

2023

A watercolor illustration of a honeycomb structure in shades of yellow and orange. Several bees are depicted flying around the honeycomb. The text 'Local Coordinator Guide' is overlaid on the center of the honeycomb.

Local Coordinator Guide



WASHINGTON STATE
COMBINED
FUND DRIVE



GOVERNOR
JAY INSLEE
CFD CO-CHAIR



SECRETARY OF STATE
STEVE HOBBS
CFD CO-CHAIR

Photo: (Right to Left) Governor Jay Inslee, Secretary of State Steve Hobbs. Both are Co-Chairs to the Combined Fund Drive

THANK YOU LOCAL COORDINATORS!

The Combined Fund Drive (CFD) staff deeply appreciates the work you are about to do. This program's success relies on your volunteerism. We are here to help you along the way. So pick up the phone or send us a message!

Your energy, effort, and passion for charitable giving will help excel this program into the next level of giving!

This booklet will help you and your team to understand the CFD, your role, and how to work with your agency to give to charities that matter most to you and your team.

Sincerely,

The CFD Team

LOCAL COORDINATOR RESPONSIBILITIES

Local Coordinators are the heart of the Combined Fund Drive campaign. As a Local Coordinator you have the chance to make a personal connection, have fun, and boost morale with co-workers. All while making a positive difference in your community.

Responsibilities include, but are not limited to:



Working with People

- Build a team of diverse volunteers who fill different needs (design work, public speaking, etc.)
- Hold fun charitable fundraisers
- Promote payroll contribution
- Recognize and thank volunteers, managers, and charities who helped the campaign

*Tip: You don't have to be alone, ask management to have a CFD Volunteer team!

Planning

- Attend CFD training (July-August)
- Talk to your supervisor about the CFD
- Goals don't have to be monetary or statistical, but it should resonate with your office
- Think about local issues (hunger, education, environment, etc.) to help set your theme/event
- Set and meet deadlines
- Learn about CFD's online tools
- Ask your campaign leader for ordering CFD promotional materials



Communication

- Develop a communication plan for your events (i.e. e-mails, posters, calendar invites to fundraising events, etc.)
- Use promotion/ fundraiser events provided by the CFD
- Answer CFD-related questions from co-workers
- Hold regular meetings with your CFD team
- Ask employees to give to their favorite charities through payroll contribution
- Ask charities to speak at staff meetings or CFD events



Administrative Duties

- Follow all cash handling policies and depositing fundraiser money appropriately
- Manage, collect, and process reporting to Campaign Leaders
- Share results to management and Campaign Leaders
- Review/analyze your campaign performance and results
- Summarize final information so it can be readily available for the next campaign

COLLECTING PLEDGE FORMS

- A** Payroll contribution may be accepted at a fundraiser. All pledge forms must be completely filled out, and signed by the donor. Pledge forms are for: Monthly, One-Time, and Cash or Check Donations
- B** Once collected, send directly to the CFD state office.
- C** Collection of pledge forms at fundraisers, must be supervised and secured by a volunteer.
- D** Payroll contribution forms are not counted as income to be transferred or entered as fundraisers online.

BEST PRACTICES CASH & CHECKS

- A** All checks and money orders must be made out to the Combined Fund Drive. If they are not, they must be returned to the donor for correction.
- B** If the donor wants their cash or check donation associated with their name, the donor must be present and verify the cash amount matches what is indicated on the pledge form.
- C** Paper clip the cash or staple the check to the pledge form.
- D** Collection of cash and checks must be supervised by a volunteer. Secure cash and checks for any fundraiser in a locking cash box, or bag, and transport them to your fiscal office within 24 hours.
- E** Two volunteers must count all cash collected together.

