



2009

Local Coordinator Handbook



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Section 1: About the Combined Fund Drive

A. History and Purpose

Created in 1984 the Combined Fund Drive (CFD) was established to consolidate the numerous charitable fundraising campaigns being conducted on state work-sites. In short, the purpose of the Combined Fund Drive is to provide one avenue through which Washington State employees can raise money for charities.

Our mission:

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

24 Years of Growth

- In 1984, a total of 16,200 contributors raised \$1.2 million for 850 different charitable organizations.
- In 2008, approximately 20,000 employees donated more than \$5.74 million to over 2,600 charities.
- State employees have contributed more than \$89 million through the CFD since the program inception.
- Washington State's charitable giving program is one of only four states in the nation to exceed \$5 million in pledges.

Is the CFD Ethical?

YES! The CFD is as an official part of state business. In other words, state law allows you to run a CFD campaign in your office during normal business hours. For more details please refer to the CFD web page (www.cfd.wa.gov) for links to the *Washington Administrative Code (WAC) Title 357, Chapter 357-55* or read the Executive Ethics Board opinion in the back of the handbook.

B. How Does the CFD Work?

As a Local Coordinator you play a crucial roll in the success of the CFD. As the backbone of this great campaign, you will work with your workplace Campaign Leader to help lead the effort to raise millions of dollars via payroll deduction, one-time gifts, and participation in fundraisers.

We recognize that each office has a different environment. So we ask that you have fun with it and run a campaign that fits the culture you work in.

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 way to give monthly donations to charities. Charities prefer this method because monthly donations are predictable and help lower fundraising costs.

Benefits of giving through the CFD

- Donations accrue interest in the state treasury.
- Our efficient distribution process helps to lower fundraising costs for charities.
- Charities are screened before becoming a member of the CFD.
- Our new online giving tool allows each donor secure access to their own donation account.
- Donations are tax deductible.

Activating Online Accounts

With our new online system it is required that all donors who desire to give online activate their account.

Why activate?

1. Donors gain secure 24hr access to their donor account.
2. Donations can be changed at any time.
3. Passwords are created by the donor.
4. Donors can view donation history from 2008 onward.
5. Limited-Time payroll deductions are only available online.

Must an online account be activated in order to give with a Contribution Form?

No. The form will be processed by the CFD office staff if a donor prefers to give with a paper form.

When are Donations Deducted From Paychecks?

Online Donations -

The donor is able to choose the start date for payroll deduction when donations are made online.

Contribution Forms -

1. When forms are submitted during the campaign season (September - December): Payroll deductions start on the first pay period of the new year.
2. When forms are submitted outside the campaign season (January - August): Payroll deductions begin at the next possible pay period.

Administrative Costs

There is a cost to running the CFD. Traditionally we have been able to keep admin. costs low enough so that at least 100% of a donation is passed onto the charity. In these tough economic times the CFD will do everything possible to keep costs low and to pass on as much money as possible to the charity. For updated information about our admin. costs please go to our web page and click the "About" link.

C. CFD Charities

There are over 2,800 screened and approved charities in our campaign. These charities serve a variety of needs locally, nationally and around the world.

Charity Application Process

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.

Invite a charity to become a CFD Member

If a donor cannot find their favorite charity in our listing it may mean that an application has not been submitted to our office. In this case, a donor can invite the 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 website.

From there, the charity will need to go through the application process before becoming a member of the CFD.

Charities Love the CFD

"Support through the Combined Fund Drive is ideal: it's reliable, it allows us to connect with numerous caring people in the community, and it saves us administrative time processing one combined check instead of many individual ones."

- Becky Guerra, Director of Development, Northwest Harvest

"Funds raised through the Combined Fund Drive's payroll deduction are some of the most efficient dollars raised for non-profit organizations. Charities also appreciate the cost efficiency of receiving one consolidated check from many workplace giving campaigns."

- Tracy Spring, NW Regional Director, Global Impact

"Contributions are always a welcome surprise, whenever they arrive, but getting that notice early in the year from CFD telling us how much we can anticipate receiving allows us to plan our budget with more certainty, it's very helpful for us."

