Administrative Policy No. 18.55

Subject: Combined Fund Drive

Information Contact: DSHS Human Resources

Authorizing Sources:
- Chapter 41.04.033 RCW
- Chapter 41.04.0331 RCW
- Chapter 41.04.0332 RCW
- Chapter 41.04.035 RCW
- Chapter 41.04.036 RCW
- Chapter 41.04.039 RCW
- Chapter 42.52 RCW
- Chapter 434-750 WAC
- Chapter 292-110 WAC

Effective Date: July 1, 2005

Revised: October 20, 2017 i Housekeeping update 2/12/18

Approved By: Original signed by David Stewart
Senior Director, Human Resources Division

Purpose:

This policy establishes the department process for employees to participate in charitable giving through the Combined Fund Drive.

Background:

The Combined Fund Drive (CFD):

- Is the only authorized formal solicitation of Washington State employees in the workplace on behalf of participating not-for-profit organizations;
- Is the only approved fundraising and collection of goods in-kind, such as food, clothing, and toys drives permitted in the agency;
- Lessens the burden of government and local communities in meeting the needs of human health and welfare;
- Provides a convenient channel through which state employees and public agency retirees may contribute to participating organizations providing services in Washington State and around the world; and
Minimizes the disruption in the state workplace and the cost to taxpayers caused by multiple charitable fund drives.

Scope

This policy applies to all DSHS employees and all activities associated with the workplace to raise and collect money or items for donation.

Definitions

CFD: Washington State Combined Fund Drive. The CFD is the Washington State workplace giving program for active and retired public employees to donate to local, national, and global charities. It is administered by the Washington Secretary of State’s Office. (SOS)

CFD Campaign: The annual period of organized solicitation of state employees and public agency retirees. This solicitation is conducted to obtain voluntary contributions, donations, and charitable commitments to approved not-for-profit participating organizations for the following year of contributions. Generally, the campaign is held from October 1 to December 15, although fundraisers and other events may be held throughout the year.

CFD Activities: Include all events that raise and collect money and items such as food, clothing and toys. Donations of items, not money, are ‘goods drives’ for purposes of this policy.

DSHS Campaign Leader: Appointed by the DSHS Secretary/designee to coordinate all DSHS CFD goals, plans, activities and volunteers. Serves as the DSHS liaison with the SOS and is responsible for reporting campaign results to the Secretary of State’s CFD office.

DSHS Campaign Executive: Assists the DSHS Campaign Leader with the DSHS CFD campaign.

DSHS Administration Campaign Co-lead: Represents a DSHS administration and serves on the DSHS CFD team. Assists in setting goals, plans and activities.

DSHS Local Coordinators: Represent a local office, division or institution for the DSHS CFD. Provides information to staff about the CFD and develops and/or implements local activities.

Participating Organization: A public 170 (c) (1) or private 501 (c) (3) not-for-profit organization whose application is approved by the CFD committee to participate in the CFD campaign.

Year of Contributions: The annual calendar year for collection of the voluntary payroll deductions for charitable contributions authorized by DSHS employees under this policy.

Policy Requirements

A. Campaign Staff and Volunteer Roles

1. Campaign Leader
a. Person(s) designated by their administrations to provide information about the CFD to the staff in their location.
b. Facilitates fundraising and other events in their locations to support the CFD.
c. Works with their administration Co-lead as needed.
d. In the absence of the Campaign executive assigns and tracks fundraisers and goods drives numbers.

2. Campaign Executive
   a. Provides administrative support to the DSHS CFD Campaign Leader.
   b. Maintains DSHS CFD data as needed.
   c. Works with the Administration Co-leads to ensure data accuracy.
   d. Assigns and tracks DSHS CFD fundraiser and goods drives numbers across the department.

3. Campaign Co-leads
   a. Appointed by each administration to serve on the DSHS CFD team to set goals, plans and implement activities.
   b. Responsible to work with their administration’s leadership to recruit local coordinators for each office location.
   c. Administration Co-Leads will provide the DSHS CFD Campaign Leader the names of employees who will serve campaign local coordinators to assist in the CFD campaign.

