



State Employees' Charitable Giving Campaign

Department of Administration
State Human Resources Division
P.O. Box 200127
Helena, Montana 59620-0127

2009 MONTANA STATE EMPLOYEES' CHARITABLE GIVING CAMPAIGN APPLICATION INFORMATION FOR FEDERATIONS

Welcome to the 2009 State Employees' Charitable Giving Campaign (SECGC). The Campaign is a service to state employees, who are very generous donors to non-profit organizations and to their communities. We welcome and encourage your participation.

As part of the service to employees, we must make sure that applying organizations meet the eligibility requirements of the campaign. The following information will assist you in the application process. For any questions, contact information is in sections VII and VIII below.

- I. **General Information.** This campaign is the only authorized charitable solicitation of state employees in the workplace. Through the campaign, state employees donate to a wide variety of non-profits using payroll deduction, checks or cash. In 2008, state employees donated more than **\$503,000**. While there were some non-profits that received no contributions, the largest gift was \$30,120, and the average gift was \$1,239.

The Department of Administration administers the campaign with assistance from an advisory council of volunteer state employees, a fiscal and a program contractor, and representatives of federations and independent participants.

- II. **Eligibility Requirements.** To apply for the 2009 campaign, each federation and affiliated non-profit must adhere to the following requirements.
- A. Each federation and affiliated non-profit must be, or be a program directly managed by, an organization that has tax exempt status granted by the IRS under 26 USC 501(c)(3) or has such status granted by an act of Congress.
 - B. Each federation must verify that it and all affiliated non-profits meet the following criteria. Each federation and affiliated non-profit must:
 - 1. Provide a complete Application and Agreement and Non-Profit Organization Information Form signed by the executive director or board chair.
 - 2. Submit a copy of the 501(c)(3) showing that it is, or is directly managed by, an organization in compliance with section II.A above.
 - 3. Provide written evidence that it is registered with the Secretary of State (SOS) to do business in Montana and which shows active status. This is available at <http://app.mt.gov/bes>.

4. Show that at least 70 percent of the funds raised from the campaign for each affiliated non-profit are used to benefit the people of Montana. If this is not the case, you must explain in writing to the satisfaction of the Department of Administration and the Campaign Advisory Council, how there is a substantial return or benefit to the people of the state.
5. Use the funds contributed by state employees for the purposes described in campaign materials.
6. Have a written policy and procedure of nondiscrimination in regard to race, color, religion, national origin, disability, age marital status or sex for the purpose of service, employment, membership or leadership.
7. Certify that your federation and each affiliated non-profit organization, accounts for its funds in accordance with generally accepted accounting principles.
8. Be directed by an active and responsible governing body whose members have no material conflict of interest and a majority of whom serve without compensation.
9. Conduct publicity and promotional activities based on your actual programs and operations.
10. Not have sectarian activities as the primary focus. This includes activities aimed at promoting one or more religious viewpoints. Sectarian activities that are only incidental to the primary focus will not necessarily cause disqualification.
11. Not share or sell names or addresses of state employee donors to anyone.
12. Provide a complete copy of the federation's most recent audit, including any attachments or addenda showing campaign distributions.

III. Application and Agreement. By signing the Application and Agreement, each federation and affiliated non-profit agrees:

- A. To certify that they meet the eligibility requirements in section II above.
- B. To indemnify the state, its officials, agents and employees as required in the Application and Agreement.
- C. To the selection, by the Department of Administration, of a Financial Services Coordinator and a Program Coordinator to act on your behalf and to be paid **by each non-profit and federation as described in number five of the application and agreement.**

IV. Approval to Participate and Appeals.

- A. The Campaign Advisory Council reviews all applications. The council recommends approval or denial to the Department of Administration. Applicants are notified of the outcome by regular or electronic mail.
- B. Applicants may appeal denial in writing within 10 working days to the Department of Administration at the same address used for applications. A decision on the appeal will be made within 10 working days.
- C. Approval for prior campaigns does not guarantee future eligibility.
- D. No organization or program may be listed more than once in the campaign materials. For example, if a program is listed under a Human Resources Development Council, it may not be listed under a United Way.

