

Annual
PLAN
2017



WASHINGTON STATE
COMBINED
FUND DRIVE

2017 Annual PLAN

This Annual Program Plan is for the purposes of executing the 2017 Combined Fund Drive (CFD) Annual Charitable Giving Campaign and is adopted by the Outreach and Executive Services Deputy Director and the Secretary of State. This Annual Program Plan focuses on a one-year period (January 1, 2017 – December 31, 2017) and consists of a set of operational objectives and methods proposed to achieve these goals.

The Combined Fund Drive's operational objectives include:

GOAL #1

Work with higher education institutions to build teams and infrastructure that supports improved and sustainable giving campaigns on campus.

GOAL #2

Retain more donors upon retirement from state government by adopting and building new retiree policies and procedures.

The achievement of these program objectives is conditional upon appropriate financial resources, current Washington State government employment trends and the following program segments:

- Donor outreach
- Marketing and communications
- IT operations
- Business development and community outreach
- Volunteer outreach
- Policy development

Supplemental pieces of this plan:

- The 2016 financial picture
- An operating budget for 2017
- A list of 2017 marketing events, promotional items and initiatives

Progress in achieving these objectives will be evaluated at each meeting of the CFD Advisory Council, which meets quarterly. A final analysis will occur at the end of the 2017 campaign.

Please note that these program objectives do not account for unforeseen budget cuts or changes in statewide agency operations.

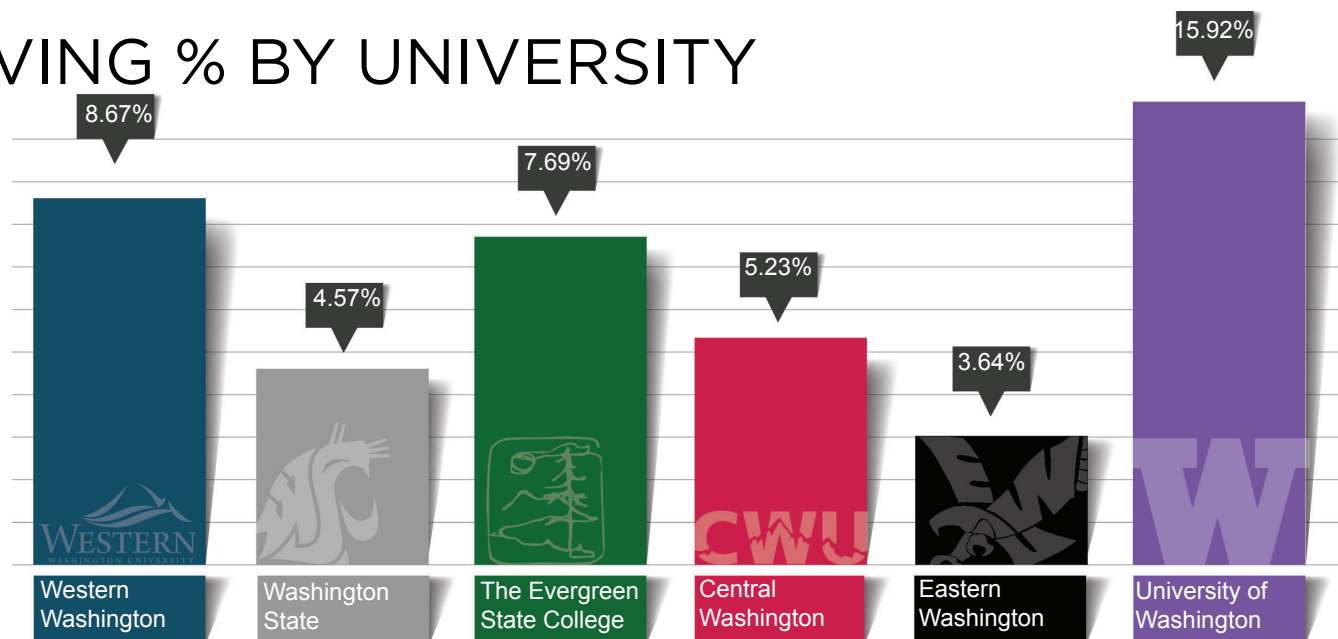
GOAL #1

Work with higher education institutions to build teams and infrastructure that supports an improved and sustainable giving campaign on campus.

