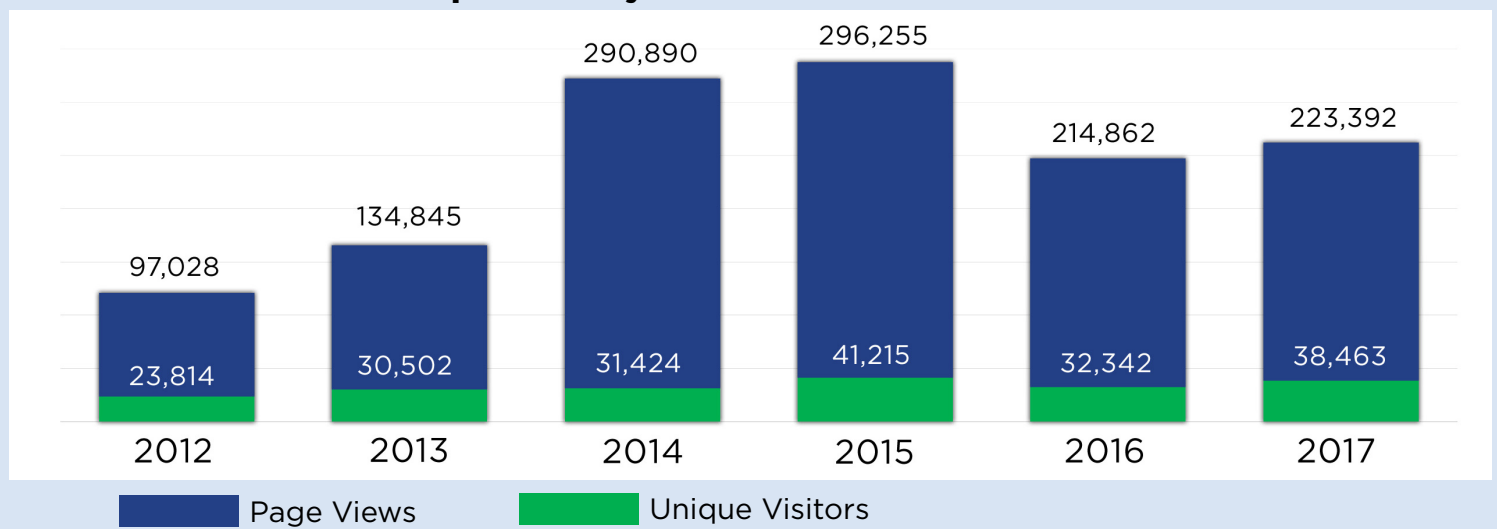
## GOAL #2

### Maintain and modernize giving technologies for all CFD stakeholders.

The CFD has built its reputation as an accessible resource with the help of technological innovation. The ability for a donor to make a charitable gift has never been easier, offering fewer clicks and hassle-free giving experience.

At the same time, the CFD has enhanced its web presence--offering donors online auctions, engaging video content and informative updates. As a result, web traffic has increased.

#### CFD Web Traffic in the past five years



#### Strategies:

- Partner with innovative organizations at reasonable cost to further the CFD mission and ease CFD administrative tasks.
- Update the CFD charity application, bringing in more data and providing more info to our donors.
- Create a Volunteer Match web application, providing a new way of interacting with the CFD.
- Refine the CFD search engine to account for more focused searches.
- Provide all CFD staff with updated creative and functional software.
- Pursue the possibility of adopting a new online donation management system, cutting down on confusion and possible errors.





PALOUSE FALLS  
LACROSSE, WA

## GOAL | #3

### Maximize staff and resources while working to continually lower the administrative charge to participating charities.

Accomplishing the goals set forth in this plan will require additional resources. These resources range from a potential new online database to new staff member that can help with project management and event coordination.

Currently, the program has four full-time positions and pays half the salary of the Community Programs Deputy Director.

#### Current CFD program staff positions

Below is a listing of the current staffed positions within the CFD and a brief job description for each.

##### COMMUNITY PROGRAMS DEPUTY DIRECTOR

Responsible for overseeing Community Programs, the division that houses the CFD.

##### PROGRAM MANAGER

In charge of the day-to-day operations of the CFD, including budget and campaign planning.

##### FISCAL AND POLICY COORDINATOR


Works on all issues related to reconciliation of funds and program policy changes


##### MARKETING AND DEVELOPMENT DIRECTOR

Designs all promotional material related to the CFD and plans communications for the campaign.

##### RESOURCE COORDINATOR

Tackles general questions and concerns from donors, charities and volunteers.

