



2023

# CAMPAIGN LEADER TRAINING

# MEET OUR TEAM



# Introductions

- Name, Pronouns
- Agency
- Number of Campaigns



# AGENDA

- CFD Basics
- How the Campaign Works
- Roundtable Discussion: Fundraising Ideas
- Fundraising: Necessary Practices
- Online Presentation



Who?



What?

# CFD BASICS

When?

Why?

Where?

# FACTS AND FIGURES

- Raised \$164 million since 1984
- \$4.2 million pledged in 2022
- Over 4,700+ member charities
- One of the top five state giving programs across the nation
- More than 1,100 volunteers across the state

# WAYS TO GIVE



**MONETARILY**



**VOLUNTEERISM**



**GOODS**



# WAYS TO GIVE

## MONETARILY



**CASH**



**CHECKS**



**CREDIT CARD**



**PAYROLL**

# WAYS TO GIVE

## VOLUNTEER TRACKER

- **SEARCH**

Find a charity through the CFD search engine. You can look by their organization's name, a keyword, their CFD Charity Number, or through other variables.

Then click "Log your volunteer hours with this charity"



# WAYS TO GIVE

## GOODS

- Fill out our food and goods tracker:

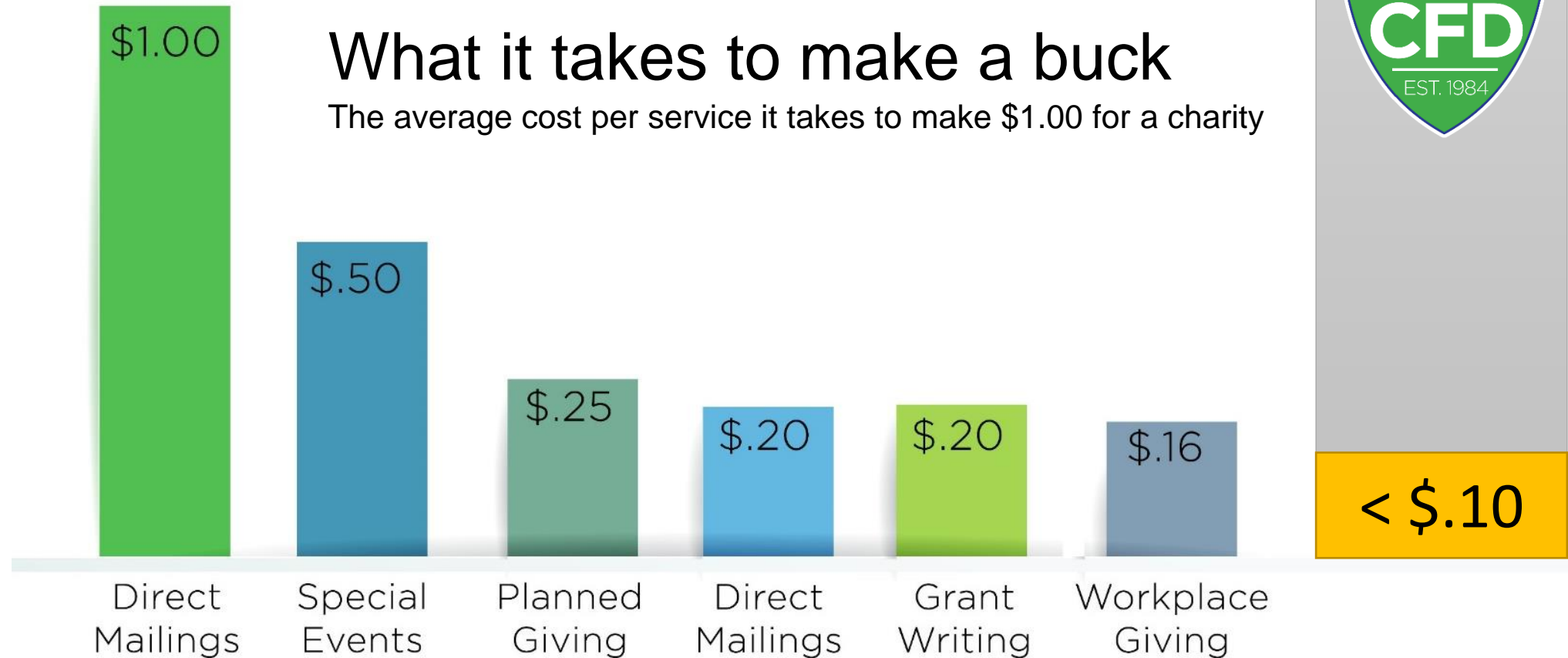


# BENEFITS

## FOR CHARITIES

- It's FREE to join!
- Reduces administrative cost
- Pledges help charities plan their budgets for the year to come
- Access to thousands of potential donors

