



2023

CAMPAIGN LEADER TRAINING

MEET OUR TEAM



Introductions

- Name, Pronouns
- Agency
- Number of Campaigns





AGENDA

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

Who?



What?

CFD BASICS

When?

Why?

Where?

CFD HISTORY



1984

The CFD was created through an Executive Order from Governor John Spellman with the assistance of Thurston County Auditor Sam Reed.



2000

The Executive Ethics Board deems the CFD a part of state business, allowing its volunteers to use state time and resources to run their campaigns.



2003

The CFD becomes official state law through the passage of RCW 41.04.033



2004

The CFD creates one of the first online giving platform for public employees in the country.



2010

The CFD moves from the Department of Personnel to the Office of the Secretary of State.

FACTS AND FIGURES

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

PAYROLL CONTRIBUTION

- **MONTHLY**

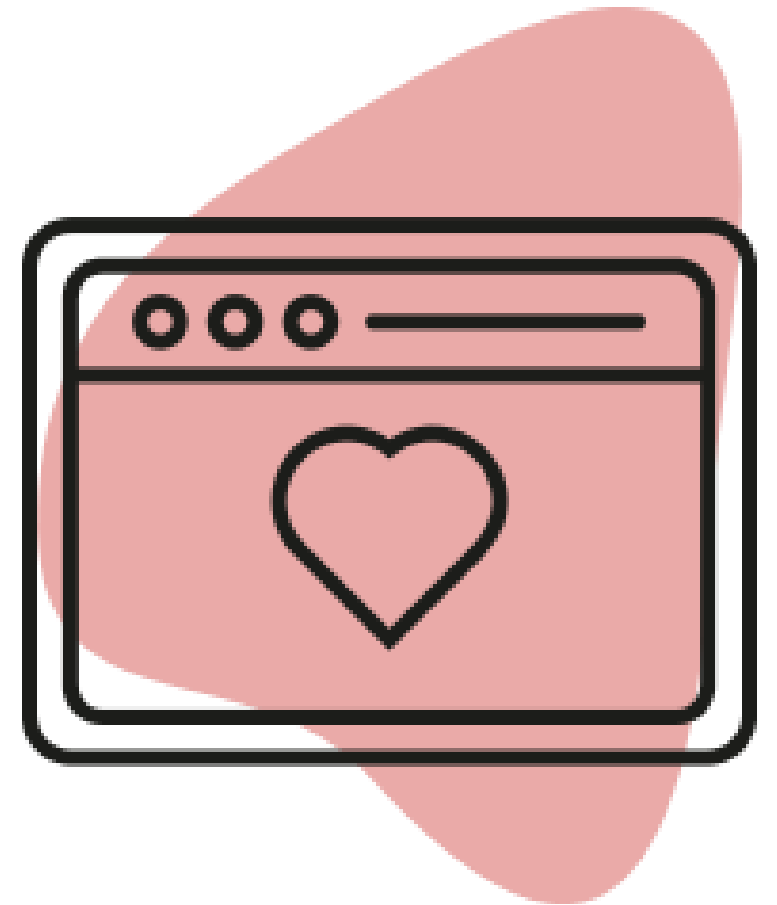
Employee selects a charity, start date and amount. Donation runs until employee cancels.

- **ONE-TIME**

Employee selects a charity, pay date and amount. Donation is taken out on specified date.

- **LIMITED TIME**

Employee selects a charity, start and end date, and amount. Donation is deducted until specified end date.



