



WASHINGTON STATE
COMBINED
FUND DRIVE

2010 Campaign Training
Handbook

Developed by:



2010 CFD Campaign Training

Overview

Introduction

The purpose of this training is to give you:

- Increased understanding of the **Combined Fund Drive (CFD)**
 - Tools to become a successful **Campaign Leader** or **Local Coordinator**
 - Inspiration to ***Make a Difference!***
-

CFD Mission

“Empowering Washington public employees and retirees to strengthen communities through the funding and support of charities.”

Thank You

This training manual was developed for you by the **Thurston County Steering Committee** for the CFD.



Outcomes

This publication will help you:

- Increase your understanding of the CFD
 - Develop a successful campaign
 - Implement a successful campaign
 - Market a successful campaign
 - Manage CFD money and other administrative processes with ease
-

2010 CFD Campaign Training

Table of Contents

Overview.....	1
Introduction.....	1
CFD Mission.....	1
Thank You	1
Outcomes	1
About the CFD.....	4
History.....	4
Ethics.....	4
Administrative Costs.....	4
Benefits of Giving Through CFD.....	5
Benefits to Charities.....	5
Benefits to Donors	5
Benefits to Community	5
Donating.....	6
Ways to Donate.....	6
Activating Online Accounts.....	6
Online Tutorials	6
Paper Forms	6
Donation.....	6
Start Dates.....	6
Becoming a CFD Charity.....	7
How a Charity Applies.....	7
How to Invite a Charity.....	7
Tools for Success	8
What You Will Learn.....	8
General Qualifications	8
Benefits to You	8
Take Away Message.....	8
Responsibilities for Planning	9
Knowledge	9

Training.....	9
Leadership Support.....	9
Team Recruitment.....	10
Plan Development.....	10
Plan Implementation.....	10
Marketing and Promotion.....	11
Key Messages to Share.....	11
Get the Word Out.....	11
Target Specific Audiences.....	12
Keep Momentum Going.....	12
Partner with Charities.....	12
Make the Ask.....	12
Recognition.....	12
Administrative Duties.....	13
Knowledge.....	13
Leadership Approval.....	13
Prompt Paperwork.....	13
Communicate.....	13
Learn and Grow.....	13
Get Help!.....	13
Campaign Resources.....	14
SMART Goals.....	14
Campaign Planning Checklist.....	15

About the CFD

History

The CFD is a workplace giving program available to Washington State Employees and retirees.

It was established to create an easy way for employees to support their favorite charities and reduce the disruption to government caused by conducting multiple fund drives throughout the year.

The CFD was established through Executive order in 1984 by Governor John Spellman and later put into state law. The law was modified in 2010 to move the CFD Program from the Department of Personnel to the Secretary of State. To view the new law, click on ([RCW 41.04.0331](#)).

Ethics

The CFD is as an official part of state business. State law allows CFD campaign activities in your office during normal business hours providing they comply with state and agency rules and regulations. For more details please refer to the [Washington State Executive Ethics Board opinion 00-09](#) and your agency leadership.

Administrative Costs

CFD is committed to keeping administrative costs low, ensuring 100% of your donation goes to the charity of your choice.

In 2009, the administrative cost for running the CFD was only 8.5%. Use of the on-line donation system helps keep administrative costs low. For updated information about our administrative costs please click on [CFD Administrative Costs](#).

Benefits of Giving Through CFD

Benefits to Charities

Saves time and money	Less staff time is needed to process individual donations. Charities save the expense of multiple fundraising campaigns so more dollars go to services.
Allows for budgeting	Quarterly electronic transfers through CFD to charities help charities to better plan their future services.
Gives essential support	CFD is one of the largest sources of income for many of its member charities

Benefits to Donors

Easy	Simply choose between automated payroll deductions or a one-time gift
Safe	CFD only lists charities that have been screened and approved and your contributions are kept confidential
Tax deductible	Donations are tax deductible and you have record of your payroll contribution
Choice	You get to choose the contribution amount and give to causes you care most about. There are over 3,800 approved charities. You may also invite a charity to become a CFD member
Control	You have ability to make changes at any time