# BENEFITS FOR CHARITIES



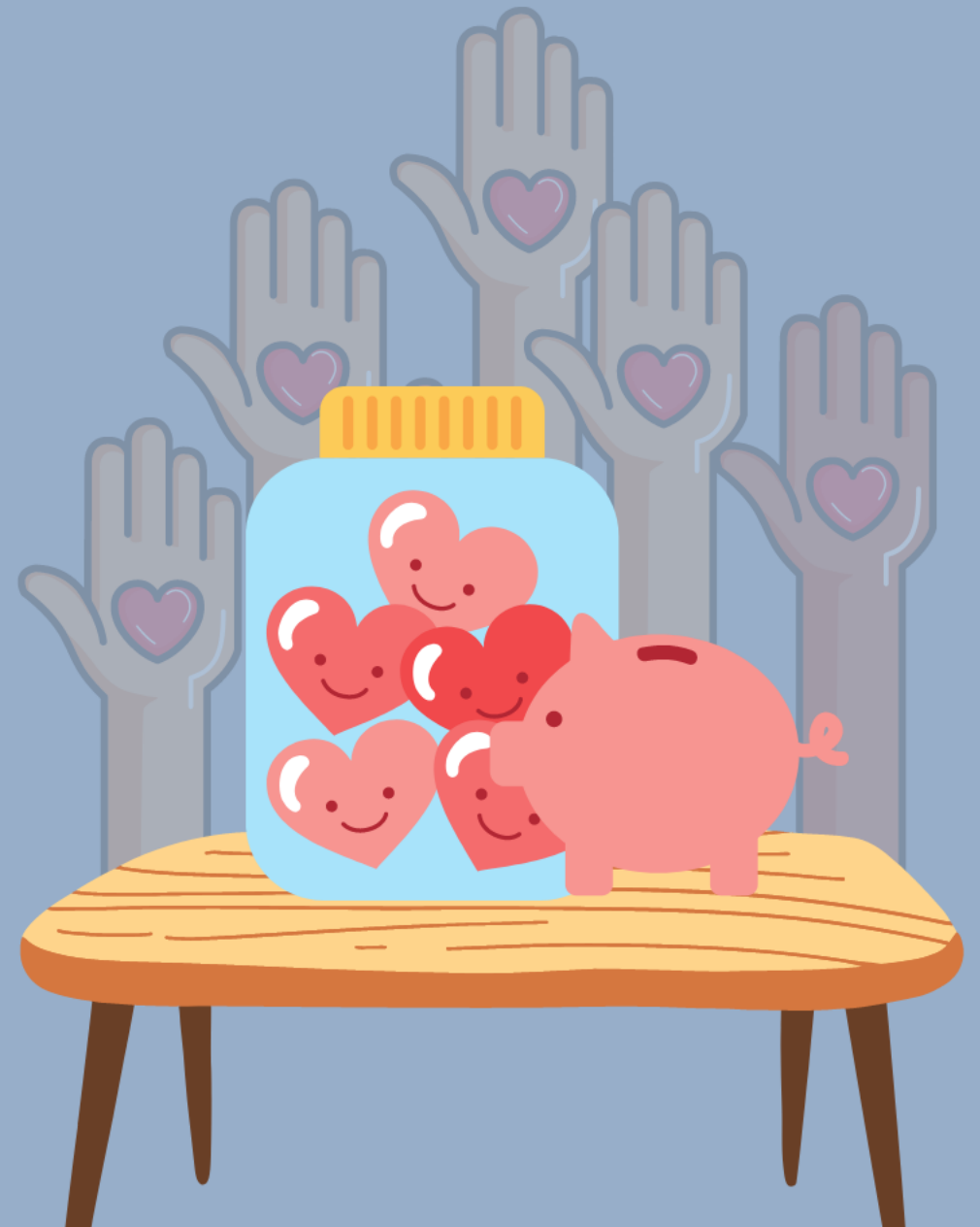
# BENEFITS

## FOR DONORS

- It's easy
- It's safe
- It's your choice
- It's Pre-tax
- Anonymity



# How the Campaign Works



# OUR VOLUNTEERS

## ROLES



### EXECUTIVE SPONSORS

This leader is chosen by your agency director. They help you gain support from executive management.

**Duties may include:**

- Sending e-mails of support
- Assisting in volunteer recruiting efforts
- Acting as a liaison with management
- Communicating with front-line supervisors



### CAMPAIGN LEADERS

Act as the agency-wide CFD lead by recruiting, logging fundraisers and providing support to Local Coordinators.

**Duties may include:**

- Recruiting Local Coordinators
- Logging fundraisers
- Ordering CFD supplies
- Building a theme (agency-wide or CFD's theme)
- Communicate with Local Coordinators



### LOCAL COORDINATORS

Volunteers that you recruit for your agency's offices around the state.

**Duties may include:**

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



# OUR VOLUNTEERS

## YOUR ROLE

- Recruit
- Educate
- Communicate
- Set an agency wide goal
- Make the Ask
- **Log the fundraisers**



# OUR VOLUNTEERS

## WHO TO RECRUIT

Try to find agency volunteers that are...

- Outgoing
- Detail oriented