Though the CFD Annual Giving Campaign has maintained consistent levels of success across the state, the higher education sector continues to struggle. These declines can be attributed to a number of factors:

- Lack of a leadership education and/or support
- Lack of a cohesive partnership between the school foundation and the CFD
- Inability to build working volunteer teams
- Unfocused campaign efforts that do not brand campaigns effectively on campus

GIVING % BY UNIVERSITY



To address these issues, the CFD proposes the following actions during the 2017 Annual Giving Campaign:

- Target a specific set of schools that show potential or have infrastructure in place that might support charitable giving campaigns
 - Central Washington University
 - Eastern Washington University
 - Washington State University
 - The Evergreen State College
 - Western Washington University
 - Spokane Community Colleges
- Schedule a visit with the President of each targeted school and Secretary of State Kim Wyman
- Present tangible statistics showcasing importance of giving and participating in CFD
- Work with universities to craft a plan that would make CFD successful on campus
 - Encourage localizing and branding campaign with school colors and marketing themes
 - Devise a plan for volunteer recruitment
 - Appoint an Executive Sponsor
 - Appoint a main campaign volunteer
 - Recruit volunteers from each department
 - Work to train employees with school-specific materials

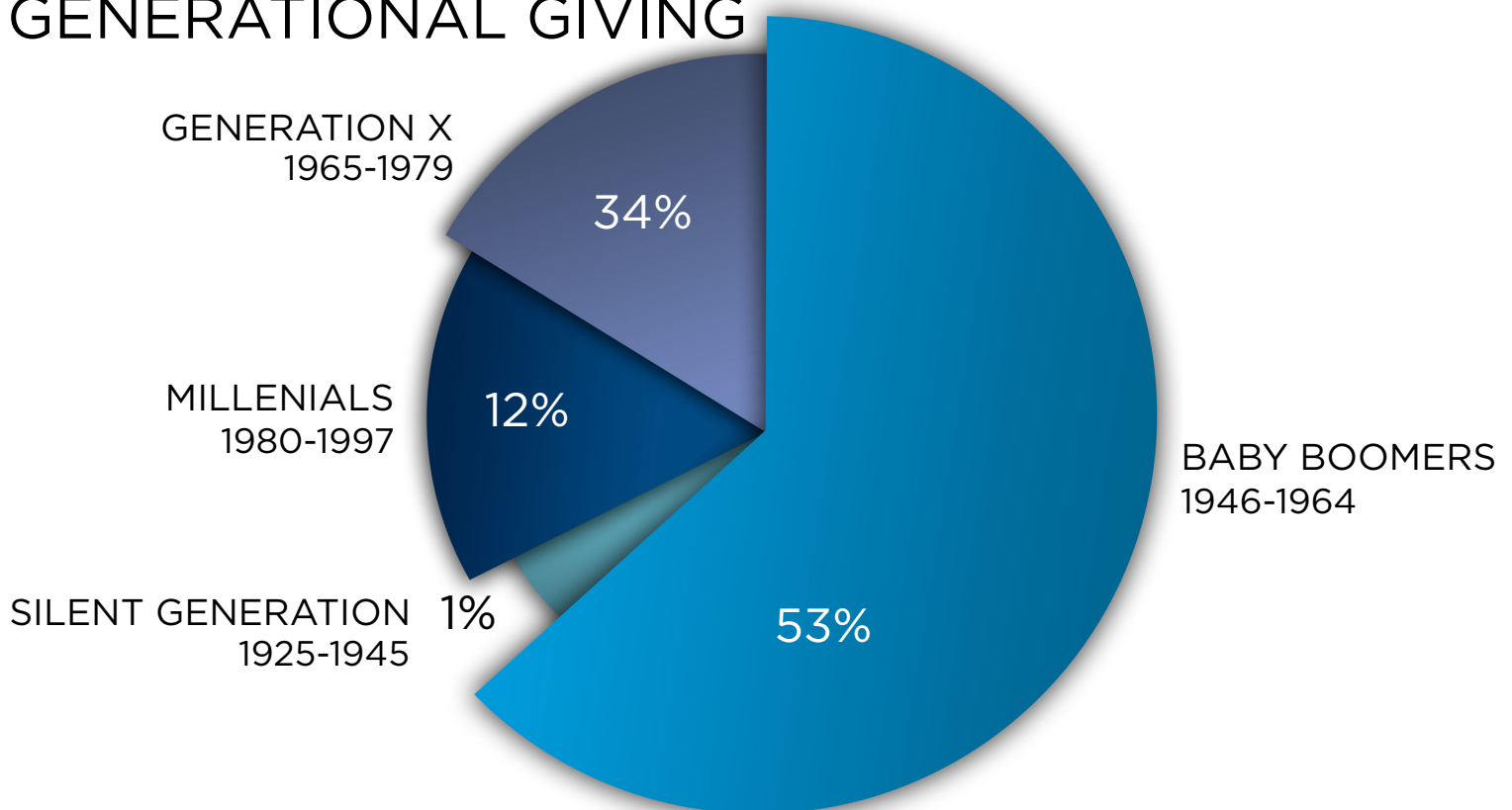
GOAL #2

Retain more donors upon retirement from state government by adopting and building new retiree policies and procedures.

The CFD non-specified fund is crucial to program operations because all administrative costs are taken from this account first, drastically lowering the costs for member charities and keeping the program competitive with other giving options.

Recent research shows that more than 55% of the total donors who give and 35% of the donors who are currently giving to the non-specified fund through their paychecks are 60 years or older. This means the bulk of those donors who help the program deflect costs will be leaving state government within the next five years.

GENERATIONAL GIVING



Current Retiree Giving Policy

The CFD allows retired state and higher education employees who receive benefits from the Department of Retirement Systems (DRS) to give through their benefits checks to the charity of their choice.

Previous policy allowed for the retiree to “opt-in” to giving to their charities. This policy has brought up three major issues:

1. There is no effective mechanism of communication in place to inform current active employees that their donations can continue into retirement if they choose.
2. When a retiree decides to continue giving, the current procedure does not begin their donations in retirement right away.
3. The CFD has no effective way to currently identify which donors become inactive in the CFD system because of retirement, or which simply separate and collect no benefits.