- Ann Vandeman, Executive Director, Left Foot Organics

Section 2: Being a Local Coordinator

Local Coordinators help run the CFD campaign inside a specific area within their workplace. The difference between a Local Coordinator and a Campaign Leader is that the Campaign Leader manages the campaign for the entire agency or campus, whereas a Local Coordinator oversees one particular department, office, division or region.

Primarily, Local Coordinators help the Campaign Leader with developing a culture of giving, communicating with all employees about the benefits of giving through the CFD and providing them an opportunity to give. Successful Local Coordinators are enthusiastic, personable, well-respected, creative and are able to work well with others. Your responsibilities include, but aren't limited to:

A. Working with People

- Oversee office/department/division campaign efforts.
- Educate your coworkers about the benefits of giving through the CFD.
- Provide employees with contribution forms, charity guides, and educate them about navigating the online system.
- Coordinate fun and informative meetings/events to promote the CFD.
- Work with your Campaign Leader to recognize outstanding volunteers or donors.

B. Planning

- Attend training. Most Local Coordinator training will be done by your Campaign Leader.
- Coordinate with your Campaign Leader to order CFD supplies for your workplace. Your Campaign Leader will place the order with the CFD office.
- Work with your Campaign Leader to become familiar with cash handling and fundraiser policies.
- Meet with your Campaign Leader and past volunteers to identify strengths and weaknesses in last year's campaign.
- Set goals with your Campaign Leader (i.e. A \$ amount, # of Donors, % increase of donors).
- Develop effective ways to invite all employees in your workplace to participate in the CFD.
- Become proficient in using the CFD website.

- Know campaign deadlines and other important dates.

C. Communication

- Work with your Campaign Leader to develop a communications plan that uses different ways to promote the campaign.
- Use promotion/marketing material provided by the CFD.
- Communicate a consistent CFD message throughout your workplace.
- Explain the benefits of giving through the CFD.
- Answer CFD related questions from employees and volunteers.
- Invite charity speakers to join you at staff meetings and CFD fundraisers.
- Work with your Campaign Leader to communicate final results from the campaign.

Section 3: Running a Successful Campaign

A. Important Dates to Remember

Local Coordinator Training	July – September 2009	Campaign Kickoff	September 14, 2009
Campaign Leaders Order CFD Supplies	June 30, 2009	Paperwork Deadline	November 30, 2009
CFD Mails Campaign Materials	August – September 2009	Campaign Results at www.cfd.wa.gov	Ongoing

B. Campaign Planning Checklist

Task	Due Date	Complete
Start planning your campaign	June 15, 2009	
Work with your Campaign Leader to order CFD Supplies	June 30, 2009	
If doing a fundraiser: Meet with your finance office regarding the cash handling policy	June 30, 2009	
Your Campaign Leader will train you on how to process fundraisers	June 2009	
Learn your agency's cash handling and agency solicitation procedures	July – August 2009	
Attend training	July – Sept. 2009	
Distribute CFD promo materials and contribution forms	Sept. - Nov. 2009	
Your Campaign Leader submits all CFD paperwork	November 30, 2009	

Thank employees and volunteers	Ongoing	
Nominate volunteers for county/state awards	December 2009	
Share results and evaluate your campaign	January, 2010	
Work with your Campaign Leader to recognize volunteers and donors	Dec. 08 – Feb. 09	
If available, attend recognition event in your area	Early 2010	

C. Important Campaign Information

- The CFD is doing everything possible to decrease expenses. Likewise, we ask that you **STRONGLY CONSIDER THE RETURN ON INVESTMENT OF TIME, MONEY AND ENERGY** when planning your fundraiser or kickoff event.
- Campaign supplies will be mailed to you. To reduce costs the CFD is scaling back in the number of items available. Please work with your Campaign Leader to order only what you will need to run your campaign.
- Your Campaign Leader will input your contact information into the CFD online system. This way the CFD office can easily send you supplies and communicate important messages.
- The CFD webpage is always improving. Make sure you know how to navigate through it.
- GivingStation usernames and passwords are invalid. **ALL DONORS MUST ACTIVATE THEIR ACCOUNT IN THE CFD'S NEW ONLINE SYSTEM** in order to donate online.
- Monthly payroll deductions will roll over into the new year. Go to page 2 of this handbook for more information on when donations will be deducted from paychecks.
- Work with your Campaign Leader to run campaign reports for your workplace.
- Make sure that all checks are made out the **COMBINED FUND DRIVE**.

