



**UTAH COUNTY GOVERNMENT
OFFICE OF PERSONNEL MANAGEMENT**

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The Board of Utah County Commissioners approved a policy for charitable solicitation of Utah County Government employees for contributions through payroll deduction. A copy of the policy is attached and is posted on the County website. The policy allows for a four week solicitation period to commence on the first Monday in May of each year. If a charity is designated for participation and reaches the required employee participation level, payroll deductions will begin with the first payday in July.

In order to be designated as a participating charity in the County charitable contribution campaign, the charitable organization must submit a letter of application to the Personnel Director on or before April 10, 2015. The charity must certify in its application that it meets certain standards and conditions outlined in Section 5.b of the policy.

If you wish to be considered for participation in Utah County's 2015 charitable campaign, please submit the required application materials to our office no later than 5 PM on Friday, April 10, 2015.

If you have any questions or need further information, please feel free to contact my assistant, Jane Ivie, at 801-851-8164. We look forward to involving our employees in supporting the fine charitable organizations in our community.

Sincerely,

Lana F. Jensen, Director - Office of Personnel Management

UTAH COUNTY GOVERNMENT POLICY FOR CHARITABLE SOLICITATION OF
COUNTY EMPLOYEES THROUGH PAYROLL DEDUCTIONS

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1. PURPOSE:

The County Commission finds that it is in the County's interest to promote charitable contributing by County Employees. In order to support and encourage such contributions, simplify the process for the County, and reduce disruption of the workplace and pressure on employees, the County adopts the following procedures. In adopting this policy, it is the intent of the County to establish a single County charitable campaign for each year, and provide guidelines and standards governing the activities of charitable organizations that wish to solicit contributions from County employees.

2. APPLICABILITY:

This procedure shall be applicable to and binding upon any organization or entity, which seeks to solicit charitable donations from County employees as a group through payroll deduction. The procedure shall not apply to the activities of employee organizations or labor groups, banks and other financial institutions, insurance companies, and commercial solicitations by businesses for profit, nor shall it apply to solicitation activities not contemplating payroll deduction.

3. COUNTY CHARITABLE CAMPAIGN MANAGER:

- a. The Personnel Director, or designee, shall serve as the County charitable campaign manager and shall have the responsibility for the implementation of this policy and procedure and for the supervision of County charitable campaign activities.
- b. The Personnel Director, or designee, shall review applications from charitable organizations for solicitation access to County employees and make the initial determination of whether such access shall be granted, by the application of the standards and requirements set forth herein.
- c. The Personnel Director may instruct staff to develop form applications if it determines that such would be appropriate.
- d. All application letters and accompanying materials shall be kept by the Personnel Department in accordance with County records retention schedules.

- e. The Personnel Director, or designee, shall function as the clearinghouse or umbrella for all charitable entities and organizations wishing to solicit charitable donations from County employees as a group through payroll deduction.
- f. The Personnel Director, or designee, shall oversee the solicitation of contributions from County employees during the charitable campaign, coordinate the receiving and review of payroll deduction forms completed by employees, and forward said forms to the appropriate personnel technician(s) as soon as possible. The employee's designated amount of contribution should be indicated on a per pay period deduction basis.

4. COUNTY CHARITABLE CAMPAIGN:

- a. Access to and solicitation of County employees, as a group and for donations through payroll deductions, shall be conducted during a four-week period, to commence on the first Monday in May of every calendar year. Any access to and solicitation of County employees must be approved by the Personnel Director, or designee. No payroll deduction charitable solicitations shall occur other than during this four-week period (with the exception at new hire orientation).
- b. New payroll deduction forms completed by employees during the charitable campaign will commence and be effective pay period 14 and will continue until changed by the employee. However, County employees may change and/or eliminate their payroll deductions for charitable organizations at any time during the calendar year.
- c. Participating charities and umbrella organizations are responsible for all fund-raising administrative costs and an allowance for uncollectible pledges associated with the County charitable campaign.
- d. Participating charities must have at least 20 full time County employees pledged to provide donations through payroll deduction at the end of the four-week solicitation period in order to continue participating in the County charitable campaign. In addition, participating charities must also have at least 20 full time County employees continuing to provide donations through payroll deduction at the end of each year of participation in order to continue participating in the County charitable campaign. These obligations may be met by an umbrella organization having at least 20 full time County employee donors, regardless of the number of donors per constituent charity. If a charity is unable to either secure at least 20 full time County employees pledged to provide donations through payroll deduction at the end of the four-week solicitation period, or maintain at least 20 full time County employees continuing to provide donations through payroll deduction at the end of each year of participation, then the charity shall lose its certification to participate in the County charitable campaign and may not reapply for admission to the County charitable campaign for three (3) years.