New Policy Proposal:

In order to solve these problems, the CFD and DRS have agreed on the following changes to the policy on retiree donors:

- All donations made by an active employee will carry over into retirement
- The donor can choose to “opt-out” at any time

Short Term Solution

While the OSOS Contracts Manager works with DRS to achieve a valid data sharing agreement, the CFD will move forward with the new retiree giving policy:

1. Any state employee who falls into the following categories will qualify:
 - An employment start date of 4/1/1992 or earlier
 - A birth date of 4/1/1962 or earlier
 - An inactive date within the last seven days of the report
2. After isolating these donors, a new profile will automatically be created as a DRS SYSTEM RETIREE with matching donations from the donor’s active account.
3. CFD will be sent a report each week that contains the following information for the transferred employees:
 - Donor name
 - Last agency worked
 - Email address
 - Inactive date
4. A new module will be set up in the CFD system that contains all new DRS SYSTEM RETIREES so that CFD staff can verify the information
5. DRS is sent the PAYLOAD FILE with new information or CFD sends the PAYLOAD FILE for DRS to pick download and review
6. DRS verifies donor identity and retirement eligibility and collects the money from the donor’s retirement check
7. After verification and collection, DRS sends CFD the new ACTUALS file
8. CFD staff reconciles and disburses the funds based on the donor’s request

Long term Procedure Proposal:

The CFD would like to propose the following procedure moving forward:

1. DRS sends data file every month to CFD of pending retirees
2. CFD system creates a donor retiree profile and donation information
3. CFD sends payload file with new donations to be collected by DRS
4. DRS collects money from donor pensions

Communication:

This is a major change from CFD policy, so communication to retiring CFD donors of the program will be key. The CFD will work to communicate to its current donors using the following methods:

- An email from the Program Manager to all donors currently giving through the CFD
- A letter from the Program Manager and retiree giving pamphlet to all donors that have reached the average years of service (35) and/or retirement age (62)
- An informational article written for all DRS publications sent to retirees from DRS
- Addition of this new policy in the DRS retirement orientation package

Effective Date:

To allow for a proper communication plan to be created and implemented, establish effective timelines for both CFD and DRS, and ensure that all procedures will work correctly. The effective start date of this new policy and procedure will be April 1, 2017

MARKETING AND COMMUNICATIONS

A huge part of what keeps the CFD successful is strong marketing. The 2017 Annual Charitable Giving Campaign will have a special tie to those who receive services from the charities in the CFD.

