

SALT LAKE COUNTY
COUNTY-WIDE POLICY
ON
CHARITABLE SOLICITATION OF COUNTY EMPLOYEES

Purpose -

The County Council 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.

1.0 Policy

- 1.1 Application-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.
- 1.2 Charitable Campaign Coordinator
- 1.3 The Division of Human Resources shall serve as the County charitable campaign manager and shall have responsibility for the implementation of this policy and procedure and for the supervision of County charitable campaign activities.
- 1.4 The Division of Human Resources shall make a recommendation annually, to the Mayor regarding the assignment of an employee to serve as the county's Charitable Campaign Coordinator.
- 1.5 Upon submittal by the Charitable Campaign Coordinator, the Division of Human Resources 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.
- 1.6 The Division of Human Resources shall review for approval any requests for charitable activities conducted on County time and premises that do not involve payroll deductions, such as food drives.
- 1.7 All application letters and accompanying materials shall be kept by the Division of Human Resources for future reference.

2.0 County Charitable Campaign

- 2.1 Access to and solicitation of County employees, as a group and for donations through payroll deductions, shall be conducted during a six-week period, to occur in the Autumn of every calendar year. The specific period shall coincide from year to year with the annual Benefits Fair. No payroll deduction charitable solicitations shall occur other than during this six-week period (with the exception at new hire orientation) .
- 2.2 The Charitable Campaign Coordinator 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
 - 2.2.1 The Charitable Campaign Coordinator shall organize and administer the solicitation of contributions from County employees during the charitable campaign, coordinate the receiving and review of payroll deduction source sheets completed by employees, and forward said forms to appropriate payroll technicians as soon as possible.
 - 2.2.2 The payroll technicians will then forward the completed payroll deduction source sheets to the Charitable Campaign Coordinator by December 1.
 - 2.2.3 The Charitable Campaign Coordinator is responsible for verification that the completed payroll deduction source sheets have been completed correctly. The employee's designated amount of contribution should be indicated on a per pay period deduction basis.
 - 2.2.4 Any requested tracking of percentage participation, increase/decrease in participation, etc., is to be completed by the Charitable Campaign Coordinator prior to the payroll deduction source sheets being forwarded to the Auditor's office payroll administrator for processing by January 5.
- 2.3 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.

3.0 Charitable Solicitation Requirements

- 3.1 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 Division of Human Resources on or before June 30th 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.
 - 3.1.1 The Division of Human Resources shall make every effort to assist charities in their applications, permitting charities to amend and resubmit applications, where necessary, to the end that participation shall be encouraged and open to all legitimate charities.

- 3.1.2 The Division of Human Resources may instruct staff to develop form applications if it determines that such would be appropriate.
- 3.2 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 Division of Human Resources:
 - 3.2.1 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.
 - 3.2.2 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.
 - 3.2.3 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.
 - 3.2.4 The charity must have been licensed to engage in charitable solicitation by the State Division of Consumer Protection under the provisions of '13-22-1, et seq. (U.C.A. 1953, as amended).
 - 3.2.5 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.
 - 3.2.6 The charity shall maintain a substantial presence in Salt Lake County, defined as 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.
 - 3.2.7 The charity shall not expend in excess of 25 percent of its gross revenues in fund-raising or administrative expenses; provided, however, that this requirement may be waived by the Mayor for good cause shown, upon the written petition of the charity.
 - 3.2.8 The charity shall have a majority of its governing body serving without compensation.
 - 3.2.9 The charity shall agree to make available to the County, upon request, its annual financial report.

- 3.2.10 The charity must have at least 40 County employees providing donations through payroll deduction. This obligation may be met by an umbrella organization having at least 40 employee donors, regardless of the number of donors per constituent charity. A charity that makes its initial application to the County will not have to meet this obligation until the end of its first full year of operation. If, after the first year, the charity is unable to secure donations from 40 County employees, it shall lose its certification to participate in the County charitable campaign.
 - 3.2.10.1 A charity or umbrella organization that fails to meet this requirement may not reapply for admission to the county campaign for three (3) years.
 - 3.2.10.2 Donations directed to a charity that fail to meet this requirement shall still be forwarded to the charity.
 - 3.2.10.3 Donations directed to a charity shall be paid on a twice monthly basis, coinciding with the county payroll dates. Amounts will be deposited directly to the charity through wire transfer, unless otherwise agreed upon.
- 3.2.11 The charity shall not engage in or promote partisan political parties, activities or candidates.
- 3.2.12 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.

4.0 Hearings and Appeals

- 4.1 A charity that submits an application for participation in the County charitable campaign, which application is denied by the Division of Human Resources, shall be notified by the Charitable Campaign Coordinator within ten days of denial.
 - 4.1.2 The charity may, within thirty days of the denial, submit a written petition for reconsideration by the Mayor. Such petition should be submitted to the Division of Human Resources through the Charitable Campaign Coordinator.

5.0 County Officers and Employees

- 5.1 County officers and employees are directed to cooperate with the Division of Human Resources in its functions under this policy and with the Charitable Campaign Coordinator to promote the efficient conducting of the campaign, to ensure that employee participation in the campaign is clearly voluntary, and to reduce disruption of the workplace.

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- 5.2 The Charitable Campaign Coordinator must agree to endeavor to keep to a reasonable minimum the expenditure of County resources, including compensated County employee time used on the County charitable campaign.

APPROVED and PASSED this 15 day of July, 2008.

SALT LAKE COUNTY

Michael Jensen, Chair

ATTEST:

Sherrie Swensen, County Clerk

APPROVED AS TO FORM:

District Attorney's Office Date