D. Best Practices

"Best Practices" are defined as the most efficient and effective way of accomplishing a task based on repeatable procedures that have proven themselves successful over time. Over the past 24 years we have figured out that there are a few things you can do to get the most out of your time and energy. Follow the suggestions below and you will be well on your way to a successful campaign.

Learn the Basics

- Attend training
- Know how to navigate through the website. The training link on the CFD website provides videos to guide you through the processes of:
 - Activating a donor account
 - Searching for a charity
 - Completing a donation
 - And more...
- Know the benefits of giving through the CFD. Check the "Why Give" section on the CFD website.

Management Support

- **Your Campaign Leader will be working to set up an Executive sponsor. This person will advocate for the CFD at the highest level of leadership in your workplace.**
- Communicate with management about your role as a Local Coordinator and gather their support.

- Ask management if you can do the following: plan meetings, special events and charity presentations.
- Ask management to speak in support of the campaign at employee meetings.
- Encourage management to attend activities and special events. Especially the kickoff and recognition events.
- Update your leadership on how things are going with the campaign. Especially when milestones and goals are met along the way.

Develop a Plan

With your Campaign Leader:

- Review past campaigns and identify strengths and areas for improvement.
- Evaluate your agency's culture to determine what will work.
- Develop a campaign strategy and timetable.
- Work with your Campaign Leader and management to establish measurable goals.
- Consider campaign award and recognition criteria when setting your goals.
- Begin planning early and assign specific responsibilities with completion dates.

Make the Ask

We ask that you extend an invitation to 100% of your fellow employees to participate through the CFD.

The following tips will provide some guidance on how to effectively "Make the Ask".

- The most effective way of "Making the Ask" is through person-to-person interaction and contact.
- Use staff meetings and special events as an opportunity to share the benefits of giving through the CFD.
- Try to "Make the Ask" while the energy is high in your workplace.
- Enthusiasm can be created by communicating news about the campaign or identifying areas of need in your communities.
- Inviting a charity to come in and do a presentation creates a great opportunity to "Make the Ask".
- Use different forms of communication to reach your employees. As part of your plan consider: sending an email, leaving an all staff voicemail, sending everyone a contribution form, showing the CFD video at a meeting, leaving charity guides out or hanging campaign posters up in your office.
- Be available to help answer employees questions or concerns.

Recognition

Our surveys show that about 50% of Local Coordinators don't "want" or "need" recognition for their hard work. However, we all know it is nice to be recognized for a job well done. Work with your Campaign Leader to:

- Host a campaign recognition meeting/event.
- Where available, encourage the entire team to attend CFD Recognition and Awards Celebrations.
- Display final campaign results and campaign awards received.
- Work with leadership to send a letter of appreciation to all of those who participated in the CFD.
- Give creative gifts like:
 - Thanks for raisin' the dough! Give a small box of raisins wrapped in play money.
 - We appreciate our Motivated & Multi-talented volunteers! Give a bag of M&Ms.
 - "You are a LIFESAVER!" Give Lifesaver candy with a thank-you note.
 - You take the cake!" Give a cupcake with a card saying "You Take the Cake!"

E. Communication and Marketing

Since each agency/campus has a unique culture we ask that you coordinate with your Campaign Leader to craft the following messages in a way that is meaningful and relevant to employees in your workplace.

Key Messages

One-Stop-Shop

- The CFD provides one place for you to do all of your charitable giving
- Over 2,800 charities to choose from
- Secure 24hr. access to online Donor Account
- Donate online at any time from anywhere in the world
- Choose from one of 5 donation options
- Make a donation "In Honor" of or "In Memory" of a loved one

Give Locally or Globally.

- Our combined efforts go a long way in strengthening our local, national and international communities.
- Your money goes where you want it to.
 - 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.

Secure, Convenient and Efficient

- The latest technology is used to encrypt and protect your donation and account details.
- The CFD's new website provides enhanced search, giving and donor account features.
- Charities go through a screening process to ensure that they meet the high standards set by the CFD State Committee before they are included in the CFD campaign.
- If you choose, your donations will be kept anonymous.