5. APPLICATION AND REQUIREMENTS:

- a. In order to be designated as a participating charity in the County charitable campaign, a charitable organization must submit a letter of application to the Personnel Director, or designee, on or before April 1 of every year it seeks to participate in the County charitable campaign. An umbrella organization may submit a single application on behalf of all its constituents, affirming that each constituent meets the same qualifications.
- b. In order to be designated as a participating agency in the County's charitable campaign and be permitted to solicit County employees for charitable donations by payroll deduction, each applicant charity shall meet the following standards and conditions and certify that it does so in its application to the Personnel Director, or designee:
 - i. The charity must agree to operate in compliance with all applicable Federal, state and local laws, including any applicable city or county licensing or certification requirements.
 - ii. The charity must agree to operate under currently valid articles of incorporation and by-laws, a copy of which shall be submitted with its application.
 - iii. The charity shall hold and maintain a currently valid designation by the Internal Revenue Service as a 501(c)(3) organization and be eligible to receive tax deductible contributions under the Internal Revenue Code and shall provide a copy of such designation as part of the application submitted.
 - iv. The charity must be licensed to engage in charitable solicitation by the State Division of Consumer Protection under the provisions of Utah Code Ann § 13-22-1, et seq. (as amended) and shall provide a copy of the license as part of the application submitted.
 - v. The charity must submit a copy of its Form 990 filed with the IRS for its most recently completed fiscal year, or file a copy of its audited financial statement for each such year, or if neither of those documents are available, shall provide a copy of its most recent financial report, approved by its board of directors.
 - vi. The charity shall maintain a substantial presence in Utah County by maintaining a staffed facility accessible by the charity's clients or the public for at least 20 hours each week. An umbrella organization may meet this obligation on behalf of its constituents.

- vii. The charity shall not expend in excess of 25 percent of its gross revenues in fund-raising or administrative expenses.
- viii. The charity shall have a majority of its governing body serving without compensation.
- ix. The charity shall agree to make available to the County, upon request, its annual financial report.
- x. Donations directed to a charity shall be paid to coincide with County payroll dates. Amounts will be deposited directly to the charity through wire transfer, unless otherwise agreed upon.
- xi. The charity shall not engage in or promote partisan political parties, activities or candidates.
- xii. An umbrella charitable organization that has one or more constituent charities that do not meet these standards must agree to not permit that constituent to participate in the County charitable campaign nor may it receive payroll deduction donations for that constituent. An umbrella organization must further agree to permit designated donations to a particular constituent charity.

6. HEARINGS AND APPEALS:

- a. A charity that submits an application for participation in the County charitable campaign, which application is denied by the Personnel Director, or designee, shall be notified by the Personnel Director, or designee.
- b. The charity may, within fifteen (15) calendar days of the denial, submit a written petition for reconsideration to the Board of County Commissioners of Utah County. A copy of the petition should be submitted to the Personnel Director, or designee.

7. COUNTY OFFICERS AND EMPLOYEES:

- a. County officers and employees are directed to cooperate with the Personnel Director, or designee, in its functions under this policy to promote the efficient conducting of the County charitable campaign, to ensure that employee participation in the campaign is clearly voluntary, and to reduce disruption of the workplace.
- b. It is the intent of this policy to keep to a reasonable minimum the expenditure of County resources, including compensated County employee time used on the County charitable campaign.