

2023



Campaign Leader Guide



WASHINGTON STATE
COMBINED
FUND DRIVE

CAMPAIGN LEADER

RESPONSIBILITIES

Campaign Leaders are a vital part of the Combined Fund Drive(CFD) campaign. As a Campaign Leader, you have the chance to make a personal connection, have fun and boost co-workers morale, as well as make a positive difference in our communities.

Responsibilities include, but are not limited to:



Working with People

- Recruit agency volunteers (Local Coordinators) to support your agency's CFD efforts
- Oversee agency-wide campaign
- Work with volunteers to hold fun events
- Recognize volunteers who help with the campaign

Planning

- Attend CFD training (June)
- Ensure your Local Coordinators receive CFD training (August - September)
- Develop and implement a giving campaign plan that fits the culture of your workplace
- Become familiar with the CFD's online tools
- Order campaign supplies through the CFD website
- Set and meet deadlines



Communication

- Develop a communication plan (i.e. e-mails, posters, calendar invites to fundraising events, etc.)
- Share CFD promotions and marketing materials
- Answer CFD-related questions from employees and volunteers
- Work with your CFD Executive Sponsor to get management help and support
- Ask charities to speak at staff meetings or CFD events



Administrative Duties

- Enter and log agency fundraisers
- Follow cash handling policies to deposit fundraising dollars
- Manage, collect, and process any related reporting to/from Local Coordinators
- Distribute final results to your Executive Leader and Local Coordinators and co-workers
- Review/analyze your campaign performance and results
- Summarize final information so it can be readily available for the next year's campaign

*Tip: You don't have to lead alone. Ask management to appoint a Co-Campaign Leader!



WASHINGTON STATE
COMBINED
FUND DRIVE

CONTRIBUTION FORM

Thank you for giving to your charity of choice through the Washington State Combined Fund Drive! Please fill out the form below to begin giving through payroll contribution or personal check today.

Please print clearly.

New Donor Change My Current Donation(s) Add To My Current Donation(s) Cancel My Donation(s)

Name (Last, First, MI) _____ Employee ID # _____

Agency/Campus _____ Email _____ Work Phone _____

Fill in your donation information. Please make donations by check payable to the Combined Fund Drive and staple the check to this form. Paper clip cash donations. Cash and checks will be processed as soon as the CFD state office receives your Contribution Form.

New or updated payroll deductions will be processed at the first possible pay period unless otherwise instructed. If you are making a donation you wish to stop on a specific date, please indicate the date below. Monthly donations do not automatically end.

Charity Name	Charity Code	Monthly Payroll Donation	One-Time Payroll Donation	Cash or Check Donation
CFD Non-Specified Fund	0316854	\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$

Please Sign and Date:

X _____ Date _____
Your signature is required to process your donation.

I wish to donate anonymously

By signing this form, I understand that once started, my monthly payroll deduction will continue automatically each pay period and roll over into the new year and into my retirement unless changed (by either updating my donation account online at www.give.wa.gov, cancelled by checking the cancel box above or by written notice to the CFD office). In signing this form, I acknowledge that my donation(s) will be updated per the guidelines and information I provided above. I hereby authorize the State of Washington to deduct the amount indicated from my pay provided that the amount deducted will be remitted on a regular basis in support of the charities of the Washington State Combined Fund Drive as specified above.

Please sign and return this form
to the CFD state office at:
PO Box 40250, Olympia, WA 98504 (Mail Stop #40250)

COLLECTING PLEDGE FORMS

- A** Payroll contribution may be accepted at a fundraiser. All pledge forms must be completely filled out, and signed by the donor. Pledge forms are for: Monthly, One-Time, and Cash or Check Donations
- B** Once collected, send directly to the CFD state office.
- C** Collection of pledge forms at fundraisers, must be supervised and secured by a volunteer.
- D** Payroll contribution forms are not counted as income to be transferred or entered as fundraisers online.

BEST PRACTICES CASH & CHECKS

- A** All checks and money orders must be made out to the Combined Fund Drive. If they are not, they must be returned to the donor for correction.
- B** If the donor wants their cash or check donation associated with their name, the donor must fully complete a pledge form and attach the cash and check.
- C** Paper clip the cash or staple the check to the pledge form.
- D** Collection of cash and checks must be supervised by a volunteer. Secure cash and checks for any fundraiser in a locking cash box, or bag, and transport them to your fiscal office within 24 hours.
- E** Two volunteers must count all cash collected together.