Marketing and Promotion

Here are a few things you can do to simply and successfully promote the CFD in your workplace.

- Keep your message simple and consistent.
- Say your message many times and in different ways.
- Make your message memorable.
- Familiarize yourself with the advantages of the CFD program, and needs in your community.
- Use promo/marketing material provided by the CFD.
- Schedule a time during an existing meeting to talk about the campaign.
- Invite charity speakers to meetings or special events.
- Ask a coworker to share a story of how they or someone they know was helped by a charity.
- Host imaginative and fun events that promote the CFD.
- Report to your management and co-workers your progress throughout the campaign.

F. Campaign Resources

Check out everything that is available at your fingertips to help you run a successful campaign.

CFD Staff

A listing of CFD staff is available online.

County Committees

There are county committees in counties with a large state employee presence. This way Local Coordinators can easily access training and CFD resources.

Charities

The campaign resources listed below is generously provided by non-profit organizations including, but not limited to, the following federations: America's Charities, ArtsFund, Community Health Charities, Earth Share of

Washington, Global Impact, United Ways around the state, and Women's Funding Alliance, which collectively represent hundreds of charities.

- Speakers for kickoff and promotional events
- Tabling special events – if you have a charity fair or recognition event
- Give-away items
- Campaign event planning and assistance
- Facts and figures about the value your donations make
- Stories/photos
- Materials for newsletters.

Campaign Supplies

The CFD office will provide virtually everything you need to run your campaign. Please work with your Campaign Leader to order your CFD supplies through our web page.

Limited CFD Funds

The CFD may have funds available for promotion of your campaign. These funds may be used at your Campaign Leader's discretion for an agency event or recognition at the end of the campaign. The CFD does not provide these funds to you in advance and these funds cannot be used to offset fundraiser expenses. When you purchase goods (i.e. muffins and coffee for a kickoff event) please send your A-19 with the original receipt and mark on the A-19 CFD Kickoff/Recognition expense and your agency name. More information will be available when the CFD budget is approved.

State Funds & Resources

The use of state resources is allowable to run the CFD campaign. The amount of resources is left to the discretion of the agency director or higher education president.

Section 4: Special Events & Fundraisers

NEW FUNDRAISER POLICY !!!

Work with your Campaign Leader to go over new fundraiser policy that is in effect for the 2009 campaign.

Kickoff events and fundraisers are a terrific way to raise awareness for the CFD. The amount of time you spend to plan events is determined by your agency director or president. They have the discretion to use state resources, which includes state employee time, equipment, and funds. All proceeds from fundraisers will be added to your campaign total by filling out the necessary paperwork and sending to the CFD by the end of November.

Remember: It's important to make sure that your fundraising event will be profitable

A. Are Raffles Ethical?

YES! RCW 9.46.0209 allows state employees to conduct raffles. One very important piece of this law states that raffle tickets cannot be sold outside of your workplace. So please be diligent to only sell tickets to employees that work within your agency. Read RCW 9.46.0209 for more information on raffles in the workplace.

B. Can I Solicit a Business for my Fundraiser?

It is encouraged that state employees *do not* solicit local business *as an agency employee* for prizes. We recommend that you work your management and Campaign Leader to determine the agency's procedures soliciting businesses or contacting vendors. Please work with your Campaign Leader to become familiar of these procedures. If your agency approves limited solicitation please be aware some companies have specific instructions on how they wish to be contacted for solicitation by charity, and a limited time of year they will accept requests.

The CFD office is available to provide a solicitation letter on CFD letterhead to help with the solicitation process. The CFD is also able to provide a tax deduction receipt for "In Kind" donations toward CFD events. You can find a donation receipt in the volunteer section of the our web page.

C. What do I do with Fundraiser Cash and Checks?

CFD requests that your agency or campus take every step necessary to properly handle cash and checks that come in during the campaign. Especially money that comes in during fundraisers. Please carefully read the following information to ensure that everything is handled correctly.

Cash Handling Policy:

The Department of Personnel (DOP) and the Office of Financial Management (OFM) have developed a policy for handling cash and checks payable to the CFD for Combined Fund Drive fundraisers and is available in the appendix. While your workplace may have internal procedures for handling cash deposits, it is *very important* to remember that all cash and checks (payable to the CFD) collected at a fundraising event be deposited within 24 hours, unless you have secured a waiver from OFM.

