



2023

LOCAL COORDINATOR TRAINING

MEET OUR TEAM



Introductions

- Name, Pronouns
- Agency
- Number of Campaigns





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.

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

AGENDA

- CFD Basics
- How the Campaign Works
- Roundtable Discussion: Communication and Fundraising
- 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

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:

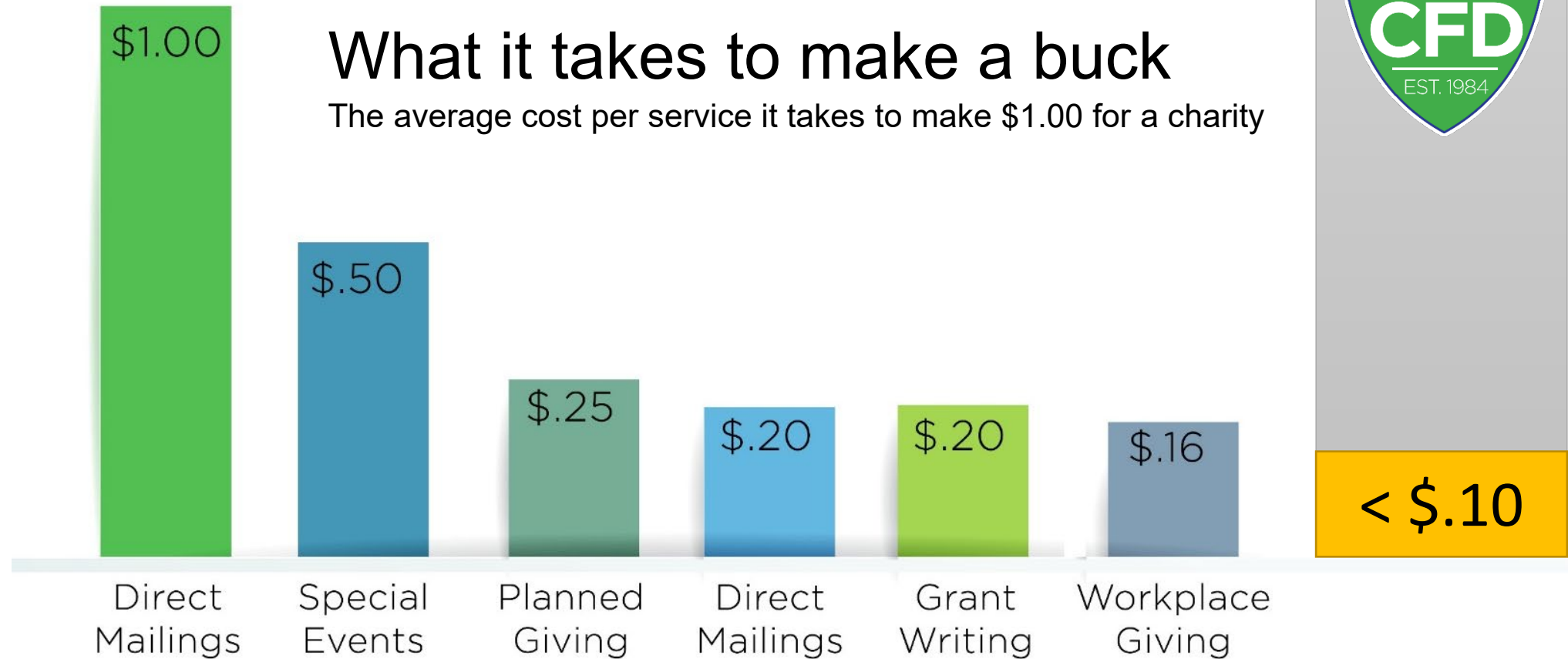


BENEFITS

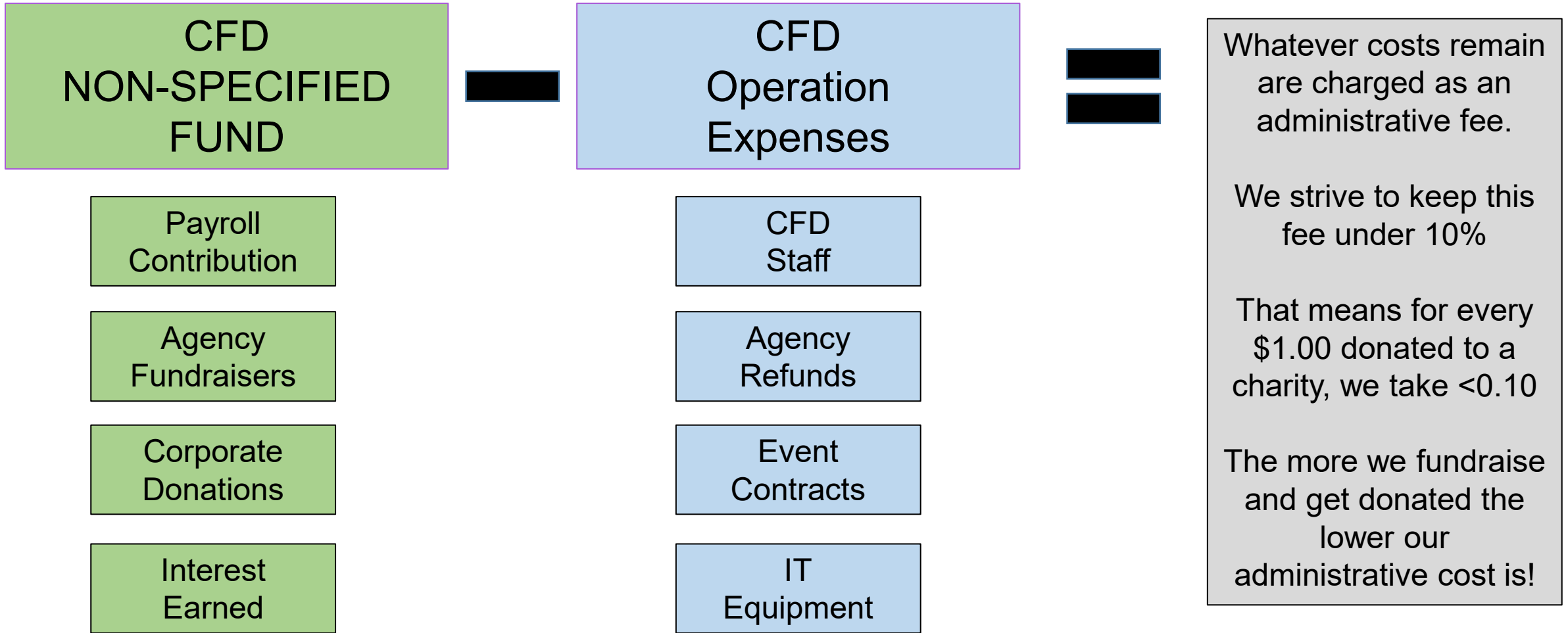
FOR CHARITIES

- 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



ADMINISTRATIVE COSTS



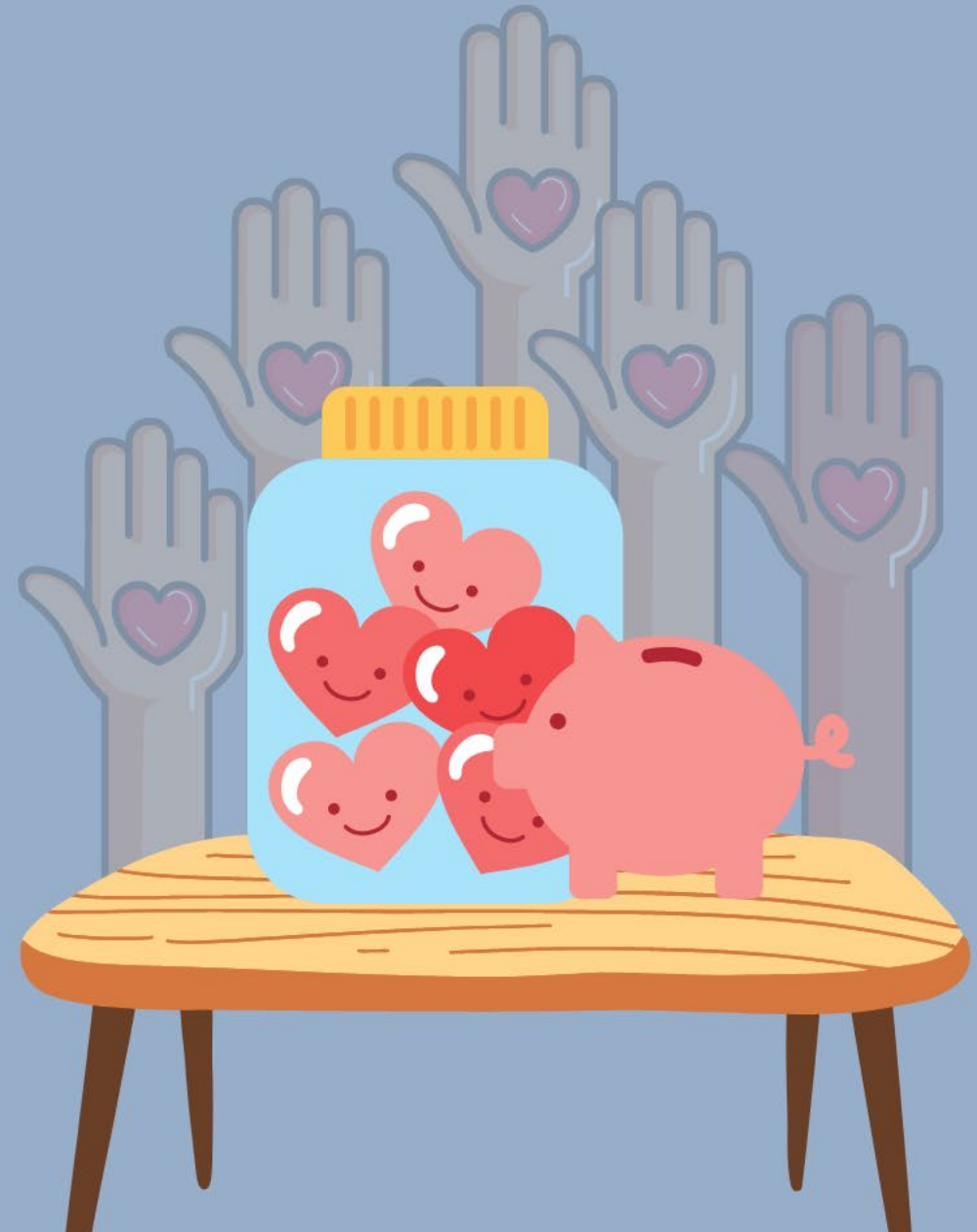
BENEFITS

FOR DONORS

- It's easy
- It's safe
- It's your choice
- It's Pre-Tax
- Anonymous



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

- **PLAN** events and/or giving promotions
- **EDUCATE** your donors
- **MAKE THE ASK**
- **COMMUNICATE** with your team
- **RECRUIT** your team



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
- 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

DISBURSEMENT QUARTERS

1 QTR; Jan.-March – April 30

2 QTR; April-June – July 31

3 QTR; July-Sept. - Oct. 31

4 QTR; Oct.-Dec. – July 31

- A state employee submits a donation pledge to the CFD.
- The CFD system sends an expected file to their agency payroll.
