



CITY OF OREM

OFFICE OF THE CITY MANAGER

56 North State Street, Orem, UT 84057

(801) 229-7035

February 19, 2015

Dear Sir or Madam,

The Orem City Manager's Office approved a policy for charitable solicitation of City of Orem employees for contributions through payroll deduction. A copy of the policy is enclosed and is posted on the City's website. If a charity is designated for participation and reaches the required employee participation level, payroll deductions will begin with the beginning of the new contract year or the pay period immediately following employees' declarations.

In order to be designated as a participating charity in the City of Orem Charitable Campaign, the charitable organization must submit a letter of application to the Human Resource Office on or before the end of February each year. The charity must certify in its application that it meets certain standards and conditions outlined in Section 4.b. of the aforementioned policy.

If you wish to be considered for participation in the City of Orem's 2015 campaign, please submit the required application materials no later than 5 p.m. on Friday, February 27, 2015. If you have any questions or need further information, please feel free to contact me or my assistant, Kristie Snyder, at 801-229-7035. We look forward to involving our employees in supporting the fine charitable organizations in our community.

Sincerely,



Brenn Bybee

City of Orem | Assistant City Manager

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Charitable Campaign Procedures for the City of Orem

February 1, 2015

1. PURPOSE

The City of Orem finds that it is in the City's interest to promote charitable contributing by City employees. In order to support and encourage such contributions, simplify the process for the City, and reduce disruption of the workplace and pressure on employees, the City adopts the following procedures. In adopting this policy, it is the intent to establish a single organization wide charitable campaign for each year, and provide guidelines and standards governing the activities of charitable organizations that wish to solicit contributions from employees. This policy shall not apply to the activities of employee organizations or labor groups, nor shall it apply to solicitation activities not contemplating payroll deduction.

2. RESPONSIBILITY

- a. The Assistant City Manager shall serve as the charitable campaign manager (hereinafter "Campaign Manager") and shall have the responsibility for the implementation of this policy and procedures and for the supervision of charitable campaign activities.
- b. The Campaign Manager shall review applications for charitable organizations for solicitation access to City Employees and make the initial determination of whether such access shall be granted by applying the standards and requirements set forth in this policy.
- c. All applications and accompanying materials shall be kept by the Human Resource Office in accordance with City records retention schedules.
- d. Under the direction of the Campaign Manager, the Human Resource Office shall oversee the solicitation of contributions from employees during the charitable campaign, coordinate the receiving, reviewing, and processing of payroll deduction authorization forms completed by employees, and forward said forms to the appropriate Human Resource staff as soon as possible. The employee's designated amount of contribution should be indicated on a per pay period deduction basis.

3. CHARITABLE CAMPAIGN STRUCTURE

- a. Access to and solicitation of employees, as a group and for donations through payroll deductions, shall be conducted once per year. No other payroll deduction charitable solicitations shall occur (with the exception at new hire orientation). Any access to and solicitation of City employees must be approved by the Campaign Manager.

- b. New payroll deduction authorization forms completed by employees during the charitable campaign will commence at the beginning of the new contract year or the pay period following the employee's declaration and will continue until changed by the employee. However, employees may change and/or terminate their payroll deductions for charitable organizations at any time.
- c. Participating charities and umbrella organizations (which includes but is not limited to federations) are responsible for all fundraising administrative costs and an allowance for uncollectible pledges associated with the charitable campaign.
- d. Participating charities must have at least 40 full time employees pledged to provide donations through payroll deduction at the end of the solicitation period in order to continue participating in the charitable campaign. In addition, participating charities must also have at least 40 full time employees continuing to provide donations through payroll deductions at the end of each year of participation in order to continue participating in the charitable campaign. These obligations may be met by an umbrella organization having at least 40 full time employee donors, regardless of the number of donors per constituent charity. If a charity is unable to either secure at least 40 full time employees pledged to provide donations through payroll deduction at the end of the solicitation period, or maintain at least 40 full time employees continuing to provide donations through payroll deduction at the end of each year participation, then the charity shall lose its certification to participate in the campaign and may not reapply for admission for three (3) years.

4. APPLICATION AND REQUIREMENTS

- a. In order to be designated as a participating charity in the City charitable campaign, a charitable organization must submit an application to the Campaign Manager on or before February 20th or every year it seeks to participate in the City 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. **Charity Participation Criteria** In order to be designated as a participating charity in the City's charitable campaign and be permitted to solicit City employees for charitable donations through payroll deduction, each applicant charity shall meet the following standards and conditions and certify that it does so in its application to the Campaign Manager:
 1. **Broad Base of Service:** The umbrella organization must have a minimum of 10 member organizations that meet participation requirements.
 2. **Nonprofit Status and Organization:** 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 and shall provide a copy of such designation as part of the application submitted. The charity must operate under currently valid articles of incorporation and by-laws, a copy of which shall be submitted with its application.

3. **Registration:** 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.
4. **Financial Certification:** The charity must submit to the Campaign Manager a copy of its Form 990 filed with the Internal Revenue Service 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 is available, shall provide a copy of its most recent financial report, approved by its board of directors.
5. **Local Presence:** The charity shall maintain a substantial presence in Utah County by maintaining a staffed Utah County facility accessible to the public for at least 20 hours each week, with an active local volunteer board that exercises satisfactory administrative controls. When charities submit under an umbrella organization, a simple majority of charities in that umbrella organization must maintain a substantial presence in Utah County.
6. **Administrative Expenses:** The charity shall not expend in excess of 25 percent of its gross revenue in combined fund-raising/ administrative expenses. The umbrella organization must have satisfied this requirement for the previous two years and certify that its member organizations also meet this requirement.
7. **Annual Report:** The charity shall agree to make available, upon request, its annual program/financial report.
8. **Nondiscrimination:** The umbrella organization and its members must have a policy prohibiting unlawful discrimination, as defined by state and federal law.
9. **Non Designated Pledges:** Non designated pledges will be divided proportionately among the umbrella organizations, based on the present campaign giving designations.
10. **Advertising:** A listing of each umbrella organization, provided on the back of the pledge form, will be given to every employee that will include each individual agency name and website for employees to reference. No other charity literature will be allowed.
11. **Pledge Form:** A pledge form will be provided by the umbrella organizations or can be printed or placed online in house by the organization.
12. **Partisan Activities:** The umbrella organization/member charities shall not engage in or promote partisan political parties, activities, or candidates.
13. **Pledge Payments:** Donations directed to a charity shall be paid to coincide with the City's payroll dates. Amounts will be deposited directly to the charity through wire transfer.

5. **HEARINGS AND APPEALS**

- a. Any applicant that is denied participation in the City charitable campaign, shall be notified by the Campaign Manager of that denial.
- b. Within fifteen (15) calendar days of the denial, an applicant may submit a written petition for reconsideration to the City Manager.