

Policy: **Charitable Organizations**  
Policy Number: 25.0  
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Approved By: George M. Dennison, President

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All University policies are available in an alternative format upon request.

I. POLICY

On an annual basis, charitable, non-profit organizations and federations may participate in a workplace fund-raising campaign in accordance with the following provisions. This policy does not apply to organizations associated with the University, which will be authorized to conduct fund-raising campaigns with the approval of the President of The University of Montana. The Director of University Relations is the final authority in the interpretation or determination of any rules, policies and contracts.

**ELIGIBILITY**

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

- A. is a single organization or a federation consisting of ten (10) or more member agencies 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;
- B. has filed an IRS 990 Form for the previous fiscal year;
- C. as an individual organization, has a substantial presence and provides direct services, benefits, assistance, or educational activities within the County of Missoula and counties contiguous to Missoula County; expends at least 75 percent of the organization funds (including funds raised from University of Montana-Missoula employees) within Missoula County and counties contiguous to Missoula County; and includes as a majority of its board of directors representatives from the State of Montana;  
  
as a federation, has at least one-half its member agencies or organizations with a substantial presence and providing direct services, benefits, assistance, or educational activities within the County of Missoula and counties contiguous to Missoula County; includes as a majority of its board of directors representatives from the State of Montana and spends all federation and federation member organization funds received from University of Montana-Missoula employees' contributions within the State of Montana;
- D. is directed by an active and responsible governing board with a majority of members who serve without compensation;

- E. is accounting for its funds in accordance with generally accepted accounting principles, including an audit, review or management review conducted by an independent CPA for the previous fiscal year;
- F. has a written policy and procedure of nondiscrimination in regard to race, color, religion, national origin, disability, age, marital status or gender applicable to persons served by the organization; applicable to the organization's staff; and applicable to membership on the charitable organization's board of directors; and
- G. provides full disclosure of administrative and fund-raising costs (not to exceed 25 percent) and distribution of contributions.

The totals from Columns (C) and (D) in the Statement of Functional Expenses in the IRS Form 990 will be used to determine the fund-raising and administrative expenses.

#### **APPLICATION**

- A. An organization or federation that seeks authorization to participate in the University's Charitable Giving Campaign must apply to the Director of University Relations, The University of Montana, Missoula, MT 59812.
- B. All materials required for eligibility consideration must be received by the specified deadline of the year in which the campaign is to be conducted.
- C. Authorization to conduct the campaign shall be given by the President upon recommendation of the Director of University Relations and The University of Montana-Missoula Charitable Giving Executive Committee.
- D. The authorization is effective for only the year in which it is given.
- E. Upon request of the Campaign Chair, a charitable organization or federation must provide documentation to substantiate the criteria and conditions noted above.
- F. To ensure that the organizations that wish to participate in the campaign are accurately portraying their programs and benefits, each organization or federation applying to participate must affirm annually that the organization substantiates they meet the above-stated criteria and conditions.

**APPLICATION REQUIREMENTS**

- A. Organizations or federations applying to participate in The University of Montana-Missoula Charitable Giving Campaign must sign an application and agreement which binds them to the items indicated.
- B. Organizations or federations applying must provide all of the following:
- C. A description of the services, benefits, assistance, or educational activities of each eligible agency; a description of how and where the citizens of Montana can contact and/or locate the organization, including the telephone number, the name that the listing is found under, the name of the telephone directory in which the member organization is listed, a list of board members, copy of previous year's IRS Form 990, and a copy of previous year's audit or management review.
- D. Federations, as defined in this policy, must certify their member agencies as eligible to be included in the campaign.

**PAYROLL DEDUCTIONS**

If an authorized organization wishes to utilize The University of Montana-Missoula payroll process for employee-initiated, voluntary payroll deductions, the organization must, on an annual basis, accept the following conditions:

- A. A payroll deduction authorization form that has been approved by Human Resource Services; and
- B. Payroll deductions effective on a calendar year basis and initiated in January of the year following the campaign.
- C. Payments forwarded to agencies either monthly or quarterly, depending on the number of employees utilizing payroll deduction.

**SOLICITATION**

The Director of University Relations will coordinate the annual Charitable Giving Campaign for non-University organizations. Solicitation parameters will be established by the Director and will be subject to the following minimum guidelines:

- A. There will be a single solicitation of University employees by those organizations and federations authorized to participate in the campaign. No other charitable solicitations may occur at an employee's workplace.
- B. A single appeal letter, brochure and payroll deduction pledge card will be created by the Executive Committee and will include summarized information for all authorized organizations.
- C. The Office of Human Resource Services will provide one (1) set of mailing labels for all current University employees.

D. The University of Montana-Missoula Charitable Giving Executive Committee will be appointed by the President. The Committee will be comprised of:

- 1 representative of Administration and Finance;
- 3 representatives of Academic Affairs;
- 2 representatives of Student Affairs; and
- 2 permanent members representing the President: the Director of University Relations and the Director of Internal Audit.

E. The University of Montana-Missoula Charitable Giving Executive Committee will have the following responsibilities:

- 1. review applications and make determinations as to eligibility;
- 2. recruit campaign solicitors;
- 3. prepare and/or approve campaign materials;
- 4. select the campaign chair; and
- 5. coordinate the overall Charitable Giving Campaign

F. A single deadline for turning in pledge forms will be established.