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:



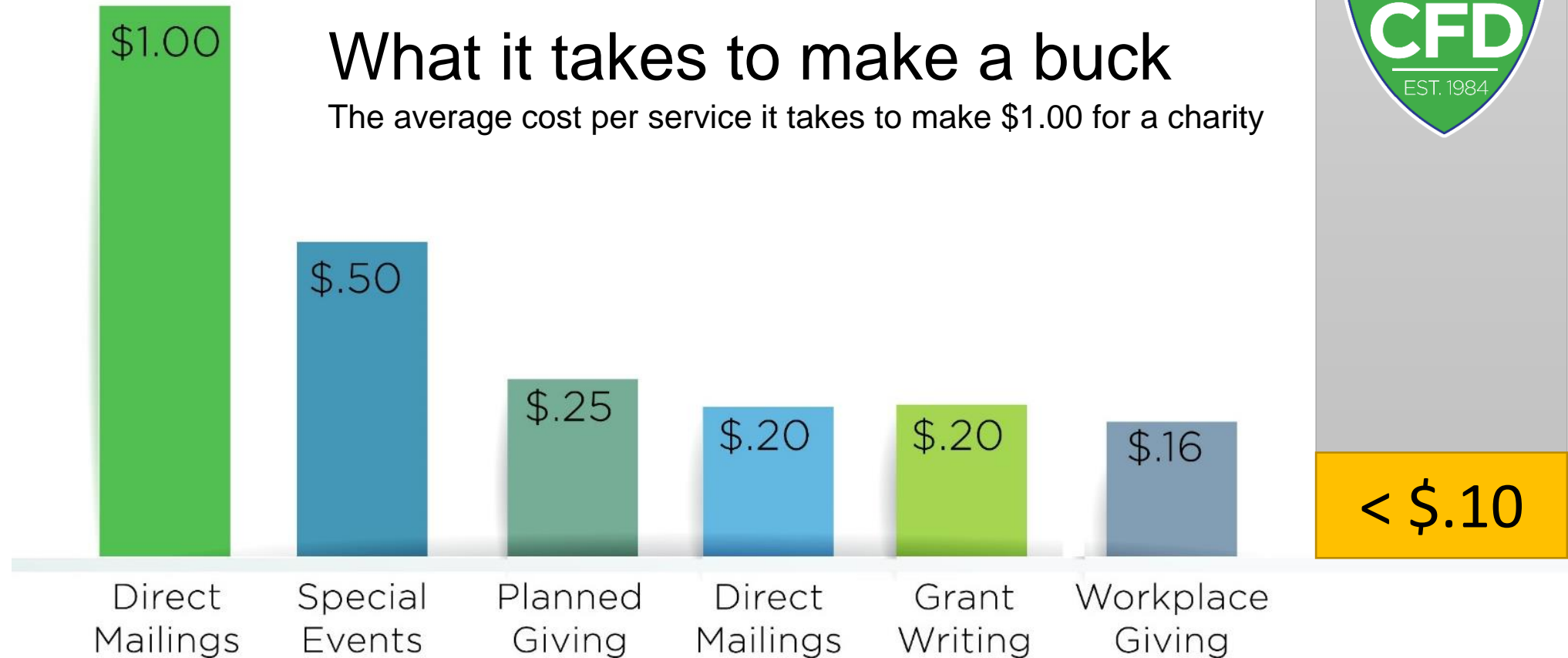
BENEFITS

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
- Anonymous





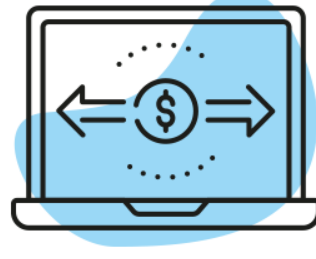
WHAT IT COSTS TO GIVE

WHAT IT COSTS TO GIVE



Text

- Over \$2,100, in starting cost and application fees
- + \$0.50 per transaction
- Reminder... These are one-time donations



Online Giving

- Using your credit card to start a gift with your charity through their website.
- Charges ranging from 2% - 10.75%
- Often one time donation
- Example: GoFundMe