Checks and cash collected at fundraising events need to be deposited with your Finance Office. **Cash should never be sent to the CFD office.** Additionally, the CFD no longer accepts checks made directly payable to a charity. If you receive a check like this please return it to the donor and ask them to write out another check to the CFD or have them send it directly to the charity.

Deposits

The cash handling policy applies to fundraiser events. DO NOT deposit any checks that come to you with Contribution Forms. The DOP cash handling policy outlines that your agency needs to deposit cash and checks payable to the CFD, received during a fundraising event, within 24 hours with your agency. Please send all Contribution Forms and checks, with a check log, to your Campaign Leader as soon as you receive them.

Inputting Fundraisers into the CFD online System:

WE STRONGLY RECOMMEND THAT YOU COORDINATE WITH YOUR CAMPAIGN LEADER ON ALL FUNDRAISERS HAPPENING IN YOUR WORKPLACE. There are specific steps that must be followed in order to correctly process fundraisers. Your Campaign Leader will input your fundraisers into the online system.

Reimbursements

Connect with your Campaign Leader on how to process reimbursements and for approval of expenses before they are incurred.

Section 5: Paperwork

Important Note: The CFD office must receive all paperwork by the end of November to be credited for the current campaign year. If contributions and fundraisers are inputted after the campaign year, the totals will count for the next year.

A. Contribution Forms

Please send all original, signed Contribution Forms to your Campaign Leader. Your Campaign Leader will gather all forms and send them to the CFD office to be inputted into our system. Make sure each form is completed and signed before sending them to your Campaign Leader. If a donor's contribution is a personal check, please staple check to the Contribution Form and send in with a check log.

Attention: Do not deposit checks accompanied by Contribution Forms into the fundraising account even if the donor intends to use it to pay for a fundraiser event (i.e. an auction item etc.).

B. Check Log

List each check that comes with a *Contribution Form* on a check log. Please send the original Check Log along with the check and Contribution Forms to your Campaign Leader. Keep a copy for your records.

C. Fundraiser Form

Work with your Campaign Leader on all fundraisers. They will instruct you on the proper way of handling all fundraising money and paperwork.

Section 6: The CFD Website

The CFD recently launched a new website. This new site offers you the newest technology to make it easy for everyone to donate to their favorite charity. Here are some of the features built into the new website.

A. Volunteer Account

Your Campaign Leader will be set up as a volunteer in our new online system. You will not have access to this account, but it will make it possible for Campaign Leaders and the CFD office to easily communicate with you. It will also give us the ability to ship CFD supplies directly to your workplace.

B. Order Supplies

Work with your Campaign Leader to order your CFD supplies through our online system. The DEADLINE to order supplies through our web page is JUNE 30, 2009. Please do everything you can do meet this deadline as it will allow the CFD office enough time to process these orders in time for the campaign.

C. Reports

Your Campaign Leader has access to a number of reports that provide information about how your workplace is doing during the campaign.

D. Donor Accounts

The new website offers ease and convenience to those who wish to make a donation online. Please remember that ALL employees must ACTIVATE their donor account before they are able to complete their donation or view their account. This enhanced security feature apply's even to those who have been giving through the CFD for years. Why? The activation process allow us to authenticate the user and set up a password for them.

Appendix

Executive Ethics Board - ADVISORY OPINION 00-09

Use of State Resources/Combined Fund Drive

References: RCW 42.52.160. Use of persons, money, or property for private gain.

ISSUE

Does the use of state resources such as employee time, equipment, and supplies for the Combined Fund Drive violate RCW 42.52.160(1)?

OPINION

The answer is no. RCW 42.52.160(1) does not apply to the conduct of state business. The Combined Fund Drive is part of the business of the state, so RCW 42.52.160(1) does not apply. However, the amount of state resources that may be devoted to the drive is a matter left to the discretion of each agency.