- Creative
- Charitable
- Reliable

Success in building your own team...

- Variety is the key
- Find a balance
- Key influencers



# OUR VOLUNTEERS

## WAYS TO COMMUNICATE AND PROMOTE

- Email templates
- Social media images and blurbs
- Post our flyers
- Include State CFD information in interagency communications
- Ask executive sponsor to support through email or any other media content
- Be present at your agency celebration
- Invite charity speakers at your agency meetings
- Add donor and volunteer stories in weekly newsletter or emails

BE THE DIFFERENCE! Join the Washington State Combined Fund Drive (CFD) in giving more than \$4 million annually to charities across the state and globe.



**23** AND **BE**



WASHINGTON STATE  
**COMBINED**  
FUND DRIVE

Visit our website:  
[give.wa.gov](http://give.wa.gov)

# 2023 CAMPAIGN THEME

# SUPPLY LIST



- PDF Posters
- Thank You Card Template
- Virtual Contribution Forms
- Virtual Charity Guide
- Optional – Swag sent to offices

# DISBURSEMENT

## HOW IT WORKS

- A state employee adds donation/pledge online or submits a paper contribution form.
- The CFD system receives funds about 3 days after payroll is processed.
- The CFD team balances the donations monthly
- Donations are disbursed to charities quarterly.