 Part-Time Position

 Full-Time Position

#### Maximize staff and resources:

The CFD plans to better prioritize resources, innovate and add personnel to meet future demands and achieve goals.

- Explore a shared FTE for the Community Programs Division.
- Work with OSOS to reduce administrative cost and free up funding for additional personnel.
- Work to acquire possible FTE to assist with development and event planning.
- Develop materials that educate donors on the costs of running the Combined Fund Drive
- Review the program budget and expenses to find areas for fiscal improvement
- Develop events and promotions that help bolster the CFD non-specified fund and deflect costs to charities

# FIVE-YEAR STRATEGIC PLAN

MOUNT BAKER  
NORTH CASCADES

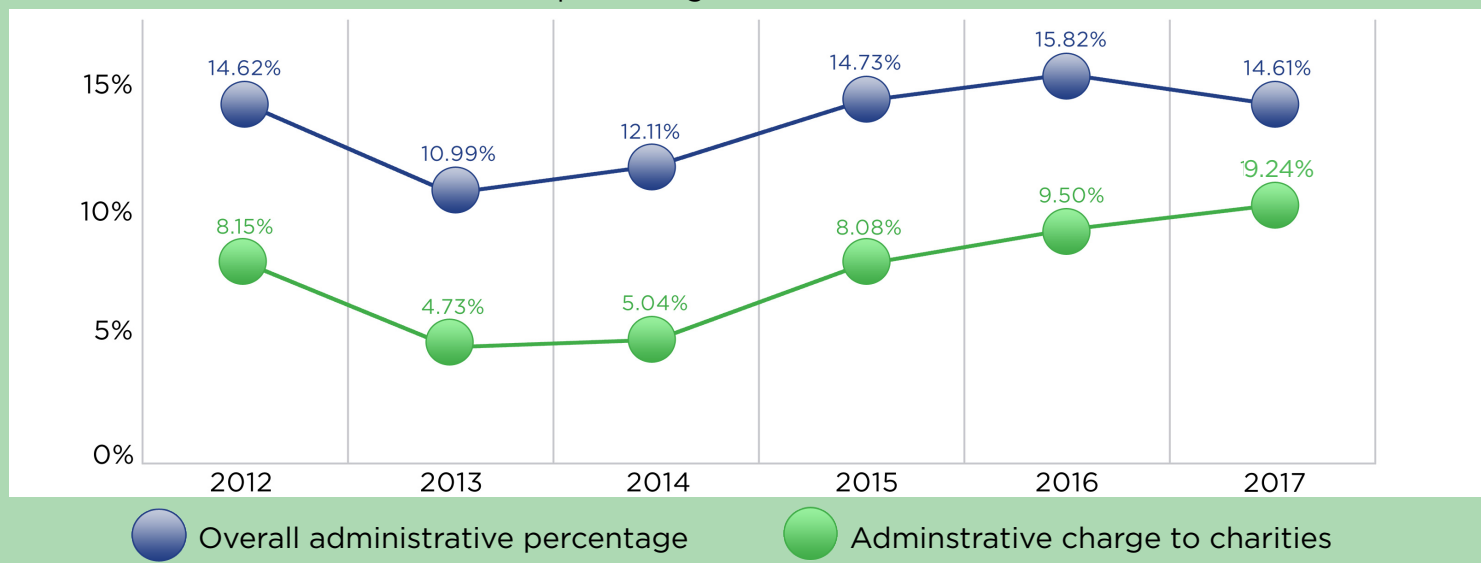
The program is not publicly funded through general tax dollars, so any significant additions to CFD staff would affect the administrative cost the program currently charges its member charities.

Currently, about half of the costs incurred by running the program are covered through the Non-Specified Fund, an account that operates solely to assist with paying for administrative costs. This Fund has allowed the CFD to remain competitive in the philanthropic community.

It is extremely important to the success of the CFD that the administrative costs associated with running the program remain at 10% or below. This will ensure that the program remains a relevant option for potential donors.

## Five-Year Administrative Cost Data

Below is a chart of the administrative percentage for the CFD since 2012.



## Lower administrative charge to charities to 5 percent:

In order to lower costs associated with running the program, the CFD plans to use the following strategies:

- Acquire corporate sponsorships that help diminish overall campaign costs.
- Work to find matching funds and grants from public and private organizations to help cover administrative costs for current and future CFD projects and personnel.
- Work with the Office of Secretary of State to further subsize certain CFD costs.
- Create additional high profile events, focusing on areas outside of Thurston County.
- Get larger events like the Masquerade Ball, Leadership Breakfast, Football Ticket Online Auction 100 percent sponsored and paid for by private business partners.

## CONTACT THE CFD

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