ANALYSIS

This opinion concerns the Combined Fund Drive. RCW 41.04.036 authorizes voluntary deductions from the pay of state officers and employees for charity. In 1984, Governor Spellman issued Executive Order 84-13. The Order noted that there were a number of charitable fund raising drives directed at state employees. The Order sought to solve this problem by setting up one annual fund raising drive. To implement the Executive Order, in 1985 the Governor's Office adopted rules establishing the State Employee Combined Charitable Contribution Program, WAC 240-10. WAC 240-10-010(2) established the Washington State Employee Combined Fund Drive Committee. The purpose of the program was to:

- (a) Lessen the burdens of government and of local communities in meeting the needs of human health and welfare;
- (b) Provide a convenient channel through which state employees may contribute to the efforts of the qualifying voluntary health and welfare organizations providing services in the community or region where the employees live and work and overseas;
- (c) Minimize both the disruption of the state work place and the costs to taxpayers that multiple charitable fund drives have caused; and
- (d) Ensure that recipient agencies are fiscally responsible in the uses of the moneys so raised.

WAC 240-10-020(2).

The rules establish the composition of the committee. WAC 240-10-010(3). The department of personnel provides the administrative support for the operation of the committee. WAC 240-10-010(11). At present, the committee has three full-time staff members. The rules set up criteria a charitable organization must meet before being allowed to participate in the combined fund drive. WAC 240-10-040-050. The Committee is responsible for determining eligibility. WAC 240-10-055. At present, approximately 1600 charities participate in the drive.

The fund drive operates through each state agency. The committee seeks to appoint a fund coordinator in each agency. In some large agencies two employees may share the coordinator's job. The committee also tries to have a coordinator in each local office. The amount of time an agency or local coordinator spends on the combined fund drive depends on agency management. Some are supportive and the coordinator may devote a lot of time to the drive. In other agencies very little is done.

The question is whether the use of agency personnel and resources for the Combined Fund Drive violates RCW 42.52.160, which provides, in part:

- (1) No state officer or state employee may employ or use any person, money, or property under the officer's or employee's official control or direction, or in his or her official custody, for the private benefit or gain of the officer, employee, or another.
- (2) *This section does not prohibit the use of public resources to benefit others as part of a state officer's or state employee's official duties. (Emphasis added.)*

The answer is no. The combined fund drive is conducted pursuant to RCW 41.04.036 and WAC 240-10. The purpose of the drive is not only to raise money for charity. It is also designed to reduce the disruption to government that formerly existed when there were a number of fund drives. RCW 42.52.160(2) provides that the limits on using state resources in RCW 42.52.160(1) do not apply when the use of resources is part of a state officer's or employee's official duties. The Combined Fund Drive is part of the official duties of any officer or employee assigned to run the drive in his or her agency.

Although participation in the combined fund drive is part of an officer's or employee's duties, the time devoted to this task must be compatible with the officer's or employee's other duties. Thus, agency management is responsible for determining how much time can be devoted to this task.

Invite a charity to become a member of the CFD

If you cannot find your favorite charity in any of our guides you can invite them to become a member of the CFD. Please complete all of the fields below. The CFD will contact each organization to begin the application process. If donating by check please **make your check payable to the Combined Fund Drive.**

Charity Name		EIN or Tax ID #		
Address		City	State	Zip
Phone	Email		Website	
Monthly Payroll Donation: \$	One Time Payroll Donation: \$	Donation by Check: \$		

Charity Name		EIN or Tax ID #		
Address		City	State	Zip
Phone	Email		Website	
Monthly Payroll Donation: \$	One Time Payroll Donation: \$	Donation by Check: \$		

Charity Name		EIN or Tax ID #		
Address		City	State	Zip
Phone	Email		Website	
Monthly Payroll Donation: \$	One Time Payroll Donation: \$	Donation by Check: \$		

Charity Name		EIN or Tax ID #		
Address		City	State	Zip
Phone	Email		Website	
Monthly Payroll Donation: \$	One Time Payroll Donation: \$	Donation by Check: \$		

Charity Name		EIN or Tax ID #		
Address		City	State	Zip
Phone	Email		Website	
Monthly Payroll Donation: \$	One Time Payroll Donation: \$	Donation by Check: \$		

Please Sign and Date - Thank You for Making a World of Difference!

I wish to donate anonymously and ask that my name and information not be released for recognition purposes.