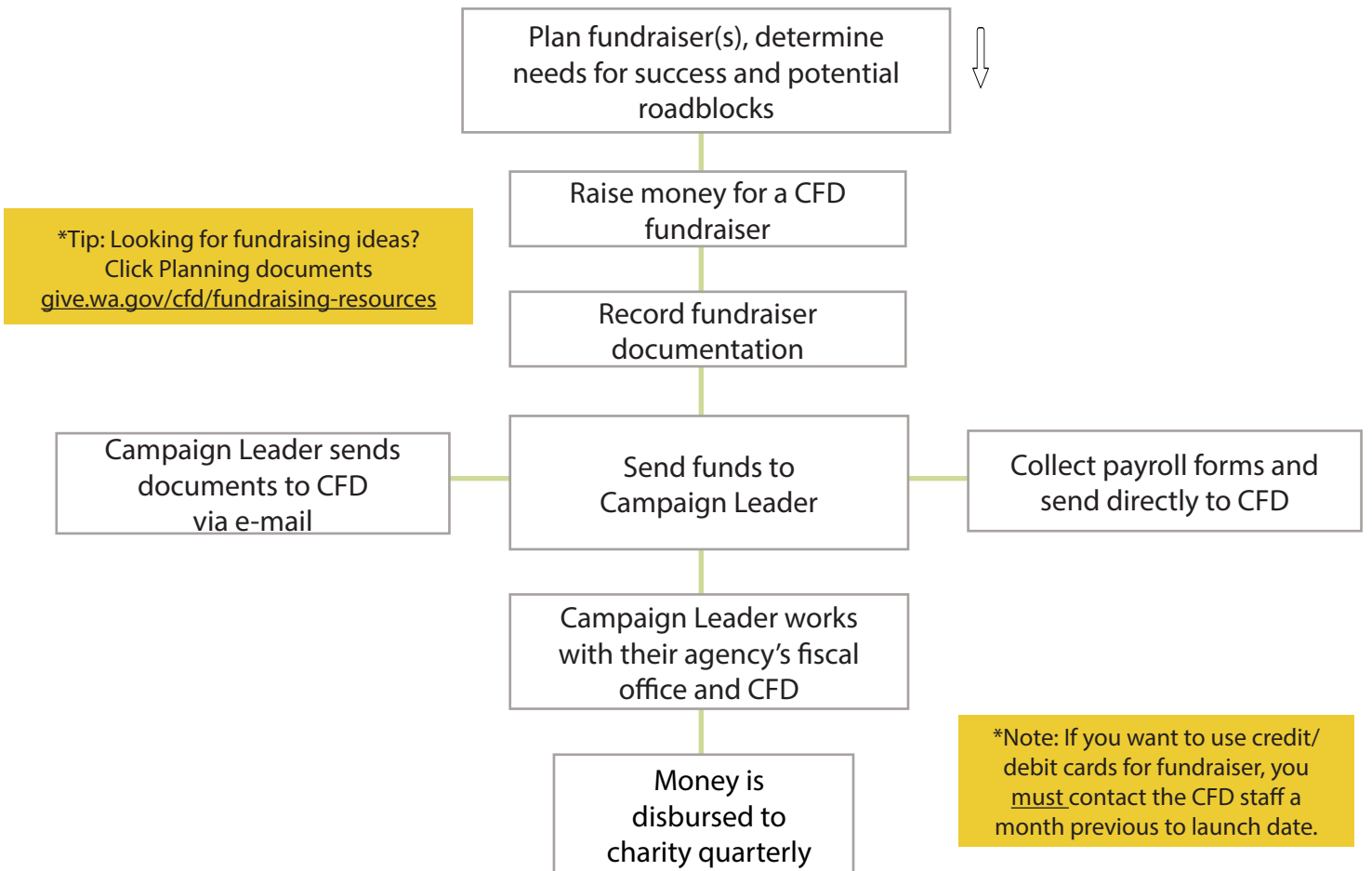
*Tip: A fiscal department employee is a great volunteer for cash handling!

How-to Count:

- 1** Volunteer 1 counts the funds, documents the total and initials the total while Volunteer 2 watches.
- 2** When Volunteer 1 is finished, Volunteer 2 counts the funds, documents the total and initials the total while Volunteer 1 watches.
- 3** If both totals match, secure funds in the locking cash box and transport them to your fiscal office within 24 hours.
- 4** If the funds don't match, both volunteers need to recount all funds and repeat the process.