The statewide CFD theme will be:



Content

Promotional content will have a personal feel, telling the stories of those who have directly benefitted from services of charities in the CFD and the “heroes” that support them through payroll giving.

The theme will be incorporated in the following ways:

1. Printed materials
 - a. Large and small posters
 - b. Campaign rack cards
 - c. Charity Guides
 - d. Thank you cards
 - e. Contribution forms
 - f. “Hero” cards
2. Promotional materials
 - a. Branded notepads
 - b. Lanyards
 - c. Pens
 - d. Wristbands
 - e. Balloons
3. Web videos
 - a. Videos highlighting categories of services and charities that work within those categories
 - b. “In a World...” Leadership Breakfast video

Leadership Breakfast

The Leadership Breakfast has become a staple of the CFD Annual Giving Campaign, preparing agency leadership and volunteers for the year to come. This year will be provide special content, speakers and videos.

- Keynote speech
- Touching and emotional charity speakers

- Fun “In a World...” video

Events and Promotions

The CFD will continue to offer fun and easy events and promotions for all volunteers to use statewide.

- LNI Tee Off for Kids Golf Tournament (July)
- DOC Golf Tournament (August)
- ESD Softball Tournament (August)
- Football Kickoff Online Auction (Aug. 28 – Sept. 1)
- “Give 12” Blue Friday Challenge (Sept. 8)
- Run CFD (Sept.)
- Golf for Veterans Tournament (Sept.)
- First Week to Give (Oct. 2 - 6)
- Masquerade Ball (Oct. 21)
- Last Week to Give (Dec. 4-8)

Social Media and Electronic Communication

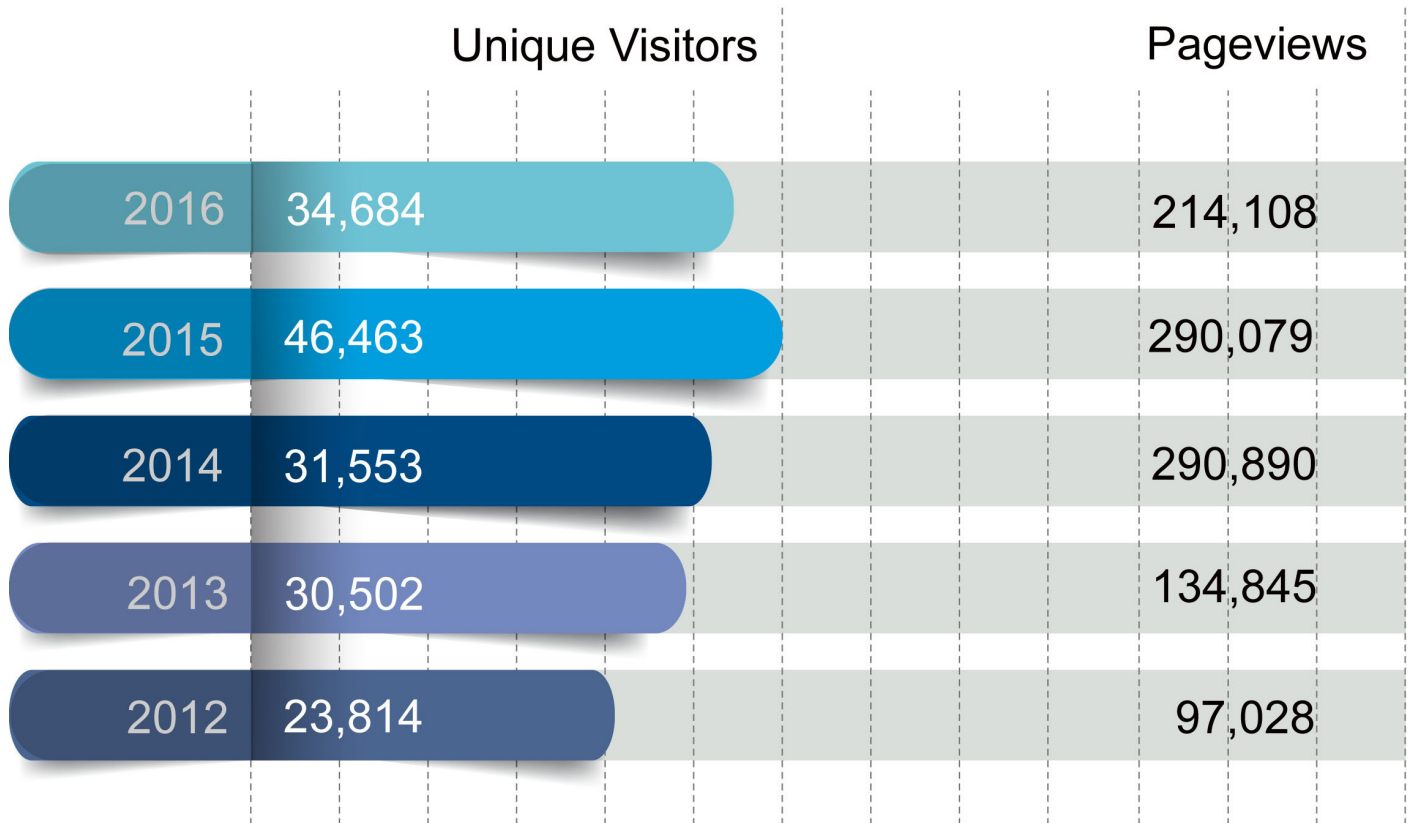
The CFD needs to take advantage of more free online social media opportunities by creating fun content and videos.