4. Local Coordinators
   a. Person(s) designated by their administrations to provide information about the CFD to the staff in their location.
   b. Facilitates fundraising and other events in their locations to support the CFD.
   c. Works with their administration Co-lead as needed.
   d. Those designated as Local Coordinators remain on the payroll of their employing organization during this assignment.

B Campaign Support

1. The DSHS Secretary/Designee may authorize the reasonable use of state resources to support, promote, and conduct the annual CFD campaign within their organization. Reasonable uses are not excessive in volume or frequency as determined by the Secretary.
2. At the discretion of the Secretary/designee, DSHS employees may be authorized to attend Secretary of State’s Office and DSHS CFD training, promotional and fundraising events on work time.
3. DSHS may establish local CFD campaigns within the geographical areas it covers, to include:
   a. Conducting promotional and fundraising events
   b. Providing training and recognition of local coordinators
   c. Identifying DSHS-specific themes.
   d. Developing marketing and communication plans for the campaign.
4. DSHS determines the time period of the agency's CFD campaign. Generally this is between October 1 and December 15, consistent with the SOS campaign. With management approval, some DSHS locations conduct fundraisers, goods drives and other events to support CFD charities throughout the year.

5. Local DSHS leadership may grant CFD Charities the opportunity to share information with DSHS staff about their organization during the campaign.

6. DSHS administrations are encouraged to support employees’ participation in all CFD efforts such as kickoffs, recognitions, goods drives and other fundraisers. Doing so promotes positive morale, wellness and community connectivity.

7. Staff must have equal access to the information about all CFD charities.

8. CFD solicitations of employees may be conducted during work hours using methods that ensure giving is voluntary and if desired, confidential as permitted by law.

9. Campaign kick-offs, recognition events, awards and other non-soliciting events build support for the CFD and are encouraged. CFD fundraising events such as, auctions, bake sales, carnivals, athletic events, or other activities not specifically provided for in these rules are permitted when approved in advance by DSHS management.

10. The following activities shall not be allowed for DSHS fundraising:
   a. Soliciting businesses for donations.
   b. Conducting raffles.
   c. Promoting sales of goods that benefit a non-registered CFD organization, group or individual.

11. Local coordinators and their respective volunteers are required to take Secretary of State and/or DSHS CFD on-line trainings.

12. The opportunity to serve as a DSHS CFD Co-leader and Local Coordinator develops leadership, communication, project management and teamwork skills which benefit the employee, their work unit and the agency’s morale.

C. Contributions:

1. Employees may contribute to the CFD using payroll deduction, checks, money orders, cash, or electronic methods.

2. Employees may receive, upon request, a receipt for in-kind or goods drive donations.

3. Employees may use work time to sign up for on-line payroll deductions through www.cfd.wa.gov.
4. Employees using paper contribution (pledge) forms must send the form to the DSHS CFD office at MS 45018 for processing.

5. Authorized participation in DSHS CFD fundraising or goods drives is allowed on state time, using state resources.

D. Handling and Depositing Contributions

1. The Campaign Leader, in conjunction with the Campaign Executive and Co-Leads develops procedures and processes for the collection and processing of contributions collected through fundraisers and in-kind goods drives.

2. DSHS employees must follow all written procedures for the collection and processing of contributions collected through fundraisers and in-kind goods drives.

3. Contributions from fundraisers must be deposited into the SOS CFD account in the custody of the State Treasurer according to state laws.

4. All DSHS fundraising and in-kind goods collection activities must request and receive an event number from the DSHS Campaign Leader or Campaign Executive prior to conducting the event.

5. On-line contributions are encouraged for on-going, time-limited and one-time donations, including fundraisers. This method minimizes the risks associated with cash handling and maximizes benefit to charities.

1 Updated Campaign Leader under A.1