### DISBURSEMENT QUARTERS

1QTR – January-March

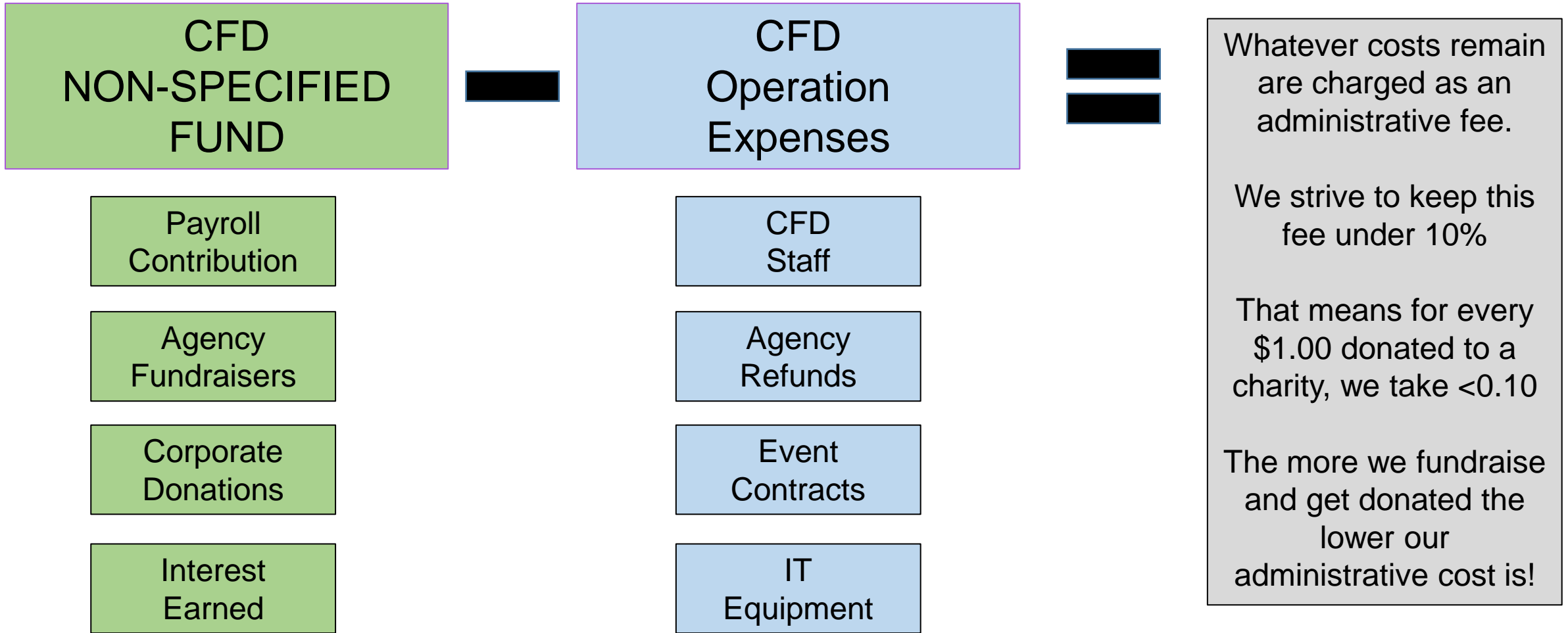
2QTR – April-June

3QTR – July-September

4QTR – October-December



# ADMINISTRATIVE COSTS



# ETHICS AND THE CFD

## SOLICITING BUSINESSES FOR IN-KIND DONATIONS

- CFD volunteers are allowed to solicit for in-kind donations
  - Employees at regulatory agencies may not be allowed to solicit
  - **Please always check with your Agency Leadership/ Human Resources if you are unsure**
- Solicitation letters are available by request only: contact [cfd@sos.wa.gov](mailto:cfd@sos.wa.gov) for a letter
- If you're unable to solicit for in-kind donations, contact the CFD at (360) 902-4162 or [cfd@sos.wa.gov](mailto:cfd@sos.wa.gov) for assistance