Benefits to Community

Your donations help to achieve stronger, healthier communities locally, nationally, and globally by supporting programs in the following categories:

- Animals and the Environments
- Arts, Culture, and Humanities
- CFD Unspecified Non-Specified Fund/Federation Partners
- Children, Youth, and Family Services
- Disaster Relief and Emergency Services
- Education and Literacy
- Health and Medical Research
- Housing and Homelessness
- Human Services
- Hunger and Food Distribution
- International Relief
- Senior Centers and Services

Donating

Ways to Donate You can give online or by filling out a Contribution Form. For your convenience we now offer 5 different ways to give to your favorite charity:

1. Monthly Payroll Deduction
2. One-Time Payroll Deduction
3. Limited-Time Payroll Deduction (web only)
4. Recurring, Limited-Time Payroll Deduction (web only)
5. Personal Check

Payroll deduction is the easiest and most efficient way to give monthly donations to charities.

Activating Online Accounts To make a donation through the CFD's *online system* you must first activate your account. Activating your account means you:

- Gain secure 24hr access to your account
- Can change your donations at any time
- Create your own passwords
- Can view donation history from 2008 forward
- Can only make limited-time payroll deductions online

Online Tutorials Click: [How to Activate My Account](#) and view the online tutorial
Click: [Modify or Cancel My Donation](#) and view the online tutorial

Paper Forms You may use a paper form *without* activating your on-line account. The form will be processed by the CFD office staff.

Click: [CFD Contribution Form](#) to print a blank form or ask your local coordinator for a form. All forms require donor signature.

Donation Start Dates **Online Donations:** You are able to choose the start date for payroll deduction when donations are made online.

Contribution Forms: When forms are submitted *during the campaign* season (September - December), payroll deductions start on the first pay period of the New Year.

When forms are submitted *outside the campaign* season (January - August): Payroll deductions begin at the next possible pay period.

Becoming a CFD Charity

How a Charity Applies Any charity wanting to be a member of the CFD must submit an application. They must meet certain criteria like having a 501(c) 3 or 170(c) 1 status and being registered with the Secretary of State. Please refer to [Charities/Federations](#) section of the CFD web page for more information.

How to Invite a Charity If you cannot find your favorite charity in our listing it may mean that an application has not been submitted to the CFD office. In this case, you can invite this charity to become a member of the CFD.

This can be done by clicking the “[invite a charity to become a member of the CFD](#)” link on the Charity Search section of the web site.

Before becoming a member of the CFD, the charity will be given information necessary to start and complete the application process.

Click: [Invite a Charity to become a member of the CFD](#) to view the online tutorial.

Tools for Success

What You Will Learn

- Your role as a local Campaign Leader or Local Coordinator
 - How to develop a local plan
 - How to get local management support
 - How to put together an effective team
 - How to get the resources you need
 - Rules concerning fundraisers
 - Cash handling procedures
-

General Qualifications

The most successful Local Campaign Leaders and Local Coordinators are:

- Enthusiastic
 - Organized
 - Creative
 - Flexible
 - Able to work well with others
-

Benefits to You

As a Local Campaign Leader or Local Coordinator you:

- Have an opportunity to help others
 - Develop leadership skills such as:
 - Planning projects
 - Organizing events
 - Presenting oral and written information
 - Analyzing outcomes for future campaigns
 - Motivating others
 - Have something great to add to your resume!
-

Take Away Message

***You are the backbone of this great campaign
You help to raise millions of dollars for charities***

HAVE FUN AND RUN A CAMPAIGN THAT FITS YOUR OFFICE!

Responsibilities for Planning

Knowledge

As a Local Coordinator, you may not have all the responsibilities listed below. Work with your team to figure out who will do what activities. It is a good idea for you to know what is expected of everyone so you can fill in if needed.