- Live tweet major events
- More Instagram
- Punchy, short videos
- Annual donor newsletters (pre and post-campaign)
- Email thanking CFD non-specified donors
- Heroic profiles on social media

IT DEVELOPMENT

In just five years, the CFD online system and webpage has become one of the most innovative public sector giving portals in the country. This fact has been highlighted by the number of page views and unique visitors, which has climbed exponentially since 2012.

WEB TRAFFIC SINCE 2012



To maintain this trend, the CFD needs to continue making innovations to its website and online functions.

New Content

To continue on the cutting edge of giving, the CFD will create new web content for each of its stakeholder

Update the Charity Application

The CFD plans on updating the current online charity application to provide more content for volunteers and donors to use, as well as additional information for charities.

- Ability to upload organization logos
- Opportunity to edit and modify federation members and programs from one profile
- Volunteer Match filter options
- Additional contact information for Executive and Development Directors
- More certification statements

Volunteer Match

The CFD would like to create a special web application that would allow donors to filter through a series of volunteer opportunities and find a suitable charity with whom to work.

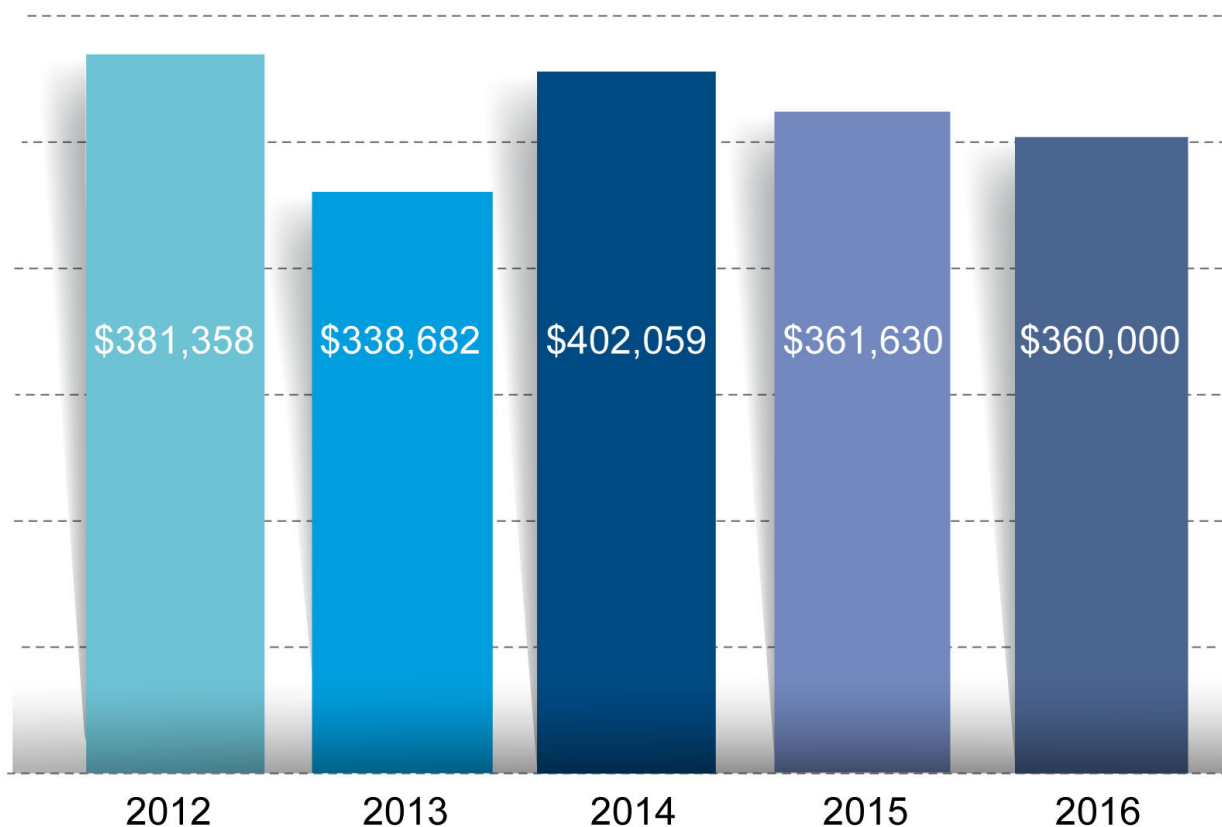
BUSINESS AND COMMUNITY

This CFD non-specified fund has consistently remained over \$350,000, keeping the administrative percentage charged to charities below ten percent.

As more donors retire or choose their own specified charities, the program's partnerships with outside businesses and community becomes important for two major reasons:

1. Sponsorship of events will help lower costs, bringing more funding to the CFD.
2. Stronger community relationships will help in promoting CFD events that are open to the public.