X _____ date _____
(your signature is required to process donation)

By signing this form I understand that once started, my monthly payroll deduction will continue automatically unless changed by either completing a new Contribution Form, updating my donation account online at www.cfd.wa.gov, cancelled by checking the cancel box or by written notice to the CFD office. In signing this form I acknowledge that my donation account will be updated per the guidelines and information 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 RETURN THIS FORM TO YOUR CFD CAMPAIGN LEADER OR LOCAL COORDINATOR

Making a world of difference since 1984

Department of Personnel (DOP) Combined Fund Drive (CFD) Fund Raising Cash Handling Policy

The Washington State Combined Fund Drive (CFD) is the program within the Washington State government through which state employees and public agency retirees can make charitable donations to nonprofit organizations. The director of the Department of Personnel (DOP) is authorized to adopt rules for the operation of the Washington State Combined Fund Drive.

This policy applies to all state agencies and higher education institutions engaged in CFD fundraising activities. It does not apply to funds received from individual employees from payroll deductions or checks written, for regular CFD contributions.

References for CFD Authority: Governor's Executive Order 01-01; RCW (Revised Code of Washington) 41.04.033; RCW 41.04.035; RCW 41.04.036; RCW 41.04.039; RCW 41.04.040; RCW 41.04.230; RCW 43.01.050, RCW 42.52, and RCW 43.79A.040; Executive Ethics Board Frequently Asked Questions #14-19. References for Office of Financial Management (OFM) Authority: State Administrative and Accounting Manual (SAAM) 85.50

Contacts: Combined Fund Drive - CFD Program Manager
Department of Personnel - DOP Financial Manager
Office of Financial Management - Agency-Assigned Accounting Consultant

CFD Funds Raised Must Be Safeguarded

Agencies must establish adequate internal controls over CFD funds and fundraising activities. Controls should include procedures for the deposit of fundraising donations into the State Treasury by the next day of receipt. Refer to SAAM Chapter 20, Internal Control and Auditing, for further information regarding internal controls (<http://www.ofm.wa.gov/policy/20.htm>).

CFD Fundraising Dollars Must be Deposited Daily

Cash, and checks written to the CFD, from CFD fundraising activities, must be deposited into the State Treasury by the next day of receipt. Fundraiser dollars must be deposited to Account 525 (Washington State Combined Fund Drive Account) within their own agency. Fundraiser dollars must be deposited intact (no expenses deducted). Deposit of these monies into a local fund or petty cash fund does not meet the requirement of RCW 43.01.050. In the event a state agency or higher education institution is not able to meet the deadline for deposit into Account 525 by the next day of receipt of these fundraising monies, a waiver should be requested from this requirement (per SAAM 85.50.10a, <http://www.ofm.wa.gov/policy/85.50.htm>) from the Office of the State Treasurer (OST), to the attention of the Deputy Treasurer for Operations. Institutions of Higher Education will deposit cash into their local fund. If you have any questions, please contact the Cash Flow Manager at OST, at (360) 902-8906.

Procedure

Action by:

Campaign Leader/Coordinator

Agency Fiscal Office Staff

Action:

Counts and records CFD Fundraising dollars.

Takes CFD Fundraising dollars to the agency fiscal office daily for deposit.

Deposits all fundraising cash and checks written to the CFD into account 525 within their agency or a Higher Education local fund through their process of agency daily deposits.

Checks written to a specific charity

The CFD no longer accepts checks written directly to a charity. All checks received during a fundraising event must be payable to the CFD. Any contribution can be designated to a specific charity even if the check is made out to CFD. Contact DOP Financial Services at 664-6290 with any questions regarding checks received at a fundraising event.

Fundraising Receipts and Fundraising Reports are Transferred to DOP

Transfer fundraising dollars to DOP via journal voucher, warrant, EFT, or IAP (use SWV #0006746-04) per the instructions found on page 9 of the CFD's Campaign Leader Handbook by December 16th. If you have any questions, please contact Heidi Jones, DOP Financial Manager, at (360) 664-6338 or heidij@dop.wa.gov.

CFD Reimburses Fundraising Expenses

State agencies may pay for CFD fundraising expenses out of their state budget and request reimbursement from the DOP (WAC 357-55-515). The DOP will reimburse agencies for CFD fundraising expenses. Fundraising expenses must be less than receipts.