- The employee's payroll agency responds with an actual file confirming the amount processed.
- CFD receives confirmation of donation & reconciles donor profile.
- The employee's donation is disbursed to charity quarterly.



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 Campaign Leader 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

PLANNING YOUR FUNDRAISER



- Set a budget for your fundraiser: **Do not spend more money on your fundraiser than you anticipate raising**
- Select a charity/charities to support: **Charities must be active** as the CFD cannot transfer donations to closed charities
- Communicate to your Campaign Leader: all fundraisers need to run through them
- Find out how your Campaign Leader wants fundraising dollars submitted
- Download fundraiser forms you'll need to submit after your fundraiser is over

FISCAL

SILENT AUCTIONS

- We prefer to have donor pay for their item in FULL
- If allowing to make multiple payments, there is a maximum of 3 months (6 pay periods) .
- We have an updated Form for the 2023 Campaign (volunteer resources, giving materials, silent auction form)
- **Important: Turning in these documents to CFD as soon as possible.**

FISCAL

DURING YOUR FUNDRAISER - CASH HANDLING

- Check with your Campaign Leader for any internal cash handling policies
- Check with your agency fiscal department on 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
- Keep track of donations received and get copies of the “Fundraiser Event Form” and “Fundraiser Transfer Form” to your Campaign Leader

FISCAL REIMBURSEMENT

- **Do not spend more money on your fundraiser than you anticipate raising**
- Complete the A-19 form, make copies of the A-19 and your receipts
- Save all your reimbursement documents
- Send your reimbursement documents to your financial office
- Your financial office will reimburse you and CFD reimburses them
- Reimbursement requests need to be submitted on or before December 8, 2023

FISCAL

IMPORTANT HIGHLIGHTS

- 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 ensure that you get this information to your Campaign Leader!
- Consider fundraising at least a portion to General CFD to offset Administrative Cost



Online Tutorial



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

POST TRAINING

NEXT STEPS

- Get in touch with your campaign leaders about campaign logistics (ex. How many fundraisers should be held, goals for the season, list of fellow volunteers)
- Brainstorm fundraiser ideas!!
- Collaborate with your volunteer peers on an agency campaign goal(ex. Encouraging volunteer hours, increasing donor participation, highlighting a specific charity/cause)