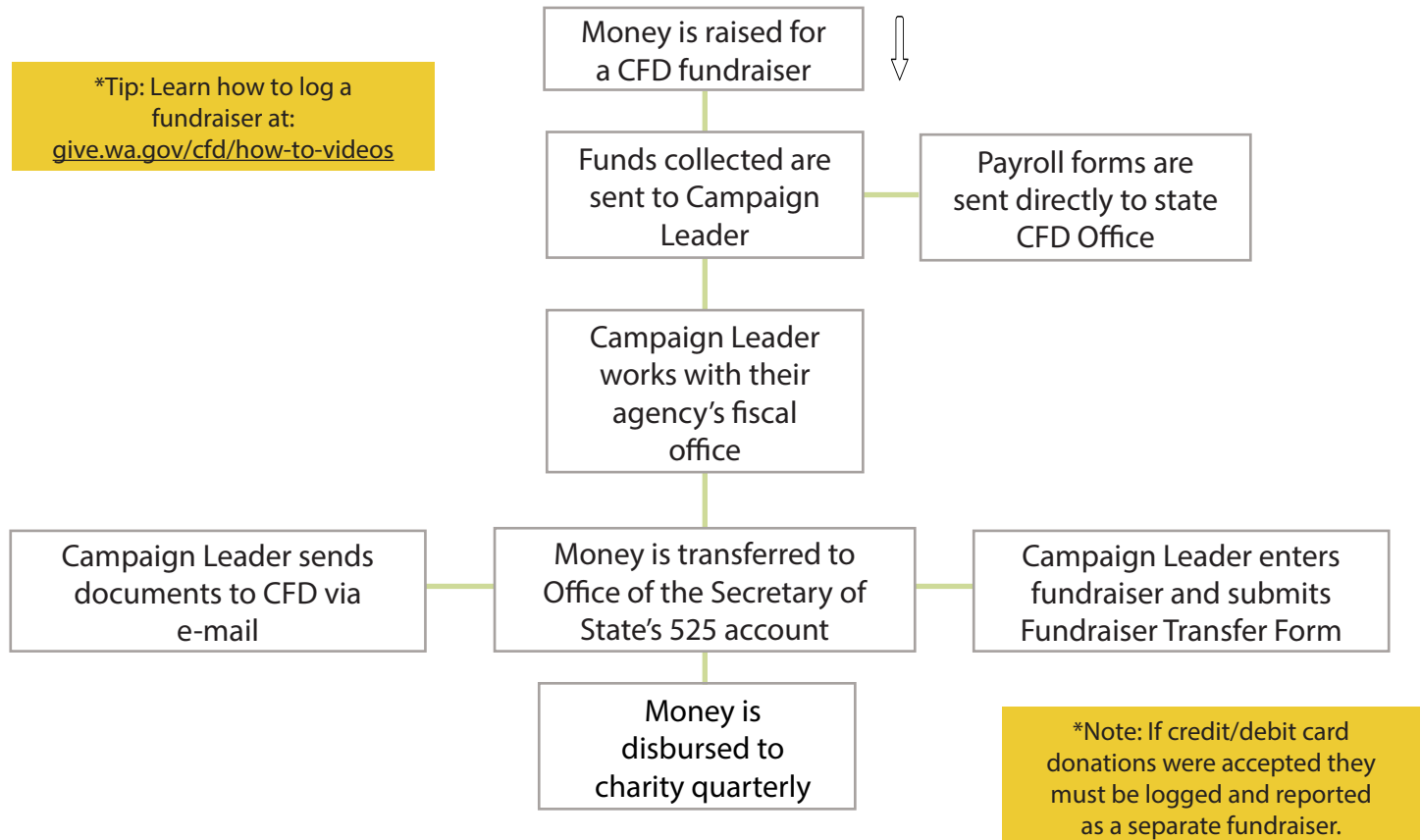
*Tip: A fiscal department employee is a great volunteer for cash handling!

How to Count Cash:

- 1** Volunteer 1 counts the funds, documents the total and initials the total while Volunteer 2 watches.
- 2** When Volunteer 1 is finished, Volunteer 2 counts the funds, documents the total and initials the total while Volunteer 1 watches.
- 3** If both totals match, secure funds in the locking cash box and transport them to your fiscal office within 24 hours.
- 4** If the funds don't match, both volunteers need to recount all funds by repeating the process.