Training

You are expected to complete Campaign Leader or Local Coordinator training. You may get training:

- In person
- Through Web-X
- Online at the CFD website

The most important thing is that you do it! Successful leaders know their business. Make the CFD your business.

Leadership Support

Leadership support and involvement are critical to a successful campaign. You should try to accomplish the following:

- Meet with your Director/Office Chief/CEO to get their overall focus, targets for goals, and general support for the campaign
 - Ask your leadership to formally introduce you and your office to the team in person or by memo
 - Invite leadership to “lead by example” and demonstrate their support by doing something special, silly, funny, etc., to motivate and engage employees to get involved and to exceed last year’s campaign goals
 - Ask your leadership if you can:
 - Provide volunteer training
 - Conduct planning meetings
 - Host special events (fundraisers/kick-off events)
 - Organize charity presentations
-

**Team
Recruitment**

You can't do it alone! Select people to help you who:

- Are enthusiastic, positive, well-respected, and who are comfortable asking others to get involved
 - Represent all groups in your workplace
 - Understand how the CFD works and that it is a part of state business
 - Willing to take CFD training online, via Web-X or in person (if available)
-

**Plan
Development**

Every successful campaign starts with a solid plan. As a CFD Leader or Coordinator you should:

- Review past campaigns to identify what worked and what didn't work
 - Develop your plan around your office culture
 - Create a timetable
 - Develop a communication plan
 - Set goals for success that are **SMART**:
 - Specific
 - Measurable
 - Achievable
 - Realistic
 - Timely
 - Include recognition as part of your plan
 - Begin early
-

**Plan
Implementation**

An important part of project management is following the plan you have established; it is your roadmap. At the same time, don't be afraid to make changes along the way if needed. You should:

- Be flexible
 - Communicate goals, progress, changes, and outcomes
 - Let others help you
 - Recognize efforts of all
-

Marketing and Promotion

Key Messages to Share

1. One-Stop-Shop

- The CFD provides one place for you to do all of your charitable giving
- Over 3,800 charities to choose from
- Secure 24hr. access to your online Donor Account
- Donate online at anytime from anywhere in the world
- Choose from one of 5 donation methods
- Make a donation “In Honor” of or “In Memory” of a loved one

2. Give Locally or Globally

- Our combined efforts go a long way in strengthening our local, national, and international communities
- Your money goes where you choose to help
- If you give to a cause in Eastern Washington, it stays in Eastern Washington. If you give to a group working in Central Africa, Louisiana, or in your backyard, your donation supports the great work being done in those areas.

3. Secure, Convenient and Efficient

- Latest encrypted technology protects your donation and account details
- New CFD web site provides enhanced search, giving and donor account features
- Screening process for charities ensures that charities meet the high standards set by the CFD before they are included in the CFD campaign
- If you choose, your donations can be kept anonymous

Get the Word Out

Use different communication mediums for a successful campaign:

- Posters
 - Fliers
 - Newsletters
 - Email
 - Local Radio
 - Local Web-sites
 - Staff Meetings
-

Target Specific Audiences

You can connect with new employees through your agency's New Employee Orientation or focus efforts toward employees who are retiring this year

Keep Momentum Going

To keep interest and forward momentum in your campaign you should:

- Give campaign updates throughout the campaign
 - Communicate a consistent CFD message throughout your workplace
 - Communicate messages that are meaningful and relevant to employees in your office
-

Partner with Charities

Invite charities to have a representative come tell their story at kickoff and promotional events by sharing first hand facts and figures about the value your donations make to their organization through stories, photos, testimonials, etc. (www.cfd.wa.gov has resources to help- click on the microphone!)

Ask them to set up a table at special events – if you have a charity fair or recognition event (they often provide give-away items if they have them)

- Include charities in campaign event planning
 - Identify local volunteer opportunities with charities
 - Publicize partnering activities through print and pictures
-

Make the Ask

In a recent post-campaign survey, over 30% of the people who reported they do not give stated they would be encouraged to give if they had more information, could have their favorite charity as an option, and if they were just asked.