V. Conduct of the Campaign.

- A. Volunteer state employees conduct the campaign. Direct contact by organizations with employees is regulated to minimize workplace disruption and ensure equal access. Federations and affiliated non-profits may post materials on public bulletin boards indicating that state employees may donate through the campaign. Removing other organizations' materials will result in disqualification.
- B. Federations and affiliated non-profits may be asked to help with training, campaign promotion or other events.
- C. The campaign produces a single donor guide with information about all participating organizations and a single pledge card. Federations and affiliated non-profits may not distribute their own fundraising materials in the workplace.
- D. The Campaign Advisory Council sends thank-you letters to donors listing the donees and amount contributed and pledged.
- E. Employees may indicate on the pledge card whether or not they want donees notified of their gift.
- F. The campaign will not, without clear permission from the state employee, disclose his or her name, address, donation or any other information related to the campaign.

VI. Financial Information.

- A. The application fee for the 2009 campaign is \$60 per federation plus \$4 for each affiliated non-profit. For example, a federation with ten affiliates would pay \$100. This fee must be submitted with the application and is not refundable.
- B. State employees may designate contributions to your federation or affiliates. Undesignated contributions, campaign expenses and uncollectible pledges are allocated among all participants based on a percentage share of gross campaign receipts.
- C. The Financial Services Coordinator will pay all designated **cash contributions** by May 1, 2010, following the end of the campaign, less participants' share of projected expenses at that time. If May 1 falls on a weekend, the payment will be made on the prior business day.
- D. The Financial Services Coordinator will distribute all other **payroll deduction contributions, less participants' share of projected expenses**, no later than May 1, August 1 and November 1, 2010. Final payment is sent, less uncollectible and final expenses, within 10 working days following the campaign audit, but no later than March 15, 2011. The Financial Services Coordinator will send out a report on final distribution of campaign revenues and expenses.

VII. Department of Administration.

- A. The Department of Administration is the final authority in the interpretation of any rules, policy, contracts, eligibility and any other matters relating to the State Employees' Charitable Giving Campaign.

- B. Alternative accessible formats of this document are available on request. Persons who need an alternative format of this document or who require some other reasonable accommodation in order to participate in this process may contact the campaign at:

Phone: (406) 444-3884

Fax: (406) 444-0703

TTY Relay Service: 711

Email: cscore@mt.gov

Internet: <http://hr.mt.gov/hrpp/programsadministered.mcp>

VIII. Other Contacts.

The Campaign Advisory Council and the many generous campaign volunteers welcome and encourage the broadest participation possible in the campaign. If you have any questions about the campaign, eligibility, the application process or suggestions to improve the campaign, we welcome your calls or emails. Feel free to contact:

Jack Lynch, Chair (tel. 406-444-4573, email jlynch@mt.gov)

Mary Wright, Vice Chair and Eligibility Chair (tel. 406-444-9698, email mwright@mt.gov)

Beki Brandborg, Program Coordinator (tel. 406-442-2265, email beki@initco.net)

IX. IMPORTANT!

- A. Federations must include an accurate list of all affiliated non-profits for which it is applying along with its application and the application fee.**
- B. Complete applications must be received by May 15, 2009. Applications received after May 15, 2009 will be denied.**
- C. Checks for the application fee (\$60 for federation plus \$4 for each affiliate) should be made out to "State Employees' Charitable Giving Campaign."**
- D. Please return all application materials by the May 15 deadline to:**

**State Employees' Charitable Giving Campaign
Department of Administration
State Human Resources Division
P.O. Box 200127
Helena, Montana 59620-0127
(406) 444-3871**

THANK YOU FOR YOUR INTEREST IN THE CAMPAIGN.