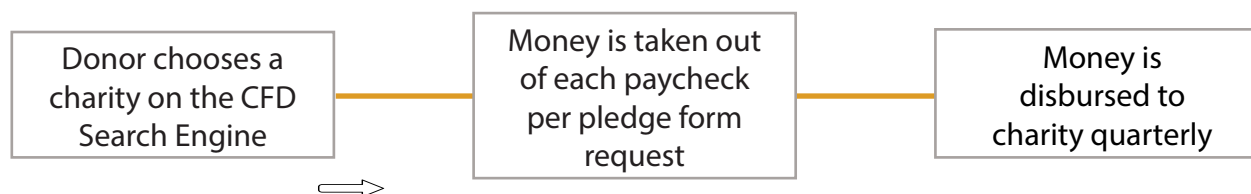
AGENCY FUNDRAISERS

The following chart illustrates how the process works for Campaign Leaders working with Local Coordinators and their respective fiscal agents. You must transfer fundraisers before the end of each quarter (March 31, June 30, September 30, December 31).



PAYROLL CONTRIBUTION

The best ways for employees to connect with their favorite cause is through a sustainable and safe gift of payroll contributions.



CAMPAIGN CALENDAR



JUNE – JULY

- Campaign Leader Recruitment
- Campaign Leaders recruit CFD Local Coordinators around the state from your agency
- Encourage CFD Local Coordinators to attend CFD training

AUGUST

- Campaign Leader Training
- Encourage your CFD Local Coordinators to attend CFD training
- Order CFD annual giving materials for yourself and/or your Local Coordinators from the CFD state office
- First round of the CFD Online Sports Auction begins



SEPTEMBER – NOVEMBER

- CFD Annual Giving Campaign Begins
- First Week to Give promotion (WSECU)
- Agency results are posted to the CFD website

DECEMBER

- Transfer all fundraiser dollars to the CFD office and OSOS Financial Services by December 9, 2022. Transferring after this date may result in disbursement in April 2023.
- Nominate your volunteers and leaders for county and state awards



FEBRUARY – APRIL

- If available, attend a recognition event in your area

YOUR STAKEHOLDERS

Being a CFD Campaign Leader, you need the support of your agency's leadership and the ability to work with your Local Coordinator team.

EXECUTIVE SPONSOR

Executive Sponsors are chosen by your agency's director/president. They help you gain support from executive management, spread internal communication about your CFD efforts, and give agency guidance to local supervisors about the CFD.

Their duties may include:

- Sending e-mails of support
- Assisting in Local Coordinator volunteer recruiting efforts around the state
- Acting as a liaison with management
- Communicate with all management levels regarding your role as a Campaign Leader
- Showing support for the CFD effort
- Ask the agency's director/president to support training volunteers, planning, educating employees about the CFD
- Ask about an agency's CFD budget; Agencies may have money allocated
- See if the director/president and managers may agree to do something special, silly, funny, etc., to motivate employees as a celebration when your agency or department meets/exceeds campaign goals

LOCAL COORDINATORS

This is your CFD team. Communicate CFD opportunities like promotions, trainings, and what your own agency CFD campaign is doing. Local Coordinators are employees in your agency/institution who will be there to support you with the campaign.

Their duties may include:

- Planning fun events
- Building local teams
- Promoting charitable giving
- Reporting results to the agency's CFD Campaign Leader (You!)

LOCAL AGENCY MANAGERS AND SUPERVISORS

It is important that local agency managers and supervisors understand that the CFD is part of state business and show support.

Their duties may include:

- Support planning of the event
- Speak at the local coordinator's event
- Inform employees they can participate by attending CFD events and give through payroll during work hours.

*Tip: You are not alone, your team, both Local Coordinators and Executive Management is there to help in your efforts!

RECRUITMENT

5 WEEK PLAN

WEEK 1:

- Log into your Campaign Leader account and download the Agency Volunteer Report spreadsheet for your agency
- Ask your Agency Director or Executive Sponsor to send out a recruiting e-mail to ALL agency employees

WEEK 2:

- Send an e-mail to the volunteers identified on the Agency Volunteer Report asking if they will be returning to the Annual Giving Campaign
- Gauge the progress of new and returning volunteers by adding them to your spreadsheet

WEEK 3:

- Ask your management team to send out a recruitment e-mail to the volunteers who have not responded, as well another e-mail to your agency
- Gauge the progress of new and returning volunteers by adding them to your spreadsheet

WEEK 4:

- Repeat the steps from Week 2
- If you've already confirmed all of your volunteers, skip to Week 5

WEEK 5: COMPLETE BY JULY 31, 2022

- Enter your confirmed volunteers into the CFD system
- For all of the volunteers who have not returned your e-mails, assume they are volunteering for the campaign this year

WHO TO RECRUIT

Local Coordinators on your team should be enthusiastic, positive, well-respected and are comfortable asking employees to get involved.

