

## **CHARITABLE GIVING CAMPAIGN/MCPS WORKPLACE FUNDRAISING**

On an annual basis, charitable, non-profit organizations and federations not affiliated with Missoula County Public Schools may be authorized to conduct a workplace fund-raising campaign in accordance with the following provisions. The organizations included in the Charitable Giving campaign will be determined by the Superintendent and/or Designee. All workplace fund raising/charitable campaigns shall be conducted in the fall of each year.

### **Eligibility:**

For the purpose of this regulation, a charitable, non-profit organization or federation is defined as one which:

1. is a single organization or a federation of organizations which is recognized by the Internal Revenue Service as tax exempt under 26 U.S.C. 501(c)(3) and to which contributions are tax-deductible pursuant to 26 U.S.C. 170;
2. has filed an IRS 990 Form for the most current fiscal year;
3. provides, as an organization, direct services, benefits, assistance, or educational activities within Missoula County and expends at least 75 percent of the organization funds within Missoula County, and has board of director representatives from Missoula County; or provides, as a federation, that at least one-half its member agencies or organizations have a substantial presence and provide direct services, benefits, assistance, or educational activities within the County of Missoula and counties contiguous to Missoula County; has board of director representatives from the State of Montana; and spends all federation and federation member organization funds received from the Missoula County Public Schools employees' contributions within the State of Montana;
4. is directed by an active and responsible governing board with a majority of members who serve without compensation;
5. is accounting for its funds in accordance with generally accepted accounting principles, including an audit, review or management review conducted by an independent CPA;
6. has a written policy and procedure of nondiscrimination in regard to race, color religion, national origin, handicap, age, marital status, sex, or sexual orientation, applicable to persons served by the organization or federation; applicable to the organization's or federation's staff; and applicable to membership on the charitable organization's or federation's board of directors; and
7. provides full disclosure of administrative and fund-raising costs and distribution of contributions. (The totals from Columns (C) and (D) in the Statement of Functional Expenses on the IRS Form 990 will be used to determine the fund-raising and administrative expenses.

### **Application:**

1. An organization or federation which seeks authorization to conduct a fund-raising campaign must apply to the Superintendent of Missoula County Public Schools.
2. All materials required for eligibility consideration must be received by July 1 of the calendar year in which the campaign is to be conducted.
3. Authorization to conduct the campaign shall be given by the District Superintendent or designee upon recommendation of the Charitable Giving Committee.
4. The authorization is effective for only the year in which it is given.
5. Upon request of the District Superintendent or designee, a charitable organization or federation must provide documentation to substantiate the criteria and conditions noted above.
6. To ensure that the organizations or federations which wish to solicit donations from District employees in the work place are accurately portraying their programs and benefits, each organization or federation applying to participate must affirm in writing annually that the organization or federation meets the above stated criteria and conditions.

### **Application Requirements:**

1. Organizations or federations applying to participate in the Missoula County Public Schools Workplace Fund Raising Charitable Campaign must complete and file the Application and Agreement which binds them to the campaign stipulations.
2. Organizations or federations applying must provide all of the following
  - a. A description of the services, benefits, assistance, or program activities of each agency; a description of how and where the citizens of Missoula can contact and/or locate the organization or federation, including the telephone number and the name under which the listing is found.

**Payroll Deductions:**

If an organization or federation authorized to conduct a fund-raising campaign on campus wishes to utilize the school district's payroll process for employee-initiated, voluntary payroll deductions, the organization or federation must, on an annual basis, satisfy the following conditions:

1. Utilize a payroll deduction authorization form that has been approved by the District, and
2. Payroll deductions will be effective on a calendar year basis beginning in January of the calendar year following the campaign.

**Solicitation:**

The Campaign Chair(s) will coordinate the annual fund-raising campaign. Solicitation parameters will be established by the District Superintendent and will be subject to the following minimum guidelines:

1. There will be a single solicitation of District employees. A single appeal letter, brochure and payroll deduction pledge card will be permitted for all organizations or federations for internal distribution.
2. Campaign Chair(s) for the campaign will be appointed by the Superintendent. Other employees may assist with campaign duties upon request of the Campaign Chair(s), with the approval of their supervisors.
3. The Campaign Chair(s) will be responsible for:
4. Reviewing and recommending applicants
5. Approval of campaign materials
6. Any campaign presentations will be scheduled through appropriate supervisors who reserve the right to limit the number and length of such meetings.
7. Payroll deduction forms will be delivered to the Director of Business Services. Pledge cards will be given to the organization(s) or federation(s) responsible for the campaign.

The District Superintendent or designee is the final authority in the interpretation or determination of any rules, policies, contracts, etc.