NON-SPECIFIED FUND TOTALS SINCE 2012



Maintaining Current Business Relationships

Continue relationships with the following sponsors:

- Twinstar Credit Union (\$10,000 general sponsorship, \$2,200 Seahawks ticket purchase)
- WSECU (\$7,500 First Week to Give sponsorship)
- Fred Meyer (\$500 gift card)
- Evergreen Direct Credit Union (Golf for Veterans sponsorship)

Provide New Events and Promotions for Sponsorship

In order to continue growing the CFD non-specified fund, the events that raise money for the program must be fun, innovate and interactive. The program will offer multiple packages for potential business partners to choose from:

- General campaign sponsorship packages
- Target event sponsorships
 - Golf Tournaments
 - Masquerade Ball
 - Silent Auction baskets
 - Wine Bar
 - Casino Night
 - Event sponsorship
 - Food
 - Beer keg donation
- Blue Friday
- First Week to Give
- Last Week to Give
- Small business flight plan

Community Groups

Business and community development aren't just about getting money and in-kind donations from local businesses. It's also important to creating a CFD brand in the public and creating fulfilling partnerships in the community.

Here are some groups the CFD should be a part of and participate in 2017:

- Thurston County Chamber of Commerce
- Lacey Chamber of Commerce
- Washington Non-profits
- South Sound Partners for Philanthropy

DONOR OUTREACH

The donors of the CFD have made Washington State's public giving program one of the most successful independent workplace contribution programs in the country. As the program moves forward, the challenge becomes maintaining the strong donor base that already exists while expanding to new and retiring donors.

Retaining Current Donors

In order to retain donors, the CFD will work tirelessly to recognize them for their contributions to their community. The program will also work to make sure its donors are well informed.