# ETHICS AND THE CFD

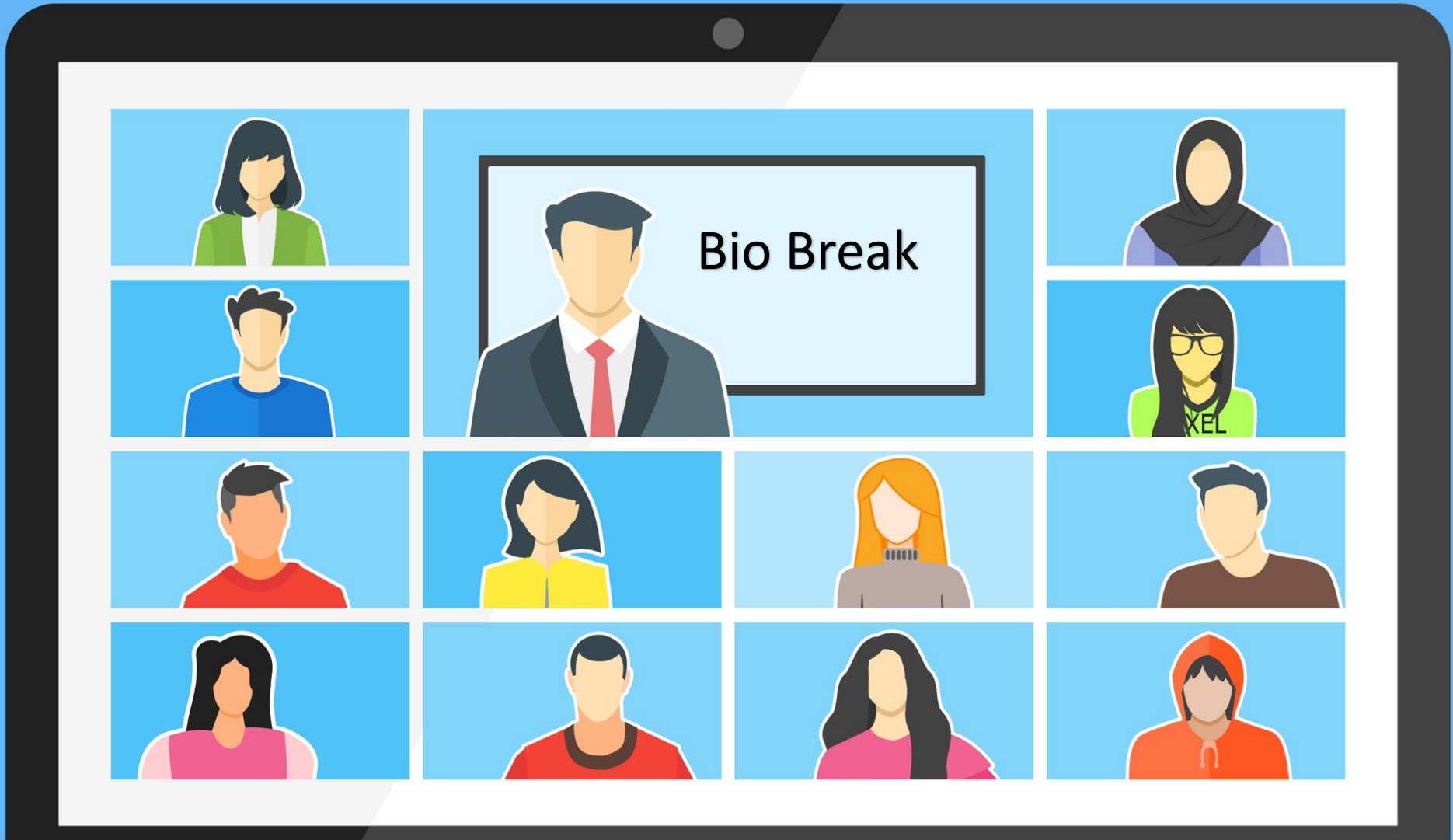
## TIPS FOR SOLICITATION

- Obtain permission to solicit businesses for in-kind donations during work hours
- Identify yourself as a CFD volunteer, NOT an employee at your agency
- If you're unable to use work time for in-kind solicitations, print solicitation letters and deliver them on your personal time or mail them

# ETHICS AND THE CFD

## RAFFLES AND GAMBLING

- RCW Title 9, Chapter 46
- Raffles are permitted, but the CFD cannot raise more than \$5,000 in raffle fundraisers per year (*Larger agencies might not be able to do raffles*)
- Raffle tickets cannot be sold as part of a “deal,” like “3 tickets for \$5”
- Raffle tickets have value: protect them like cash
- Gambling is prohibited and defined as a contest where the elements of prize, chance and consideration are present
  - Remove one element and this is no longer gambling



# Roundtable – Fundraising Ideas



# Fundraisers: Necessary Practices



# FUNDRAISERS

## PLANNING YOUR FUNDRAISER

- Set a budget: *Don't spend more money than you anticipate raising.*
- Select an **ACTIVE** charity to support: *You can choose multiple charities, we recommend no more than 3.*
- Communicate to your volunteer team that all fundraisers run through you
- Find who in your agency's fiscal department will manage your fundraisers
- Download all fundraiser forms to submit once your fundraiser is complete