- Recruit a diverse range of employees (detail-oriented, good with numbers, the energetic cheerleader, already volunteers for a charities, and task-oriented, event planning experience)
- Try to recruit one to three Local Coordinator for each office
- Make sure your agency management and volunteers know that CFD is part of state business
- Promote the benefits of being a Local Coordinator

*Note: This is a great program to learn about management - it can look great on a resume!

QUALIFYING CHARITIES

To become a CFD Member Charity, a charity must have both of the following:



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



Be registered as a charity with the Charities Program at the Office of the Secretary of State.

CFD ETHICS

Fundraising for charities in the office can lead to questions about the ethics involved with administering your CFD giving 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.

Below are some examples:

- Use your office printer to print off flyers or CFD meeting agendas
- Schedule meetings about possible fundraisers
- Conduct fundraisers during work hours
- Use the CFD website to donate and find resources

CAN I SOLICIT BUSINESSES FOR IN-KIND DONATION?

This is a trickier question. The WACs that govern our program allow CFD volunteers to solicit local businesses and organizations for in-kind donations in Washington State, 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 make sure to do the following:

- Approach businesses during your off-time or lunch breaks (no paid hours)
- Clearly identify the nonprofit organization for which you are raising the money (either the CFD or an active CFD member charity)
- 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.

*Note: Internal state agency policies regarding in-kind donation solicitation supersede the CFD state office policies. Contact your agency ethics officer for clarification.

INFORMATION ON GAMBLING

*Note: Washington State employees are prohibited from gambling 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. Examples:

- 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. Records must be kept for one year after a raffle is held.

- 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 (tickets must be of equal value, no price break)

EXAMPLES:

- **Door Prize:** You are holding an event where you hand out door prize tickets. The event has a suggested donation of \$10. Regardless of suggested donation, every individual that comes through the door must receive a door prize ticket. The door prize winner is chosen at random by a drawing. It is chance that an individual wins. The winner receives a prize. Since you have eliminated consideration by giving everyone a door prize ticket, this is no longer 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, this is no longer gambling.
- **Ring Toss Game:** Each guest must buy entry to participate; Skill determines winner; Each winner receives a prize. CHANCE is removed, this is not gambling.
- **Bingo:** Each player buys a bingo card to play; Chance determines winner; The winner receives a prize. CONSIDERATION, CHANCE and PRIZE exist, this is gambling.

CAN I HAVE AN AUCTION?

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

- **Silent Auction:** Track the bids with a bid sheet. Each item needs a bid sheet that includes total value of the item(s) present.
- **Live Auction:** Label each item with a number and description. Hand out bid numbers. Have your team watch the crowd and help the volunteer recording bids.

FUNDRAISER IDEAS

Here are some fundraising activities and promotional ideas for you and your team to consider for your own agency fundraiser:

- Snack Cart
- In-Kind Donation Drives: Clothing/ Blanket/Shoe/Food Drives
- Coin Jar Collection and Contests
- Chili/Cake/Cookie/Pie/Cook Offs/Bake Offs
- Dining for Dollars
- Brown Bag/Meeting Presentations
- Pizza/Spaghetti/Taco/ Breakfast/ Luncheon/Baked Potato Feed
- Holiday or Themed Potlucks
- Cat Cafe
- Blog or Intranet Info Page
- IT Pop-Up Shop
- Charity Tour
- Putt Putt Golf Tournament
- Carnival
- Wreath and Swag Sale
- Trivia Contest
- Photo Contest
- Tabling/Bulletin Boards/Posters in Common Spaces
- Silent or Live Auction
- Media Sale (Books/CDs/Movies)

Planning and executing a fundraising event can be hard work. Here are some things to think about when attempting to make a fun and inspiring gathering:

Describe the type of fundraiser are you holding?

Who is your target audience? Who is able to come? What message do you want them to walk away with?

When are you holding your event? Is it a good time for your audience?

Where is your event being held? Are there usage fees?

What is your end goal for the event? What does success look like?

GET IN CONTACT

Do you have questions about the Combined Fund Drive? Do you want to run fundraiser ideas past state CFD staff? Contact us anytime!

Hours: Monday - Friday | 8:00 AM - 5:00 PM

E-MAIL ADDRESS

E-mailing the CFD is the best way to keep in touch and ask questions. Contacting us via email provides a record you can refer to for future use.

cfd@sos.wa.gov

PHONE NUMBER

Do you know any retirees looking to donate? Have them give us a call! Need help logging your fundraisers? Give the CFD call!

(360) 902-4162

MAILING ADDRESS

Send your pledge forms, and any fundraising checks to the CFD at this address:

Combined Fund Drive
PO BOX 40250
Olympia, WA
98504-0250