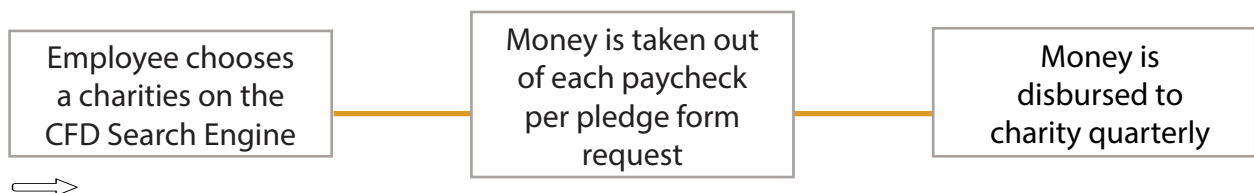
AGENCY FUNDRAISERS

Below is a flow chart of how the process works for Local Coordinators working with Campaign Leaders. You must send money no later than 24 hours after fundraiser collection to your Campaign Leader.



PAYROLL CONTRIBUTION

The best ways for employees to connect with their favorite cause is through a sustainable and safe gift of payroll contributions.



CAMPAIGN CALENDAR



JUNE — JULY

- Campaign Leader Training
- Campaign Leader's recruit CFD Local Coordinators around the state from your agency
- Encourage CFD Local Coordinators to attend CFD training
- CFD Day at the Tacoma Rainiers
- First round of the CFD Online Sports Auction begins

AUGUST

- Order CFD annual giving materials for yourself and/or your Local Coordinators from the CFD state office
- CFD Local Coordinators training



SEPTEMBER — NOVEMBER

- CFD Annual Giving Campaign Begins
- First Week to Give Promotion
- Agency results are posted to the CFD website

DECEMBER

- Transfer all fundraiser dollars to the CFD office and OSOS Financial Services by December 9, 2022. Transferring after this date may result in disbursement in April 2023.
- Nominate your volunteers and leaders for county and state awards



FEBRUARY — APRIL

- If available, attend a recognition event in your area

YOUR STAKEHOLDERS

Being a CFD Local Coordinator, you need the support of your management agency's Campaign Leader to work with your volunteer team.

CAMPAIGN LEADER

Campaign Leaders are your agency-wide CFD lead. They're here to assist you! If you have questions about your agency guidelines for the CFD, they are in the know! Want to run a CFD Fundraiser? Check in with your Campaign Leader to make sure they know about it, and if you need any support.

- Recruiting Local Coordinators (You!)
- Logging Local Coordinator's fundraisers
- Ordering CFD supplies for Local Coordinator's offices
- Building a theme agency specific or CFD's theme
- Communicate with Local Coordinators (You!)

*Tip: You are not alone, your team, Campaign Leaders and Executive Management are there to help in your efforts!

EXECUTIVE SPONSOR

Executive Sponsors are chosen by your agency's director/president. They help you gain support from the executive management team, spread internal communication about your CFD efforts, and can give agency guidance to local supervisors about the CFD.

Their duties may include:

- Sending e-mails of support
- Assisting in Local Coordinator volunteer recruiting efforts around the state
- Acting as a liaison with management
- Communicate with all management levels regarding your role as a Campaign Leader
- As well as showing support for the CFD efforts
- Ask your Director/President to support you in training your volunteers, planning educational
- Ask about a CFD agency budget, some agencies have money allocated meetings, planning special events and providing charity presentations to staff
- See if the Director/President and managers may agree to do something special, silly, funny, etc., to motivate employees as a celebration when your agency or department exceeds campaign goals.

LOCAL AGENCY MANAGERS AND SUPERVISORS

It is important for you and your local coordinator's manager/supervisor to understand that the CFD is part of state business and show support

Their duties may include:

- Support planning of the event
- Speak at the local coordinator's event
- Inform employees they can participating in attending the events and give through payroll during work hours.

QUALIFYING CHARITIES

To become a CFD Member Charity in the CFD, the charity must have both of the following:



Be registered with the IRS as a charitable organization. Either a 501(c)3 or 170(c)1.



Be registered as a charity with the Washington State Office of the Secretary of State.

CFD ETHICS

Fundraising for charities in the office can lead to questions about the ethics involved with administering your CFD giving campaign.

CAN I REALLY DO THIS ON STATE TIME?