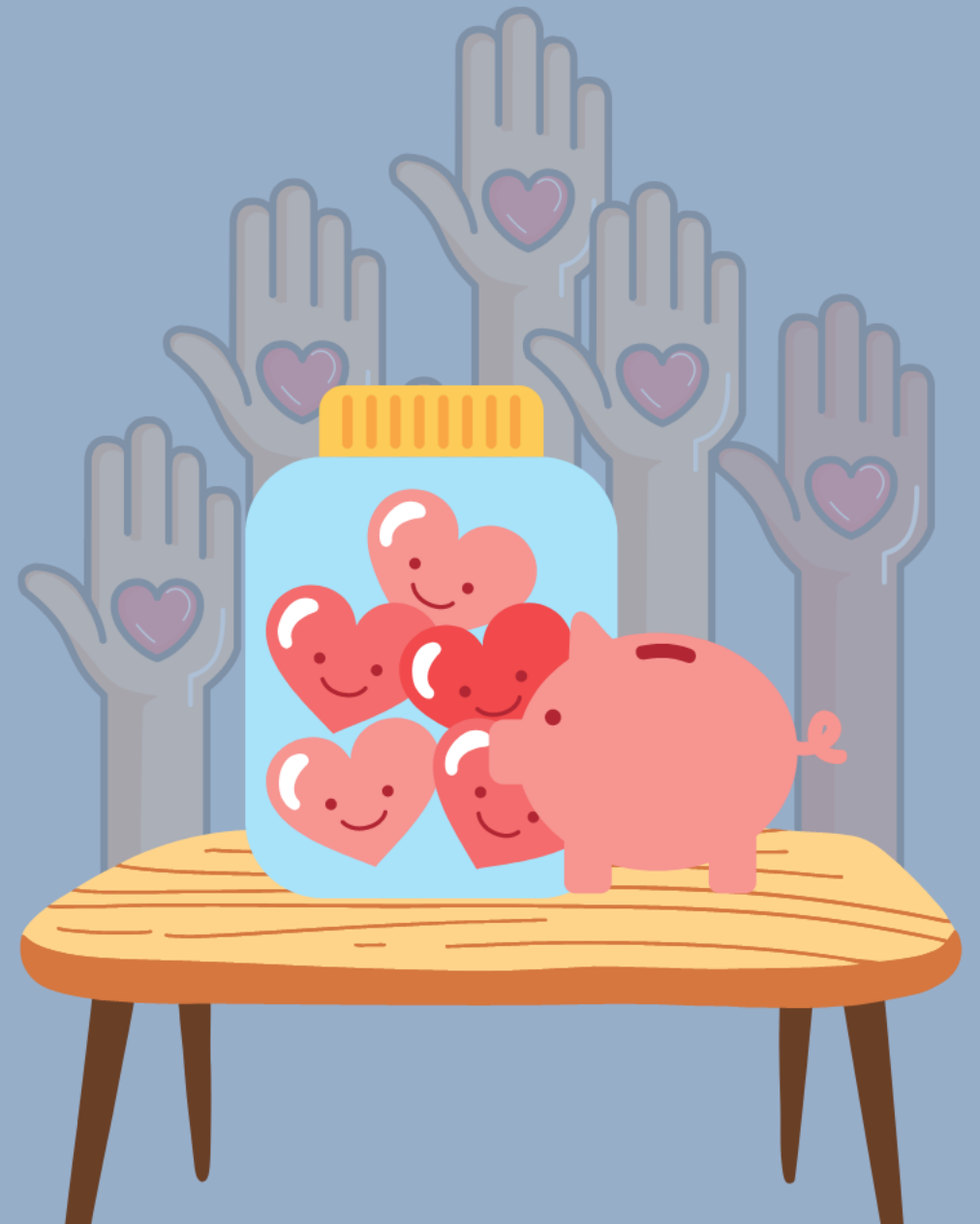
Personal Check

- It may cost a charity nearly \$20.00 to process an individual personal check due to staff time, banking fees, and additional labor costs.



- < 10% Administrative Fee
- This pays for CFD staff, training materials, travel, rent, IT, equipment, agency refunds and more.