- Ask if they have heard about the CFD
 - Answer any questions they have about CFD
 - Ask them if they would consider giving to their favorite charity through the CFD
 - Share that all support and donations to the campaign are welcome including money, time, goods and services
-

Recognition

Thank and praise volunteers for their efforts throughout the campaign. You can:

- Acknowledge staff informally
- Formally recognize volunteers
- Acknowledge staff who donate items for kick-off events and fundraisers

Administrative Duties

Knowledge	<p>Learn and follow your agency’s policies and procedures related to cash handling and fundraising. For example, are you allowed to:</p> <ul style="list-style-type: none">• Solicit or accept donations from businesses for fundraisers• Conduct raffles
Leadership Approval	<p>Ensure leadership approves time spent conducting CFD activities. The amount of time you spend on events is determined by your leadership. This includes employee time, equipment, and funds.</p>
Prompt Paperwork	<p>Manage. Collect and process paperwork during and immediately after events. You should:</p> <ul style="list-style-type: none">• Be certain to have two people present when counting money• Log all checks• Secure all funds• Ensure funds are deposited <i>within 24 hours</i> of event unless your agency has a waiver with the Treasurer’s Office
Communicate	<p>Summarize results of fundraisers, volunteer events and pledges. Communicate to your office immediately following an event. Use your agency’s web-site to post pictures, write-ups, or speak at agency meetings.</p>
Learn and Grow	<p>Review and analyze your overall campaign performance and results. Create a “lessons learned” document that the next year’s leaders can use to improve outcomes or avoid “alligator pits”.</p>
Get Help!	<p>When in doubt, ask for help. It’s ok to tell people you will have to get back to them in answering a question. Then consult your resources such as this handbook, the CFD office, your Campaign Leader, or County Committee (Note: Not all counties have an active CFD committee. If you need help setting one up, contact the CFD office.</p>

Campaign Resources

SMART Goals
S = Specific
M = Measurable
A = Attainable
R = Realistic
T = Timely

Specific: The What, Why and How.

- What are you going to do?
- Why is this important to do at this time?
- How are you going to do it?
*Example:
What to hold- a Kick-off Event
Why hold it- to raise awareness of the CFD
- How – Have a “3 C’s of CFD”, Cake, Computers and Contributions!
Set up laptop computers where you and other volunteers can answer CFD questions, show employees how to set-up a CFD account online & assist them doing so, and have cake as an incentive to show up.

Measurable: Choose a goal with measurable progress, so you can see the change occur. Establish concrete criteria for measuring progress toward the attainment of each goal you set.

*Example – By 9/1/2010 obtain authorization for 6 laptops for 9/15/2010 Kick-off event.

Attainable: A goal needs to stretch you slightly so you feel you can do it and it will need a real commitment from you. The feeling of success which this brings helps you to remain motivated.

*Example – You have laptops, volunteers and cake available you just have to organize their acquisition.

Realistic: Means “do-able”. It means the skills needed to do the work are available.

*Example – You can organize the event giving the time and thought.

Timely: Set a timeframe for the goal. Putting an end point on your goal gives you a clear target to work towards.

*Example – The Kick-off event will be on 9/15.

**Campaign
Planning
Checklist**

Sample Checklist

Task	Due Date	Done
Recruit your team	May – Aug, 2010	✓
Identify local coordinators and order supplies via your Administration Campaign Leader	June 30, 2010	✓
Obtain leadership support	June 30, 2010	✓
Start planning your campaign	July 15, 2010	✓
Local Coordinators to complete online training	July – Sept. 2010	✓
Train Local Coordinators on agency cash handling	July – Aug. 2010	✓
Send all Contribution forms to DSHS CFD office	Nov. 30, 2010	
Thank employees and volunteers	Ongoing	
Nominate volunteers for DSHS and Statewide CFD awards	Dec. 15, 2010	
Share results and evaluate your campaign	Jan. 2011	
Recognize your volunteers and donors	Dec. 2010 – Feb. 2011	
If available, attend recognition event in your area	Early 2011	