Yes. According to Ethics Opinion 00-09, the CFD is considered business of the state. This opinion gives our registered CFD volunteers the freedom to use state time and resources to conduct CFD campaign events.

Below are some examples:

- Use your office printer to print off flyers or CFD meeting agendas
- Schedule meetings about possible fundraisers
- Conduct fundraisers during work hours
- Use the CFD website to donate and find resources

CAN I SOLICIT OUTSIDE BUSINESS FOR IN-KIND DONATION?

This is a trickier question. The WACs that govern our program allow CFD volunteers to solicit local businesses and organizations for in-kind donations in Washington state, but it is ultimately at the discretion of your agency. Many regulatory agencies do not allow their employees to solicit due to possible conflicts of interest.

If you are allowed to solicit make sure to do the following:

- Approach businesses during your off-time or lunch breaks (no paid hours)
- Clearly identify the nonprofit organization for which you are raising the money (either the CFD or an active CFD member charity)
- Do NOT identify yourself as a state employee. You are a CFD volunteer
- Do NOT approach businesses you directly regulate or contract with

If your agency does not allow you to solicit, contact the CFD state office. Our staff is willing to assist you in your procurement.

*Note: Internal state agency policies regarding in-kind donation solicitation supersede the CFD state office policies. Contact your agency ethics officer for clarification.

INFORMATION ON GAMBLING

*Note: Washington State employees are prohibited from gambling for CFD events or on state time.

WHAT IS GAMBLING? (RCW 9.46)

Gambling activities involve three elements:

- Chance (luck or chance determines winner, not skill)
- Prize (the item a winner receives at the end of the game)
- Consideration (purchasing of an item by the player; do I need to pay to get in?)

If one of the three gambling elements is removed, it is no longer gambling. Examples:

- Entry into a contest is free (no consideration)
- Winners are chosen based on their skill (not chance)

WHAT IS A RAFFLE? (RCW 9.46.0277)

A raffle is a gambling activity where tickets are sold and prizes are awarded based on chance. Records must be kept for one year from raffles.

- Tickets must be consecutively numbered or printed with letters or symbols that don't repeat.
- No free tickets or tickets as gifts.
- Tickets must be sold for the same price (tickets must be of equal value, price break)

EXAMPLES:

- Door Prize: You are holding an event where you hand out door prize tickets. The event has a suggested donation of \$10. Regardless of suggested donation, every individual that comes through the door must receive a door prize ticket. The door prize winner is chosen at random by a drawing. It is chance that an individual wins. The winner receives a prize. Since you have eliminated consideration by giving everyone a door prize ticket, this is no longer gambling.
- March Madness Fundraiser: March Madness Sheets are distributed to the office; Players advance based off of the play of each participating team; The winner decides what charity the fundraiser dollars support. PRIZE is removed = THIS IS NOT GAMBLING
- Ring Toss Game: Each guest must buy entry to participate; Skill determines winner; Each winner receives a prize. CHANCE is removed = NOT GAMBLING
- Bingo: Each player buys a bingo card to play; Chance determines winner; The winner receives a prize. CONSIDERATION, CHANCE and PRIZE exist = THIS IS GAMBLING

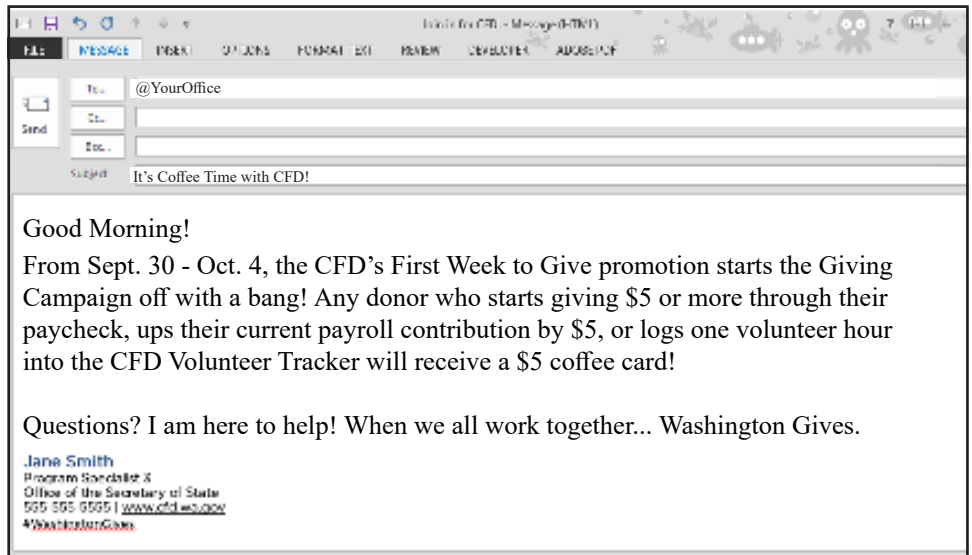
CAN I HAVE AN AUCTION?