This can be accomplished through the following methods:

Donor Acknowledgement

- Craft a thank-you email to all donors who gave to the CFD non-specified in 2016.
- Distribute an annual tax email to ALL donors (except UW) with 2-15 donation information.
- Design and hang a thank-you banner hung on the Capitol Boulevard bridge in Olympia.

Donor Education

- Design and distribute an e-newsletter to all non-specified donors highlighting events that benefit CFD.
- Design and distribute an e-newsletter to all donors giving to any charity through payroll contribution.
- Create innovative and fun video content breaking down the "myths" of the CFD.

Getting New Donors

The challenge facing every charitable giving program is how to acquire new donors that replenish those who leave state government or retire.

The statistics are no different for the CFD in 2016:



The first way to attract more donors is to find out what would compel them to give (or what blocks them from giving) right now. The CFD will embark on the following projects to help become more informed about potential donors and their desires:

- Send a survey out to ALL state employees through the Office of the Governor.
- Coordinate and execute a series of focus groups based around Millennial state employees (the fastest growing segment of state government) finding out more about what connects them to charity.

New Employee Packets

Along with innovative and spirited fundraising events that will draw new donors in, the CFD also proposes the following actions:

- Meet with HR Directors
- Get in all new employee packets
- Create electronic content for new employees

VOLUNTEER OUTREACH

The Combined Fund Drive would not be able to operate without the tireless efforts of its many volunteers. Part of the operational duties of the state CFD office is to help facilitate trainings and provide our volunteers with tools to help raise funds for charities in their communities.

Training

The biggest key to success is educating its volunteers. Volunteer trainings happen in two phases – Campaign Leader Training in June and Local Coordinator Training in various counties in August and September. The CFD will also begin providing robust and interactive online training courses and materials in 2017.

Campaign Leader Training:

- Diversify speaker list, adding more voices in training
 - Gambling Commission Special Agent Q&A
 - Ethics Board Executive Director
- Have DSHS representative attend each training to meet other agency volunteers
- Add event planning and communication segment to agenda

Local Coordinator Training:

- Add the following trainings (potentially):
 - Chelan County
 - Clallam County
 - Grays Harbor County
 - Walla Walla County
 - Higher Education institutions (as needed)

Online Training

- Add a web-based training that allows volunteers to log in and interact with CFD staff
- Create online downloadable content for volunteers unable to attend any training
- Facebook Q&A sessions

Communication

Training isn't the only way to keep volunteers informed about the CFD. Communicating with each volunteer enhances the program and provides useful tools for all volunteers.

- Establish a timeline for communicating helpful information for volunteers prior to beginning of campaign.
- Establish a timeline for communicating with volunteers on a weekly basis during campaign.
- Continue to encourage localizing campaigns.
- Continue high quality customer service that CFD volunteers have become accustomed to.
- Conduct an end-of-the-year giving campaign survey for all volunteers.

POLICY DEVELOPMENT

Along with the planned program objective of working toward developing Volunteer Leave legislation, the CFD plans on additional policy changes during 2017.

WAC Edits and Additions

The CFD will be working with OSOS Legislative and Policy staff to amend the program WACs. Changes will include:

- Amending the process of disqualification and re-certification.
- Redefining eligibility to reflect current process.
- Adding language allowing CFD to conduct special campaigns and disbursements.
- Minor language and sentence structure changes.
- Adding more definitions of program materials.

Review and Edit Current CFD policies

Alongside WACs, the CFD also has a set of policies that help guide the program, protect our donors and assist charities in getting to know the program. Each year, these policies are reviewed by the Fiscal and Policy Coordinator and any changes that are proposed are approved by the Program Manager and Outreach Deputy Director. These policies that are currently listed on the website are:

- Closed, Delinquent and Merged Charity Policy
- Conflict of Interest Policy
- Discontinuation of Contact Policy
- Disaster Relief Policy
- Donor Privacy Policy
- Refund Policy
- Third Party Purchasing Policy

Ethics Board Opinions

Working with the Ethics Board is key to maintaining the tangible success of the CFD without overstepping key bounds. This year, the CFD will work with the Ethics Board to determine the following:

- Official status of Ethics Board Opinion 00-09
- Clarification on solicitation ethics rules
- Possible opinion on CFD during state time for donors (not just volunteers)