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
- Share our Marketing Materials!
- Include State CFD information in interagency communications
- Ask executive sponsor to support through email or any other media content
- Speak 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

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

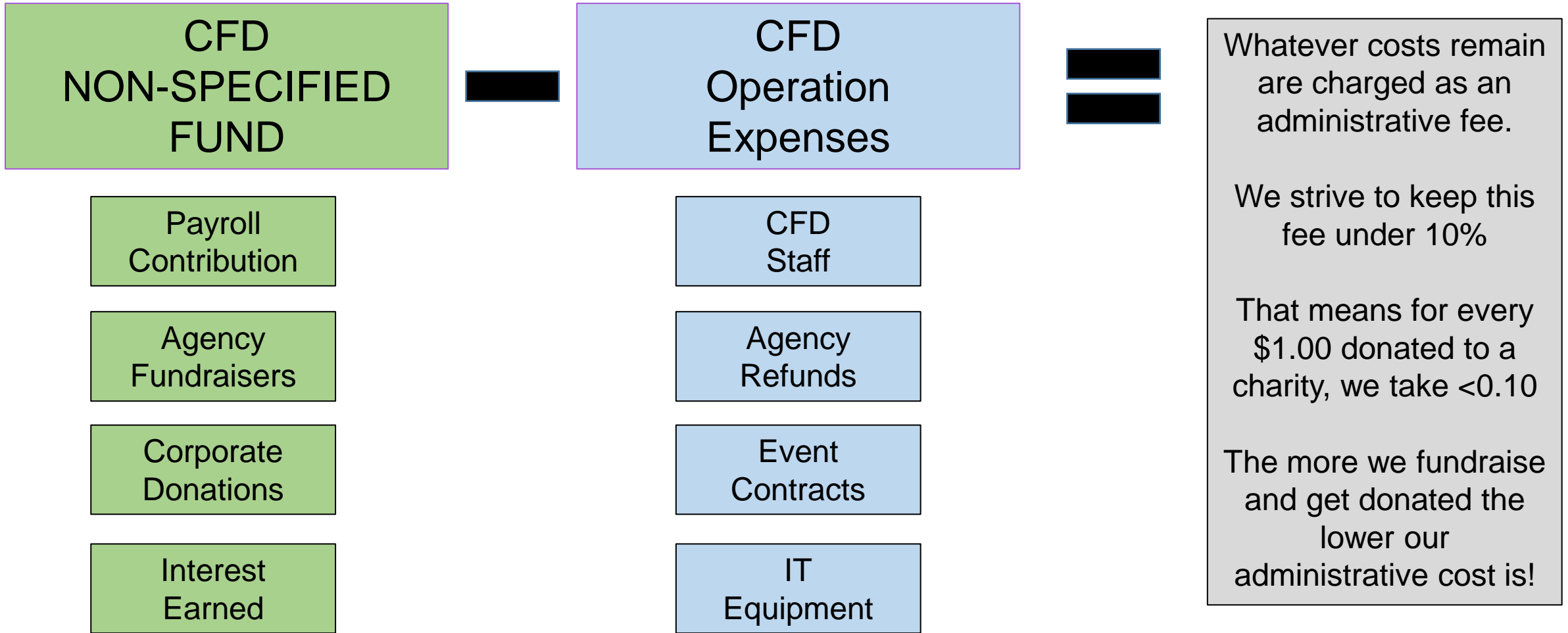
2QTR – April-June

3QTR – July-September

4QTR – October-December



ADMINISTRATIVE COSTS



ETHICS AND THE CFD

CONDUCTING CFD ACTIVITIES ON STATE TIME

- CFD is a legal part of state business: Advisory Opinion 00-09
- CFD volunteers can conduct CFD activities using state resources like employee time, equipment and supplies
- The amount of state resources devoted to CFD is left to the discretion of your agency
- Contact the CFD if you're having issues conducting your campaign

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 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 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



FISCAL

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.**

FISCAL

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. Please consider The General CFD fund to help offset administrative fees.*
- 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



FISCAL

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 10th is better than the 25th
- 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.

FISCAL

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

FISCAL

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 submit your fundraiser online

Fundraisers must be submitted by December 8th, 2023

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

FISCAL 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