Auctions are not gambling because the winner is the highest bidder (chance is removed). This includes silent auctions and "live" auctions where bids are called out. Anyone can offer an auction.

- Silent Auction: Track the bids with a bid sheet, this should also have the total value of the item(s) present.
- Live Auction: Track bids with a sheet with the assigned numbers and peoples names. Have your team watch the crowd and help the announcer.

TIPS AND TRICKS

- Did you know you can use the First Week to Give to help introduce payroll to your office? Check out our example! (Right)



- Don't do this alone! Recruit volunteers to help assist in planning, gaining support, collecting items if needed, and running the event.

- Planning. It is important! Not just for your team but for your management and if you have requests for the CFD staff we need to know a month ahead.

- Get your events on your agency's public calendar. This helps everyone to remember and plan accordingly

- Space out events, having too many back-to-back can create donor fatigue. Consider what is going on in your office space that week.

- Search for your CFD Member Charity at www.give.wa.gov/search

- Or by categories, city, county, or by keyword.

- Less is more! When searching for a charity keep it more simple

- Click here to start logging your hours!

- Then follow the next steps!

*Note: You can log into your myCFD account, and add hours there too! Agencies will be rewarded for logging the most volunteer hours during the campaign year at the annual CFD Recognition Event.

FUNDRAISER IDEAS

Below are some fundraising and activities for you and your team to consider for your own agency fundraiser:

- Snack Cart
- In-Kind Donation Drives: Clothing/ Blanket/Shoe/Food Drives
- Coin Jar Collection and Contests
- Chili/Cake/Cookie/Pie/Cook Offs/Bake Offs
- Dining for Dollars
- Brown Bag/Meeting Presentations
- Pizza/Spaghetti/Taco/ Breakfast/ Lucheon/Baked Potato Feed
- Holiday or Themed Potlucks
- Cat Cafe
- Blog or Intranet Info page
- Holiday or Themed Potlucks
- Cat Cafe
- Blog or Intranet Info page
- IT Pop Up Shop
- Charity Tour
- Putt Putt Golf Tournament
- Carnival
- Wreath and Swag Sale
- Trivia Contest
- Photo Contest
- Tabling/Bulletin Boards/Posters/General Outreach
- Silent Auction
- Media Sale (Books/CDs/Movies)

Planning and executing a fundraising event can be hard work. Here are some things to think about when attempting to make a fun and inspiring gathering.

Event Description, what type of fundraiser are you holding?

Who is your audience? Who is your target audience, who is able to come?

When are you holding your event? Is it a good time for your audience?

Where is event being held? Are there fees?

What does the audience care about? Should you hold it in-person, online, charity speaker, leadership speaker?

GET IN CONTACT

Do you have questions about the Combined Fund Drive? Or maybe want to run an idea about a fundraiser first? Feel free to call anytime!

Hours: Monday - Friday | 8:00 AM - 5:00 PM

E-MAIL ADDRESS

E-mailing the CFD is the best way to keep in touch and ask questions. This way not only do we have a record, but we can clarify any questions you may have.

cfd@sos.wa.gov

PHONE NUMBER

Do you know any retirees looking to donate? Have them give us a call! If you have questions about a fundraiser and would like to make sure it is possible, give the CFD a call!

(360) 902-4162

MAILING ADDRESS

Send your pledge forms, and any fundraising checks to the CFD at this address:

Attn: Combined Fund Drive
PO BOX 40250
Olympia, WA
98504-0250