# FUNDRAISERS

## IMPORTANT TIPS

- Send all Contribution Forms to the CFD: **Do not keep them until the end of the campaign**
- Consider pay dates when planning a fundraiser: the 10<sup>th</sup> is better than the 25<sup>th</sup>
- The CFD must have a record of your agency fundraisers, please remember to log that information
- Consider The General CFD fund, 0316854, to help offset administrative fees.

# FUNDRAISERS

## SILENT AUCTIONS

- Preference is to utilize online payment link
- If you allow donors to use payroll contribution to pay for silent auction items, make it clear to the donor and CFD that it is a maximum of 3 months.
- **Important: Turning in these documents to CFD as soon as possible.**



# FUNDRAISERS

## DURING YOUR FUNDRAISER - CASH HANDLING

- Check with your agency's fiscal department regarding internal cash handling policies & how they want to receive donations from your fundraiser
- Protect all donations at your event: Two volunteers must count and record donations before submitting them to your fiscal department

# FUNDRAISERS

## SUBMITTING A FUNDRAISER

- Get the transfer number and dollar amount from your fiscal department to complete your Fundraiser Transfer Form
- Use the info from the Fundraiser Transfer Form to enter your fundraiser online

***Fundraisers must be submitted by December 8th, 2023***

- Save a copy of all your fundraiser documents
- Send your fundraiser documents to the CFD
- Share the results of your fundraisers with your agency

# FUNDRAISERS

## REIMBURSEMENT

Do not spend more money  
on your fundraiser than  
you anticipate raising

Step 1: Complete the A-19 form, make copies of the A-19 and your receipts

Step 2: Save a copy of all reimbursement documents

Step 3: Send your reimbursement documents to your financial office

Step 4: Your financial office will reimburse your agency and CFD reimburses them

**Reimbursement requests need to be submitted on or before  
December 8th, 2023**



# Online Tutorial



# WHAT'S NEXT?

Get your team started!

Download your  
AGENCY  
VOLUNTEER  
REPORT

Work with your  
leadership to send  
an all-agency  
message

Send an email to  
your 2022  
volunteers

WEEK 1

Gauge your  
progress

Send another email  
to all 2022  
volunteers who  
didn't respond

Email a welcome to  
all of your new  
2023 volunteers

WEEK 2

Gauge your  
progress

Send another email  
to all 2022  
volunteers who  
didn't respond

Have leadership  
bring up CFD  
recruitment at a  
meeting

WEEK 3

Gauge your  
progress

Send another email  
to all 2022  
volunteers who  
didn't respond

Work to appoint  
volunteers in  
locations if  
necessary

WEEK 4

Enter all of your  
new volunteers into  
your Campaign  
Leader Profile

Notify leadership of  
all of your  
volunteers

Send a welcome  
email to all 2023  
volunteers

WEEK 5

## **JUNE/JULY**

- Campaign Leader Training
- Start recruiting your CFD team (5-week plan)
- Remind Local Coordinators to sign up for training
- Promote Seahawks Pre-Season Ticket Auction

## **AUGUST**

- Local Coordinator Training
- Meet with your team to discuss goals, themes, fundraiser ideas and monthly meeting dates
- Promote Seahawks Regular Season Ticket Auction

## **SEPTEMBER**

- Attend our Leadership Breakfast (Sept. 14)
- Promote our "First Week to Give" campaign kickoff event

## **OCTOBER**

- Participate in our First Week to Give (Oct. 2-8)
- Promote Seahawks Regular Season Ticket Auction

## **NOVEMBER**

- Giving Tuesday
- Promote our Charity Sweepstakes Event

## **DECEMBER**

- Fundraiser Deadline (Dec.8)
- Set a date in January to share campaign results/celebrate successes with the agency
- Keep outstanding volunteers in mind for Statewide Recognition Awards nominations

# QUESTIONS