<u>Action by:</u>	<u>Procedure</u> <u>Action:</u>
CFD Campaign Leader/Coordinator	Receives a reimbursement for CFD fundraising expenses from their agency.
Agency Fiscal Office Staff	Prepares an invoice for the CFD office (PO Box 47530, Olympia, WA 98504) of all fundraising expenses paid by state agency or higher education institution funds. This includes reimbursements of petty cash funds. Send invoices to DOP.
DOP CFD Manager	Approves agency invoices for fundraising expenses and forwards them to DOP Financial Services.
DOP Financial Services	Reimburses agencies for fundraiser expenses.

CFD May Fund CFD Petty Cash Accounts Within Agencies

Depending on the need, the CFD may fund CFD Petty Cash Accounts (Account 525) within agencies or institutions of higher education. CFD Petty Cash Accounts are used only for CFD Fundraising costs. Establishment of CFD petty cash accounts is subject to DOP approval and must be requested each campaign year. Once the petty cash account is approved by DOP, the CFD will issue funds as needed to participating state agencies and higher education institutions.

<u>Action by:</u>	<u>Procedure</u> <u>Action:</u>
CFD Campaign Leader	Sends a request to fund the CFD petty cash account to the CFD Office, PO Box 47530, Olympia, WA 98504-7530. Please be sure to obtain approval from your agency's finance office first.
CFD Office Staff	Approves the request to fund a petty cash account for account 525, including the approved limit, for each agency or higher education institution asking for this funding. Requests the DOP Financial Services office to generate petty cash warrant.
DOP Financial Services	Generates a CFD petty cash warrant.
Agency Fiscal Office Staff	Establishes a CFD petty cash account in fund 525 and deposits provided petty cash funds Returns petty cash to agency 111 at the end of each campaign year.

Sample - Employee Meeting Agenda

Show CFD Campaign video	6 min
Introduction by Local Coordinator	2 min
Remarks from leadership person in the office	2 min
Testimonial from employee or invite a charity speaker	6 min
Closing remarks from Local Coordinator	4 min
Total time	20 min

Group Exercise: If time allows this group exercise is a great way to raise awareness about the importance of giving through the CFD.

Instructions: As each question below is posed to the audience, ask those who can answer “yes” to any question to raise a hand. If a subsequent question also applies, ask those sitting to raise a hand – or two hands, a foot – and keep them raised.

Questions:

- Have you, or anyone you know experienced a power outage for more than three days (perhaps due to a severe NW autumn storm?)
- In the last three months, have you spent time in a state or national park, enjoying our pristine environment?
- In the last three months, have you enjoyed any Washington trails?
- In the last three months, have you fished in a Northwest river or lake?
- In the last month, have you benefited from an HOV lane?
- In the last year, have you enjoyed the waters in the Puget Sound area?
- Do you have a child, grandchild, niece or nephew with a special talent in art, music or dance?
- Do you have a friend or relative given or received an organ transplant?
- Have you or someone in your extended family, ever given birth to a premature infant?
- Do you have a parent or grandparent afflicted with Alzheimer’s or dementia?
- Did you, or a child you love ever get involved in a youth/after school program?
- Have you or anyone you’ve known benefited from a scholarship?
- Have you, or anyone in your extended family been diagnosed with cancer, diabetes or stroke?
- Do you have a less than perfect teenager and concerns about smoking, alcohol, drugs or teen pregnancy?
- Are you wearing an article of clothing made in a developing country? (You may ask a neighbor to read a label you can’t reach.)
- Have you or anyone you’ve known benefited from advances in medical research?
- Have you ever experienced a volcanic eruption or an earthquake?
- Have you ever adopted an animal from a pet shelter?
- Have you donated food or clothing in response to a disaster, either domestic or abroad?

Conclusion:

Look around the room. Yours are the stories behind the Combined Fund Drive. You and those you love benefit from the work of local, national and international charities. You can support them through the Combined Fund Drive. The CFD is not so much about “giving to them” as it is about “investing in us”. The CFD is about sustaining our communities’ capacity to respond in times of need. It’s about recognizing those times of need happen in everyone’s life – in your life and mine. Make an investment that pays important lifetime dividends. Please choose to give.

